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Inclusive Leadership's Evolving Context: Organizational Climate and Culture Connect

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Antioch University - PhD Program in Leadership and Change

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Inclusive Leadership's Evolving Context:
Organizational Climate and Culture Connect

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A Dissertation

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This dissertation has been approved in partial fulfillment of the requirements for the degree of PhD in Leadership and Change, Graduate School of Leadership and Change, Antioch University

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- Elizabeth Holloway, PhD, Committee Member
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Dedication

This research is dedicated to the participant school district in this study. Honoring their students and families with open hearts and grace, these committed educators and colleagues embrace an inclusive approach in their efforts to enrich educational experiences to improve people’s lives. The district and its school teams embody character and compassion as they work towards growing inclusiveness to support meaningful human connection by valuing the uniqueness of individuals and groups and bridging these with belonging and togetherness within their community. Their authentic perspectives and courageous change initiatives model optimism and progress against a backdrop of tension and complexity in our increasingly interdependent, global society.

Abstract

Conventional forms of leadership that are prominent in organizational life today are seemingly antithetical to the landscape of our dynamic, global society. The continued focus on traditional hierarchies with leadership that functions in a “chain of command” manner begs the question of how organizations can reshape routines and relationships to reflect processes of inclusion and collaboration that have the capability of provoking progressive change in organizations. Diversity and Inclusion scholars have identified the newer construct of inclusive leadership as apt to advance climates and cultures of inclusion through social processes that encourage inclusive practices and behaviors. These fluid aspects of inclusive leadership strengthen how organizations foster the engagement of organizational members across groups, functions, and/or levels to stimulate change within work settings. While scholars have ascertained the necessity of expanding our knowledge of the inclusion construct by examining inclusion in more depth, inclusive leadership remains an anomaly as it positions leadership as a collective, social process. The complexities associated with research in this area were instrumental in my choice to pursue an exploratory critical (single) case study with grounded theory for this dissertation research to better understand the social processes associated with inclusive leadership within a contained work environment. This multiple method qualitative study utilized intensive interviewing, field observations, and document reviews to explore inclusive leadership in a K-12 school district. Thematic, content, and dimensional analyses elicited findings associated with human connection, change, and evolving contexts associated with inclusive systems. The overlapping case

study and grounded theory findings served as the basis for the development of an inclusive leadership model. The research provided empirical evidence of inclusive leadership's effect on organizational climates and cultures eliciting four theoretical propositions that expand scholarship in the areas inclusive leadership, inclusive practices and behaviors, and climates and cultures of inclusion. Recommendations for future research invite further exploration of inclusive leadership with inquiry across multiple organizations and/or different sectors with the use of different research designs to build on this study's findings. This dissertation is available in open access at AURA, <http://aura.antioch.edu/> and OhioLINK ETD Center, <https://etd.ohiolink.edu>

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Chapter I: Introduction

Today's interdependent society signals the need for heightened levels of collaboration in organizations to achieve success against a dynamic global backdrop. Diversity and inclusion scholars Ferdman and Deane (2014) captured the significance of this when they postulated:

In today's and tomorrow's societies and workplaces, it is imperative to reduce and prevent invidious bias and discrimination, to eliminate negative conflicts, to avoid waste, to increase fairness, and to take better advantage of all possible resources, in ways that ideally result in creativity, innovation, and better outcomes for more people, for their organizations, and for society as a whole. (p. xxi)

This provokes questions pertaining to conventional leadership styles since they have traditionally hinged on administering direction and supervision to workers and work flows in the context of "chain of command" structures. Reshaping such routines with an inclusive approach presents a transformational opportunity for organizations, and scholars have identified inclusive leadership as capable of stimulating such a shift.

Inclusive leadership is a rather intricate concept that deviates from predominant leadership theories as it emphasizes leadership as a collective, social process. Defining this in my own words, the process of inclusive leadership is catalyzed at the individual and group levels by way of relational, participative, and communicative practices. These are inclusive in nature, and typically characterized by the:

- Maximizing of inclusion and participation at all levels within an organization, which evidences less emphasis on a leader-follower managed work flow;
- Establishing of safe and reciprocal voice channels that encourages employee input and action thereby minimizing the power relations typically associated with different groups//levels/functions in a hierarchical structure;

- Engaging of organizational members in decision-making and change processes;
- Committing to ethics of caring and support that embrace diversity, treat uniqueness as an asset, and reinforce strong human connection;
- Building of high quality communication and relationships within and across units; and
- Fostering of a cycle of learning and development for all organizational members.

Over time inclusive leaders and their collectives strengthen inclusion practices which develops climates and cultures of inclusion within their organizations. The social process of inclusive leadership is highly productive, and consistent with positive attributes that Positive Organization Scholarship (POS) scholars recognize as generative in organizational life such as flourishing and virtuousness (Cameron & Spreitzer, 2012). Inclusion and POS hold this likeness, and “there is growing recognition by scholars and practitioners that great benefits can be derived by organizations and their members by focusing on excellence, strengths, and vitality” (Ferdman & Deane, 2014, p. xxvi). With this in mind, I have utilized a POS lens for my dissertation research.

It has been ascertained that inclusive leadership advances values and practices of inclusion which enable an organization and its members to “fully connect with, engage, and utilize people across all types of differences” (Ferdman & Deane, 2014, p. xxiv). POS scholars Dutton and Heaphy (2003) highlighted the essential nature of high quality connections (HQC) in the workplace as organizations depend on people to interact to accomplish work, which ultimately impacts how organizations function. This

in turn develops the organization's social capital and positions it for generative outcomes. Inclusion practices encompass a mindful commitment to cultivating meaningful human connections that elicit high levels of collaboration amongst organizational members. These practices involve deep focus on high quality communication and relationships while emphasizing the necessity of employee voice and participation. This is described as a "virtuous cycle that is beneficial for both individuals and the larger groups and/or organizations to which they belong" (Ferdman & Deane, 2014, p. xxii), and it points to how the actualization of inclusion is dependent on a leadership style that is relational, participative, and communicative in stance (Ferdman & Deane, 2014). The aforementioned dynamics have been evidenced in research across a range of organizations with especially applicative outcomes in school settings.

Gallegos (2014) highlighted the path towards becoming an inclusive organization is an ongoing commitment with emphasis on the "dynamic interplay of people and practices" (p. 181). She accentuated this premise noting:

Inclusive leadership and cultures of inclusion hold great promise for new ways of relating, sense making, and creativity. The shift from cultures of individuality to collectivism, from isolation to collaboration, and from competition to mutuality can tap resources and energy needed to address the challenges to come. (p. 197)

This previews the necessity of cultivating inclusive work environments that have an ongoing focus on how members relate to one another and experience work activities. Context holds significance as it helps to shape the type of relational dynamics that evolve in organizations. In this vein, inclusive environments balance interdependence and collaboration while preserving diversity and uniqueness to build rich interaction and growth outcomes by way of deflecting traditional power structures (Fletcher & Ragins,

2007). Drawing from mentoring scholarship, this type of connection is framed as “growth-fostering interaction . . . [and] growth in connection interactions” (Fletcher & Ragins, 2007, pp. 381, 384) which encourages mutuality rather than the one-dimensional interactions that naturally occur in typical hierarchies. Inclusive leaders promote and model such relational perspectives and interactions.

Social behaviors and contextual dynamics carry great strength with defining the tone of organizations. By shaping workplace climates and cultures to prioritize relationship building, communication, collaboration, and learning, the generative capacity of organizations can be broadened. This intimates how the social processes of inclusive leadership and inclusive practices offer a promising alternative to traditional organizational practices. The possibilities associated with inclusion and its collective focus have been a motivating factor in my scholar-practitioner aspirations; and, this introductory discussion on inclusive leadership, inclusive practices, and cultures and climates of inclusion previews my dissertation work.

Research Question

This study centered on discovering how members of an organization experience inclusive leadership. In particular, it explored lived experiences in a school environment that espouses inclusive leadership to learn how that shapes an organization’s processes and context. My inquisitiveness surrounding the evolving construct of inclusion elicited a number of questions pertaining to the nature of inclusive leadership including:

- What constitutes inclusive leadership?

- What is happening when inclusive leadership is present in an organization?
What are the conditions and context?
- How is inclusive leadership significant to member behaviors?
- When is inclusive leadership effective with promoting worthy organizational outcomes?
- How does inclusive leadership shape work settings? How do organizations evolve into inclusive climates and cultures?
- How is inclusion developed in practitioner settings?
- What prevents inclusive leadership?

The main aim of my dissertation has been to unearth what is happening when inclusive leadership shapes the individual and collective social processes within the context of an organization. If we can better understand how inclusion is generative, we can foster healthier organizational social processes and practices to advance organizational capabilities to be more productive in today's complex business environment. This study aligns with how scholars have advocated for expanding research in the areas of inclusion, and organizational culture and workplace climate. By exploring inclusion within the context of a single organizational case my research can help scholar-practitioners discover more about positive social processes that are stimulated by inclusion and impact organizational life. To achieve this, my dissertation has involved an exploratory critical case study and grounded theory to explore the social processes associated with inclusive leadership within the context of one organizational setting. This approach is fitting as:

The practice of inclusion is dynamic and ongoing: because inclusion is created and co-created continuously—in both small and large ways—organizations,

groups, and individuals cannot work on becoming inclusive just once and then assume that they are done; it is a recursive and never-ending approach to work and life. (Ferdman, 2014, p. 13)

Rationale for the Study

Organizational life is a social phenomenon involving social processes (such as inclusive leadership and inclusion practices) that have been examined in scholarly inquiry across various disciplines as there are a range of complexities that stem from people dynamics and their work environments. While research has established that organizational behaviors and contexts are malleable—and often influenced by leadership—our understanding of the inclusion construct is limited as it has predominately been researched as an extension of diversity management (Ferdman & Deane, 2014). At this juncture, scholarship circles have acknowledged the importance of examining inclusion more closely as well as establishing how diversity and inclusion interrelate with each other even though the complexities associated with this construct do present some challenges (Ferdman & Deane, 2014).

The collective nature of inclusion hints at some of the obstacles with explicating its social processes. As Ferdman (2014) posited:

Many of the challenges of inclusion involve attending to and engaging with seeming polarities and paradoxes, in the process of creating connections and practices that can work for everyone and allow everyone to work to their full potential. They also involve being willing to reexamine and test assumptions and to join with others with different perspectives and contributions so as to together weave an emergent and textured reality that none of us could have created or anticipated alone. (p. 45)

This assessment alludes to the ambiguity associated with inclusion, and consequently, research in this area requires a carefully thought out research design and method to insure rigorous study.

Alongside the gap in inclusion scholarship, organizational culture and workplace climate researchers now recognize there is significant opportunity to examine how these two constructs bridge in organizational life as, traditionally, they have been researched separately (Ehrhart, Schneider, & Macey, 2014). This has left me particularly inquisitive of the roles that both organizational leaders and members play to advance the social behaviors represented in inclusive organizations and how that interplay shapes climates and cultures of inclusion. From my perspective, the collective aspects to inclusive leadership and inclusive practices suggest that it holds the capability to impact the climates and cultures of organizations, and therefore, learning more about the collective nature of inclusion may potentially address the void in knowledge pertaining to how climate and culture are complementary in work settings.

The newly developing area of inclusion, as well as the gap with how climate and culture link together in workplaces, substantiated the need for my research as an avenue for contributing to scholarship. The findings from this research advance knowledge in the developing area of inclusion as well as advance understanding of how inclusive leadership can be embraced by practitioners to lead progressive change. The multi-faceted and fluid components to the behavioral and contextual dynamics related to inclusive leadership, practices of inclusion, and cultures and climates of inclusion presented an optimal opportunity to employ qualitative inquiry for my dissertation research.

Research Design and Methodological Approach

Denzin and Lincoln (2000) posited “qualitative research is a situated activity that locates the observer in the world. It consists of a set of interpretive, material practices

that make the world visible. These practices transform the world” (p. 3). This accurately describes the relevance of qualitative inquiry as a path for examining inclusive leadership, and fittingly parallels with my own world views on the exploration of the social processes that encompass inclusive leadership, practices of inclusion, and cultures and climates of inclusion. Epistemologically, this study is positioned within the interpretivist paradigm with a constructivist lens, which forego the hypothetical assumptions of causality— the focus embraced in quantitative inquiry—instead, supporting a qualitative research design (Creswell, 2014). Understanding the essence of social behaviors and work contexts that are fostered by inclusive leadership required a form of inquiry that offered an inductive approach to allow for the understanding of lived experiences.

In order to understand the collective approach and social processes that characterize inclusive leadership, practices of inclusion, and cultures and climates of inclusion, the qualitative design for my study entailed an exploratory critical single case study and constructivist grounded theory method (GTM). Yin (2014) emphasized that exploratory case studies aid a researcher in collecting data for furthering future inquiry which aligns with the identified need to expand inquiry on inclusion. In addition, examining a single organizational case affords the opportunity to critically test current theory on inclusive leadership and its collective nature as well as glimpse the relationship between climate and culture. The use of constructivist grounded theory (Morse et al., 2009) as a method aligned well with this design as it,

- takes a problem-solving approach,
- views reality as fluid, somewhat indeterminate,

- assumes a situated and embodied knowledge producer,
- assumes search for multiple perspectives,
- aims to study people's actions to solve emergent problems,
- sees facts and values as co-constitutive, and
- views truth as conditional. (p. 139)

Grounded theory's favoring of an emergent philosophy complemented the single case study design, and its systematic practices insured the rigor necessary for inquiry of this nature.

Researcher Positionality

It has been surmised that a researcher's "capacity includes prior experiences, knowledge, attitudes, and personal drives or ambitions," and as a reflective scholar-practitioner I am aware that my positionality has guided the nature of my research topic as well as influenced my choice of design and method (Bentz & Shapiro, 1998, p. 79). Despite identifying as a White female who grew up in a middle-class family environment, my childhood was atypical as my father's 20-year career as an Air Force pilot drew us to life in different countries. I consider those experiences to have been a gift, and understand that my values and biases have grown from those privileged influences. My position of passion and commitment to this dissertation research is driven by four central themes that have evolved over the course of my life. At a broad level these comprise of:

- An overwhelming appreciation for the uniqueness and diversity associated with people of all backgrounds and the cultures from which they identify. This

- mindset has grown enormously through my years of life overseas, teaching English as a Second Language, and working in higher education leadership;
- A deep connection to learning through experience and context which has been a driver of meaningful change in my own leadership development and practice as an inclusive leader;
 - A growing consternation with the traditional formats that have defined schooling in my youth and professional experiences in my adulthood in a variety of organizations. Often these have depicted stagnant, top-down bureaucracies that fail to establish meaningful human connection as a vehicle for discovery, growth, and progressive change; and
 - A profound yearning to shift traditional learning and work structures to be more inclusive, participative, and people-focused as an avenue for powerful and generative change that benefits both individuals and collectives.

These themes have progressively evolved over the course of my life shaping my personal values, leadership philosophy, scholarly interests, and career pathway.

My career has exposed me to several organizations varying in size and industry, most of which have functioned in a top-down manner. This has left me with the impression that many workplaces are representative of traditional hierarchies that employ “direct and tell” ways of fostering workflows. In some respects leader behaviors in those settings correlate to how critical theorists and critical management studies theorists position human power relationships with negative undertones of dominance. Candidly, my diverse work experiences leave me stunned by how these power relationships still replicate themselves, establishing parameters for a “listen and follow”

mentality as the norm in many organizations. Booysen (2014) effectively contrasts inclusive organizations with those that exclusively highlight how individuals and groups in exclusive workplaces,

need to conform to pre-established 'mainstream' value systems and ways of doing things . . . whereas inclusive workplaces are based on a collaborative, pluralistic, co-constructed, and co-evolving value frame that relies on mutual respect, equal contribution, standpoint plurality (multiple viewpoints), and valuing of difference. (p. 298)

My assessment of work contexts that are exclusive (versus inclusive) is that they cement transactional mindsets; and, instill ineffective behaviors within organizational life such as obedience of members with a precise focus on carrying out directions, as well as who are reluctant to ask questions, speak openly, or make decisions. In turn, this has the potential to evolve silos between groups and/or units within the organization which prevents the optimization of collaboration, creativity, and change.

And yet, when I have countered top-down customs and fostered inclusion practices with my own teams, the contexts have become the impetus for developing, evolving, and sustaining positive work environments that heightened outcomes at the individual, unit, and organizational levels. For a very long time my curiosity and ponderings have centered on how inclusive work contexts can be fostered to improve human connection and organizational outcomes, and this has been the impetus for my research on inclusive leadership.

My aim with researching inclusive leadership has been to understand the process that evolves with practices of inclusion and how that shapes organizational climates and cultures. Alongside contributing to scholarship in this developing area of research, my intention has been to discern actionable ways that education leader practitioners, organization development consultants, and other professionals, can

embrace and champion inclusive leadership as a way to generate positive change and insure relevance and success for their organizations. As I reflect on this, I am cognizant that my research has been driven by my personal and practitioner experiences which have fostered this commitment to alter the course of traditional organizations with inclusive leadership.

Organization of Dissertation

The chapters to follow include an integrated literature review followed by a detailed account of my research approach, design, method, findings, implications of findings and recommendations. Respectively, Chapter II's literature review includes an in-depth discussion of research that informs diversity and inclusion, inclusive leadership, inclusive practices, and cultures and climates of inclusion. Additionally, the review extends beyond diversity and inclusion scholarship, offering insights from POS, organizational culture and climate, and other areas of scholarship associated with organizational behavior. Chapter III's description of the multiple method research design discusses the epistemological grounding and rationale for this research as well as details the case study approach, GTM, data collection and management, and ethical considerations. The emphases presented in Chapters II and III demonstrate the rationale for this research, and the strong fit and rigor that have been achieved with an exploratory critical (single) case study using GTM. Chapter IV covers the case study context and findings. Chapter V outlines the GTM analysis, modeling, and findings. Lastly, Chapter VI offers conclusive discussion on the research and its implications.

Chapter II: Literature Review

In concert with grounded theory principles this chapter presents an integrated literature review. This literature review is pertinent to my research as it presents the rationale for a case study and establishes my own sensitizing concepts in alignment with constructivist GTM practices, which are described in Chapter III. To illuminate my research findings. I return to relevant scholarship in more depth in Chapter VI

This chapter details a comprehensive review of scholarship comprised of research in the areas of diversity and inclusion, positive organizational scholarship (POS), organizational culture and climate as well as several topics that fall within the context of organizational behavior. This selection of literature resulted from a multiple-strategy search process, and my rationale for the inclusion criteria is that these areas serve as a vehicle for integrating multi-disciplinary perspectives that help to frame the complex and fluid dimensions of the inclusion construct. My research concept centers on understanding how inclusive leadership guides the collective processes associated with inclusion. To achieve this, I have examined lived experiences with inclusive leadership within the context of a single organizational case. This literature review will incorporate theoretical underpinnings and empirical findings from these research domains to appraise how inclusive leadership and practices advance dynamics at the individual, group, and systems levels in organizations while sketching inclusion's relevance to our dynamic and interdependent global society.

Diversity and Inclusion scholars have explicitly asserted the importance of discerning “how inclusion relates to diversity, what inclusion is, and how it operates” (Ferdman & Deane, 2014, p. 4) as well as how inclusion and outcomes are interrelated

(Shore et al., 2011). This identified gap in scholarship affirms the essentiality of expanding on our understanding of the inclusion construct. In many respects, its broad yet intricate nature imparts a labyrinth-like perplexity. Shifting away from entity perspectives (leader-follower focus), inclusive leadership emphasizes relational practices to cultivate relationship-building and collaboration (Gallegos, 2014; Uhl-Bien, 2006). This relational work is instrumental as the development of diverse, high-quality relationships promotes the openness and trust necessary for safe voice channels and participation in decision-making across all levels within an organization. In this respect, inclusive leadership helps to shape the climate and culture of inclusive organizations. The complexities associated with inclusion necessitate this literature review cover both behavioral and contextual components that hold relevance to developing and sustaining the productive practices evident in inclusive organizations.

The chapter begins with an overview of the emergence of diversity practices in U.S. organizations and the foundation of scholar-practitioner thinking on inclusion. The sections to follow are organized around topics that bridge inclusion to leadership, organizational behavior, and organizational culture and climate through a POS lens. After the review of the relevant theory and research, I summarize the prominent themes that support this study on inclusion and highlight my own operating definitions of inclusive leadership, practices, and contexts with a model that offers a visual portrayal of the interplaying components that emerge in inclusive organizations.

Diversity and Inclusion

Origins of diversity. Diversity has been defined as “the representation of multiple identity groups and their cultures in a particular organization or work group”

(Ferdman & Deane, 2014, p. 3), and the focus on diversity practices evolved as a result of the U.S. Civil Rights Movement in the 1960s. Mandating of fair treatment for protected classes of employees occurred by way of equal employment and affirmative action legislation later followed by anti-discrimination laws (Offermann & Basford, 2014).

This ignited diversity programs with the aim of:

Addressing inequities, targeting oppression, and bringing the promise of civil rights to the workplace—with a primary emphasis on gender, race, ethnicity, and sometimes cultural and national origins, and combined with the goal of preparing for demographic shifts in the workforce and increasing globalization—the field developed to incorporate attention to reaping the potential business benefits of diversity of various types, both invisible and visible, including sexual orientation, ability status, age, social class, religion, life experience, and a myriad of other dimensions. (Ferdman & Deane, 2014, p. xxiii)

The emphasis on equality in the workplace was to insure organizations engaged employees in a fair manner, and these changes significantly influenced how organizations and their human resources (HR) departments developed policies and procedures to uphold the new legislative standards (Offermann & Basford, 2014). Diversity practices became instrumental to addressing inequities and tensions associated with human differences in the workplace as evidenced with how organizations have since evolved towards fair practices with employee recruitment, training, retention, and assessment (Davidson, 2016; Ferdman & Deane, 2014; Offermann & Basford, 2014; Winters, 2014).

Diversity paradigms and related theories. Several paradigms and theories offer insights into the effectiveness and potential associated with diversity practices as well as human needs with respect to social identification.

Social identity theory. Social identity theory has helped to inform our understanding of how humans have a need for inclusion and differentiation, which can

be achieved through social group identification (Chrobot-Mason, Yip, & Yu, 2016). With this type of identification “individuals are able to meet both needs; they experience a sense of belonging and affiliation with others in the group and also differentiate themselves based on group identity” (Chrobot-Mason et al., 2016, p. 106). Nkomo (2010) suggested this theory as important for helping leaders to see how diversity can influence intergroup relations and the dynamics associated with in-groups and out-groups. Of relevance to inclusive leadership is the intentional encouragement of cross-group relations by creating the “right conditions for positive contact among different groups” as well as reinforcing “informal norms of valuing differences” (Ruderman, Glover, Chrobot-Mason, & Ernst, 2010, p. 107). Any number of internal and/or external factors can impact in-group and out-group dynamics resulting in either positive or negative forces within an organization (Nkomo, 2010). For this reason, it is argued that certain leadership skills and practices can help alleviate social identity tensions, and scholars acknowledge this as present in settings with an inclusion orientation.

Optimal distinctiveness theory. This theory addressed the tension associated with human need for similarity and validation as well as for uniqueness and individuation (Brewer, 1991; Shore et al., 2011). The relevance of this paradoxical relationship where people aim to balance the need to identify with belonging to a group yet retain their uniqueness, is that it sheds light on the complexities associated with developing inclusion in organizations. Specifically, leaders need to balance the fulfillment of these needs to achieve the strengths associated with diversity and inclusion when

co-constructing these aspects within organizational life, and the balancing of these dynamics alludes to the fluid and evolving nature of inclusive contexts.

Learning and effectiveness paradigm. Thomas and Ely's early studies (1996) illustrated that organizational effectiveness was inhibited when diversity was approached as identity group representation with a sole emphasis on increasing racial, national, gender, and/or class representation. Their findings substantiated the need for a more integrated approach to diversity which resulted in the learning and effectiveness paradigm. This paradigm denotes dynamics where authentic value is placed on differences and this results in a heightened capacity for learning and growth by enabling organizations "to incorporate employees' perspectives into the main work of the organization and to enhance work by rethinking primary tasks and redefining markets, products, strategies, mission, business practices, and even cultures" (Thomas & Ely, 1996). This contrasts with the Discrimination and Fairness Paradigm (emphasis is on sameness through compliance with the Equal Employment Opportunity Commission (EEOC), fair treatment, and equal opportunity regulations with pressure to assimilate) and the Access and Legitimacy Paradigm (emphasis is on the acceptance and appreciation of differences with special attention to its capacity as a business differentiator allowing for better understanding of the organization's clients).

These paradigms and theories foreshadowed current scholar thinking on the need to unify diversity and inclusion efforts to insure fair and empowering practices for all individuals, groups, and levels rather than taking a singular lens on demographics (Ferdman, 2014).

Defining inclusion. Remaining somewhat undistinguished in scholarship, inclusion has been framed as a driver of diversity and as the “first step (or precursor) toward creating inclusive environments” (Ferdman & Deane, 2014). The literature referenced several definitional variations of inclusion many of which intimate the importance of individual/group experiences and relationships in organizations (see Table 2.1). However, the concept remains somewhat nebulous.

Table 2.1

Definitions of Inclusion

Definitions	Source
Inclusion at work has to do with how organizations, groups, their leaders, and their members provide ways that allow everyone, across multiple types of differences, to participate, contribute, have voice, and feel that they are connected and belong, all without losing individual uniqueness or having to give up valuable identities or aspects of themselves.	Ferdman, 2014, p. 12
Inclusion involves creating, fostering, and sustaining practices and conditions that encourage and allow each of us to be fully ourselves with our differences from and similarities to those around us, as we work together.	Ferdman and Dean, 2014, p. xxii
Inclusion is the process of making sure that diverse perspectives that should be at the table are not only there but also fully engaged. It is based on the belief that performance to outcomes can be optimized when we value, respect, and engage a wide range of perspectives in problem-solving and decision-making.	Henderson, 2014, p. 432
The degree to which employees feel part of essential work processes including influence over the decision-making process, involvement in critical work groups, and access to information and resources.	Mor Barak, 2008; Roberson, 2006; Downey, van der Werff, Thomas, and Plaut, 2015, p. 37
Inclusion involves the elimination of marginalization and exclusion. An organization is not inclusive if only members of select groups are fortunate enough to experience social belongingness and access to the organization’s resources.	Nishii and Rich, 2014, p. 331
Diversity focuses on organizational demography, whereas inclusion focuses on the removal of obstacles to the full participation and contribution of employees in organizations.	Roberson, 2006, p. 217
The degree to which an employee perceives that he or she is an esteemed member of the work group through experiencing treatment that satisfied his or her needs for belongingness and uniqueness.	Shore et al., 2011, p. 1265

These definitions of inclusion accentuate the relevance of organizational members' workplace experiences and how employees and work groups relate and connect within the organizational context. The key themes illustrate how inclusion moves beyond the foundation of diversity into a broader realm of human interaction and behavior as evidenced in how the definitions in Table 2.1 highlight inclusion's focus on how:

- Organizational members engage with each other;
- Conditions of encouragement and belonging around individual and/or group uniqueness are created; and
- Work processes, decision-making, and effecting change are inclusive activities involving all levels within an organization.

Many scholars view inclusion as an avenue for expanding on the benefits of diversity by attending "to the complexity of individual experience and identity, without losing sight of intergroup relations, intercultural dynamics, and systematic processes and structures" (Ferdman & Deane, 2014, xxiv). It's been ascertained that while diversity is an imperative component to organizational success alone it does not have the capacity to evolve the same significant organizational behaviors and generative outcomes that inclusion does which necessitates exploring how to integrate diversity and inclusion as both are essential in the realm of inclusive leadership (Roberson, 2006; Sabharwal, 2014).

Integrating diversity and inclusion. The literature highlights that diversity and inclusion are interrelated, and yet there remains a distinctness to how these constructs differ and function. Winters (2014) artfully distinguished diversity and inclusion by

characterizing diversity as descriptive of a state and inclusion as descriptive of an action. More specifically, diversity is a state that is mandated and legislated while inclusion occurs when human actions are engaged voluntarily. It goes without question that the regulatory aspect of diversity has been a necessity as a baseline to insure equal practices in organizations. Inclusion goes a step farther by “creating an environment that acknowledges, welcomes, and accepts approaches, styles, perspectives, and experiences, so as to allow all to reach their potential and result in enhanced organizational success” (Winters, 2014, p. 206). Offermann and Basford (2014) specified: “often diversity denotes group demographics whereas inclusion refers to participation by all” (p. 248). This signals how diversity is often placed in the context of ethnicity and gender whereas inclusion encompasses a broader angle by treating differences as resources from which the entire organization can learn and benefit (Ferdman, 2014).

The paradoxical relationship between diversity and inclusion is represented exceptionally well in Shore et al.’s (2011) theoretical discussion that explored the tensions between belongingness and uniqueness as a prevalent undercurrent in these areas. They argued that research needs to do more than demonstrate these themes exist in both the diversity and inclusion constructs; it needs to show how balancing both are a necessity to inclusion. These scholars corroborated that inclusion is associated with insider status that encompasses sharing information, participation in decision making, and having voice (Shore et al., 2011). This demonstrates how inclusion extends diversity by pairing organizational member empowerment with practices of equal and fair treatment. The notion of balancing diversity and inclusion helps to delineate the fluid

and dynamic nature of these constructs, and this also conveys the ambiguity associated with bridging diversity and inclusion.

The implications for successfully integrating diversity and inclusion are virtually infinite. The meshing of benefits from each construct can potentially result in impactful changes associated with individual and group behaviors that foster “people feeling appreciated, valued, safe, respected, listened to, and engaged” which carries generative potential for organizations in areas of productivity and harmony (Deane & Ferdman, 2014, p. xxiv). Companies like Weyerhaeuser, the Girl Scouts, and L’Oréal have modeled this with ongoing efforts to build on integrated diversity and inclusion practices (Henderson, 2014; Lemley, Roberts, Wooten, & Davidson, 2016). These organizations demonstrate there is value with bringing together individuals with differing perspectives, values, knowledge and skills as opposed to viewing diversity as a means for friction (Lemley et al., 2016).

The successful integration of diversity and inclusion is far from the norm as evidenced with statistics released by the U.S. Equal Employment Opportunity Commission (EEOC). Within the last decade data revealed discrimination complaints were on the rise as exemplified with: “more than 93,000 charges of discrimination were filed with the EEOC (2010), of which 66 percent related to race and gender” (Offermann & Basford, 2014, p. 231); this signals the importance of leading change within this realm of organizational life.

Scholars have asserted that “the answers to positive organizing in the 21st century lie in the sophisticated understanding and engagement of diversity and inclusion processes” (Roberts, Wooten, & Davidson, 2016, p. 217–218) from less of a deficit

perspective, which supports the proposition that research needs to further unpack inclusion. With the heightened awareness of inclusion as a vehicle to building on the strengths of diversity through respect for uniqueness, relational practices, and looser power structures there is opportunity to decipher how to develop and sustain inclusion in practitioner settings as well as how diversity and inclusion work together as enhancements to organizational life

Positive Organizational Scholarship (POS)

POS scholars have become active in the diversity and inclusion conversation shedding light on the value of leveraging a positive, integrative lens when exploring inclusive leadership and practices (DeGraff & Mueller, 2016; Roberts et al., 2016; Wooten, Parsons, Griswold, & Welch, 2016). They have positioned diversity as a resource rather than a deficit or problem, and argued:

In-depth examinations of marginalization aptly document disparities in treatment, advancement, inclusion, and well-being for people who represent non-dominant identity groups within organizations. Yet, the ongoing debate between 'difference-blind' organizational theorists and diversity and inclusion researchers often revolves around a problem-based dialogue: the problems of marginalization, exclusion, and bias. How does one introduce POS, which privileges the study of strengths, into this discourse, without overlooking the deficiencies of systems that promote inequality and injustice? (Roberts et al., 2016, p. 216)

Described as an *umbrella concept* POS examines processes, dynamics, perspectives, and outcomes that are positive in nature as applied to organizational phenomena in areas such as high-quality relationships, communication, and innovation (Browning, Morris, & Kee, 2012; Cameron, 2013; Cameron & Spreitzer, 2012; Roberts et al., 2016). Additionally, POS has raised ideas associated with positive states of flourishing, virtuousness, compassion, humility, hope, courage, integrity, and ethics (Cameron & Spreitzer, 2012), and many of these are relevant to the inclusion construct.

The question in my mind when reviewing the POS literature was how do the positive characteristics and strengths of this construct intertwine with the impactful attributes of inclusive leadership and inclusive organizations (see Table 2.2).

Table 2.2

POS Characteristics and Strengths

POS Characteristics and Strengths	Source
Positive Communication <ul style="list-style-type: none"> • Encourages inclusiveness, respectfulness, supportiveness • Brings about solutions-focus, future orientation, collaborative interaction • Challenges managers and employees to work together in different ways (versus traditional hierarchical organizational structures) 	Browning et al., 2012; Caza and Carroll, 2012
Positive, Extraordinary Outcomes; Deviant Performance <ul style="list-style-type: none"> • Enables human capabilities • Drives resourcefulness, positive states; Builds capacity 	Cameron, 2013
Affirmative Biases <ul style="list-style-type: none"> • Unleashes human capabilities; Stimulates activities that lead to flourishing • Addresses positive dynamics such as energy, climate, relationships, communication, meaning 	Cameron, 2013; Frederickson, 2009
Engagement <ul style="list-style-type: none"> • Leads to discretionary behaviors, in-role and extra-role performance, client satisfaction, proactivity, adaptivity, creativity • Influences energy levels at the collective level 	Rothbard and Patil, 2012
Caring Attitudes, Strong Ethics, High Quality Relationships <ul style="list-style-type: none"> • Employs practices that demonstrate sensitivity, openness and caring • Elevates the quality of relationships in organizations • Fosters the ability to navigate conflict; openness to differences • Encourages work practices that are empowering and more humane 	Caza and Carroll, 2012; Simola, 2016
Human Energy <ul style="list-style-type: none"> • Enhances use of human energy in organizations 	Spreitzer, Lam, and Quinn, 2015

This table shows significant overlap with POS characteristics and those necessary for the development of inclusion. One example of this is Browning et al.'s (2012) literature review as their work pointed to organizational integration and constructive interaction as being definitive of positive communication. This situates how pivotal relational and communication practices are to cultivating human dynamics and

organizational processes that are positive in nature. This resurfacing theme points again to the significance of how organizational members engage with each other; how conditions are shaped to create encouragement, belonging, and valuing of uniqueness; and how work processes, decision-making, and effecting change involve all levels of the organization.

POS employs an optimistic perspective on human nature and bares a genuine position of grounding central to some practitioner realities in organizational contexts, however, this newer area of scholarship also attracts criticism. Caza and Carroll (2012) conducted an extensive literature review of 35 peer-reviewed POS studies as a basis for summarizing key concerns with respect to the POS construct. Nestled within the lens of critical management studies (CMS), their critique pointed to the ambiguous and one-sided nature of POS detailing:

- There is a lack of specificity with POS' definition;
- "Positivity" requires a more explicit description;
- The POS research agenda and its objectives are unclear;
- The bias towards all positive may discount lessons learned from negative phenomena in organizational life;
- The notion of a universal desire to improve the human condition is questionable; and
- There appears to be an elitist (manager) bias that fosters serving business outcomes and financial agendas.

In response, POS scholars have acknowledged there is still much to explore with the construct, and maintain that this field of study is still in its infancy stages (Cameron,

2013). From my perspective, POS research introduces tremendous potential in terms of understanding how an emphasis on positive attributes and relational practice can bring value to (inclusive) workplace settings.

Relational perspectives and related theories. POS scholarship unveils several strengths associated with positive organizations and behaviors including the ability to navigate conflict (see Table 2.2). Extending research on how to successfully navigate conflict would heighten our understanding of effective relational practices. Jordan (1990) pointed out that western culture tends to socialize people to view and experience conflict from the lens of difference and diversity which discourages and and/or represses conflict. Contrarily, “conflict can be enriching, bringing people toward real truth rather than anemic accommodation or coercive dominance. It can grow from and foster mutuality” (p. 5).

Jordan’s (1990) work exposed how conflict can be an avenue for development between people rather than the reinforcement of power patterned relationships depicting dominance and subordination. She posited,

Relationships based on mutuality eliminate established patterns of entitlement and “power over.” The capacity to move into “good conflict” is essential to relationships based on mutuality. Courage in connection and the capacity to work for relational expansion through good conflict challenge traditional patterns of power; they expose the profoundly nonmutual and anti-relational biases present in our culture. (p. 1)

This emphasis on mutuality lends itself towards the relational aspects of POS and inclusion as it helps to establish the importance of developing the ability to effectively work through conflict with openness, respect, and trust; each an important component to healthy, thriving relationships. Inclusion practices promote a sense of

safety and confidence in organizational members, and foster authentic voice and engagement even in the presence of contradictory dominant views.

POS has influenced several areas of scholarship by encouraging more positive-oriented research on relationships. Scholars of mentorship, Fletcher and Ragins (2007) ascertained little attention had been placed on the positive end of the mentoring continuum, but that has shifted with calls “to examine the characteristics, processes, and outcomes of high-quality mentoring” to distinguish quality work from marginal and/or satisfactory forms of mentorship (p. 373).

Relational Cultural Theory (RCT). The Stone Center RCT (Ragins & Kram, 2007) “offers a unique framework to delineate the processes and outcomes associated with high-quality interactions and relationships and analyze them within the larger cultural and societal context in which they occur” (p. 374). This framework broadens the lens on mentoring to include areas such as: self-in-relation, two directional learning, non-hierarchical mode of influence, focus on growth-in-connection for increased mutual proficiency, increased ability to mutually function in a context of interdependence, skills for teaching and learning, fluid expertise, power as a systemic variable, and focus on outcomes for both mentors and mentees (p. 376). This presents a shift from one-directional mentoring, traditionally focused on career advancement, to relationships that involve mutuality and reciprocity. Ragins and Kram differentiate relational perspectives from traditional forms of mentoring with the following description:

By releasing mentors and protégés from rigid hierarchical roles of ‘teacher’ and ‘student,’ relational mentoring challenges us to think more expansively about mutual influence in high-quality learning relationships and allows us to examine our assumptions about power in the relationship . . . This relational perspective on mentoring allows us to examine interactions, social processes, and outcomes

that evolve to high-quality relationships to “generate growth, learning, and development for both mentors and protégés.” (p. 375)

Perspectives on relational practice surrounding conflict and mentoring evince the value of generating quality interactions and relationships. Growing mutuality through conflict navigation and relational mentoring are critical components to high-quality relationships helping to establish the relevance of POS to inclusion. My dissertation employed a POS lens to offset a deficit focus in my exploration of inclusive leadership. This allowed for balance with a realistic perspective on the concerning realities of power dynamics that impede the development of inclusion as postulated by RCT, critical theory, and critical management studies scholars.

Inclusive Leadership

Research on the role of leadership in organizations has established that leaders play a pivotal role in the outlook and direction of organizations. Those of us that hail from western society are familiar with the myriad of individual leader styles that make up the landscape of traditional organizations. The nature of leadership in these settings conjures up images of leaders at the helm offering diagnoses and solutions as they direct the course of a company. This is then operationalized with the cascading of vision and guidance downwards for implementation by employees through work activities that are managed by superiors within the power structure. Empirical findings suggest a range of attributes that are associated with individual leaders, and these have been hallmarked across a wide spectrum of research varying anywhere from values-based styles to coercive approaches. More pronounced circumstances on the autocratic end offer substantiation to what critical theorists and critical management studies theorists denounce as a human tendency towards domination typically driven by power and/or

economic agendas (How, 2003). While there is dramatic variation in leader styles encountered in organizations, it is commonplace for individual leader interactions to occur as top down exchanges in the form of delegation and supervision, and this seemingly plays into the essence of habitude that reinforces the dominating protocols and customs represented in the common hierarchical formats present in organizations today.

Pless and Maak (2004) characterized this notion of the individual leader: superiors are seen as thinking subjects, whereas employees are executing objects. This represses “employee thought and action potential” and ultimately lessens creative and innovative potential (p. 136). Such individual leader styles paired with top-down power relationships remain the trend even though scholarship across numerous disciplines has validated the relevance of employee participation as a hearty component to elevating organizations in today’s fast moving, interconnected global society. The question of what signals an inclusive leader and how that differs from traditional leader behaviors is foundational to understanding how inclusion can be developed and sustained in organizational life.

The literature distinguished inclusive leadership as a relational construct which contrasts with traditional forms of leadership that tend to be positioned as designations and individual responsibilities (Ferdman & Deane, 2014). At some basic level inclusive leaders embrace a collective stance which deviates from more conventional leader approaches. It is broadly described as “the consequence of mutual influence and collective adaptation to fluid environments” (Gallegos, 2014, p. 178). Booyesen (2014) deepened the idea of inclusive leadership as a relational construct specifying that,

“relationship-based leader perspectives are thus more process- and context-focused and emphasize participation, collaboration, follower expectations, inclusion, and implicit leadership models” (p. 303).

Relational practice is an essential component to inclusive leadership for a number of reasons:

- It broadens transparency and openness while deflecting negative human behaviors that can emerge in the presence of diversity.
- It de-mystifies individual and group differences which typically deter collaboration.
- It de-emphasizes power structures and dominance to create community and invite engagement.

Gallegos (2014) used the term “allophilia” to describe this aspect of inclusive leadership as it is “based on the development of liking and empathy for others who are different, and it can be supported by actions such as identifying common goals that bind people together and creating greater cohesion across groups” (pp. 188–189).

Aligned with this, the literature pointed to various inclusive leader attributes which are highlighted in Table 2.3.

Table 2.3

Inclusive Leader Attributes

Inclusive Leader Attributes
<ul style="list-style-type: none"> • Recognizing the value of diversity to their organization; • Respecting, appreciating, and championing diversity while eliminating exclusion and marginalization; • Building trust; • Embracing different approaches; • Developing extensive channels for communication, and modeling openness and listening; • Fostering relational practices; • Collaborating with individuals and groups in a manner that gives voice and fully engages organizational members; • Embracing a systems (collective) approach with organizational direction, decision-making, and change priorities; • Establishing high expectations and accountability at all levels; • Facilitating ongoing learning to grow capacity and adaptive capability; • Insuring policies, practices, and structures support each of these; and • Understanding the cyclical nature that sustains inclusion.

Note. This summary is based on readings of Booyesen (2014), Ferdman (2014), Henderson (2014); Mor Barak (2011), Nishii and Rich (2014), and Offermann and Basford (2014).

The attributes associated with inclusive leaders expose the implication that to build an inclusive organization there must be a robust emphasis on relational practices, empowerment, and high-quality communication. These distinct practices require a systems lens with emphasis on leadership as a process, which shifts away from traditional leadership paradigms and aligns with Booyesen's (2014) assessment that "inclusive leadership falls squarely in the relationship-based process and follower focused, less dominant way of leadership thinking" (p. 303). From a POS lens, Wooten (2006) concluded that a systems approach can nurture "divergent perspectives, ideas, and individuals in the workplace" and lead to "productive and meaningful human-centered interactions" with the potential to foster productivity in organizations (p. 164). These indications that collective approaches offer an impactful alternative to entity-based leadership styles, raise the question of "how is it feasible?"

McCauley's (2014) perspective on taking a whole system or collective lens helps to clarify some of the ambiguity that comes with developing practices to support collectives such as teams, levels, and functions. She posited the necessity of leveraging direction, alignment, and commitment (DAC) as a vehicle for leading with a collective focus, which helps to operationalize the relational and participative practices that are fostered by inclusive leaders. Key components to the model include:

- Agreement on what the collective is trying to achieve together (Direction).
- Effective coordination and integration of the different aspects of work so that it fits together in service of the shared direction (Alignment).
- People who are making the success of the collective (not just their individual success) a personal priority (Commitment). (McCauley, 2014, p. 1)

This model demonstrates how an inclusive organization that has shifted away from traditional power structures can productively plan and execute workflows in a collective manner. Specifically, it addresses the multi-faceted work necessary when employing a systems lens as it enables the balancing of human, technical, and structural elements relevant to organizational success. This model aligns a collective approach with organizational essentials such as structure, systems, strategies, practices, and culture (Booyesen, 2014). An inclusive organization will engage collaboration from across levels in these areas which fosters the participation, ownership, and commitment necessary for executing on workflows associated with the shared direction. Ultimately, emphasis is on the collective rather than the individual. In this vein, individuals and groups are not operating in silos or competing but rather working together towards common goals that benefit individuals, units, and the organization as a whole. This demonstrates how leaders can leverage a collective stance to evolve inclusion.

As seen in Table 2.3, engaging in a whole system approach and espousing inclusive leader attributes tends to be less common in traditional organizational settings. This is not surprising as most leaders and organizational members are socialized within systems espousing individuality that are primarily “direct and tell” in nature, and that type of environment stunts learning and the advancement of inclusion practices. This parallels to the overarching theme in RCT and how it identifies systemic power as an impediment to organizations, and acknowledges this is developed and reinforced at different levels reaching all the way to societal influences (Fletcher & Raggins, 2007, p. 376). This points to the importance of developing germane capabilities in leaders to help them optimize inclusion within organizational settings. Scholarly discussions in this area suggest the abilities associated with boundary spanning and global mindsets are key skills leveraged by inclusive leaders.

Boundary spanning. Chrobot-Mason et al. (2016) asserted boundary spanning is an essential skill for establishing the collaboration necessary to address the complicated issues faced by organizations today. Specifically, “a boundary spanning mindset consists of 1) a cognitive capacity to mobilize the interaction of groups to resolve wicked problems, and 2) a motivation to improve intergroup interactions” (p. 106). Converse to bounded mindsets where leaders bind people to common identities, a boundary spanning mindset aims to bridge interaction among groups as a vehicle for overcoming ambiguous and challenging circumstances. By engaging the diverse talents within an organization, boundary spanners can stimulate creative outcomes for the most complex issues. This ability to bridge unique (and even competing) individuals and groups is indicative of an inclusive leader attribute as it

builds collaboration through relational practice and holds the capacity to discourage silos by way of a collective approach (Booyesen, 2016; Chrobot-Mason et al., 2016).

Global mindsets. Booyesen's (2016) description of the global mindset outlined it as one that can embrace tensions by leveraging competencies in areas such as cognitive complexity, change-orientation, and other key social skills conducive to building relationships and social capital. More specifically, a global mindset can be characterized by an "ability to deal with the complexity, ambiguity, and polarities of cultures and sub-cultures without being paralyzed, intimidated, or frustrated by the differences" (Booyesen, 2016, p. 18). It supports the need to balance human needs of both belonging and uniqueness as outlined in the social identity and optimal distinctiveness theories.

Inclusive leadership requires a versatile skillset to support practices that are relational, communicative, and participative in nature; one of which is the ability to engage in a whole system stance as supported by these descriptions of boundary spanning and global mindset capabilities. The collective approach has relevance to how leaders help shape work environments that are conducive to inclusion, and this points to the importance of examining how the phenomena of inclusion interplays with aspects of organizational culture and climate as these areas (Gallegos, 2014).

Organizational Cultures and Climates¹ of Inclusion

Understanding how culture and climate impact the individual and collective behaviors within the workplace context is an important component to a study on inclusion. Scholars ascertain the inclusion construct is relational, processual, and

¹ In this dissertation, organizational culture and organizational climate are to be inferred when the terms culture and climate are used.

contextual in nature, and that inclusion occurs by harmonizing leader/follower and in/out group behaviors with the organization's goals in an infinite cycle of learning, collaboration, and work flow which heightens the organization's awareness and commitment to a community built on inclusion (Ferdman & Deane, 2014).

Distinguishing culture and climate. Culture and climate constructs have traditionally been examined separately in scholarship yet they both truly contribute to understanding how contextual dynamics impact organizational behavior, change, and outcomes. Formal distinctions of culture and climate are in evidence within the literature although these terms are often confused and used synonymously to describe organizational environments. The literature review exposed frequency in the interchangeable use of culture and climate. Using these terms indiscriminately is problematic as it fails to account for the distinguishing characteristics of the two constructs; specifically, how each contributes to the internal context of an organization. Scholars have distinguished the two constructs describing culture as typically stable in nature, due to a network of practices established over time, and climate as more prone to change as it hinges on perception of leadership style and administrative policy (Ozcelik, Langton, & Aldrich, 2008). According to Cameron and Quinn (2011), culture relates to slow-changing, less discernable and sometimes invisible core organizational attributes that can be consensual interpretations of how things are done within an organization; climate, on the other hand, encompasses more quickly changing and dramatic employee perceptions depicting observable characteristics that involve individual attitudes which are situational in nature (Cameron & Quinn, 2011). Erhart et al. (2014) have outlined some key differentiators of culture and climate:

- Theoretical roots and methodology, with climate emerging from psychology and its focus on attitude surveys and culture from anthropology with its focus on case/qualitative studies
- Breadth with which the constructs are operationalized, with culture including more levels of inferred and observable variables and climate focusing on the observables almost exclusively
- Awareness of the culture/climate by employees in the organization; culture has different levels with the deepest levels below consciousness, whereas for climate, the variables are observables
- Malleability, or the relative ease with which climate might be changeable compared to the difficulties inherent in changing many levels of culture
- The strategic focus on climate research, with much less evidence for such a focus in culture literature. (Erhart et al., 2014, p. 204)

While scholars tend to emphasize the differences associated with culture and climate, my intention is to focus on their likenesses and how they interrelate as these constructs carry the potential to be complementary in nature. Erhard et al. (2014) further describe similarities in climate and culture research:

- The focus on a *macro view* of the organizational context and attempts to understand how that context emerges as it is for the participants there
- The focus on the *context* in which people work rather than on the individual attributes of people there
- The focus on *sharedness* of experiences of people rather than the individual differences among them
- The centrality of the *meaning* of the context for people and their subsequent behavior
- The role of *leaders and leadership* in creating the context and the meaning attached to it
- The issues of *strength and alignment* as important in understanding climate and culture effects
- The relationship of climate and culture to *organizational effectiveness*. (p. 198)

The likenesses associated with culture and climate can potentially inform the inclusion construct as there is alignment with the focus on (a) a collective; (b) how members experience things together (sharedness vs differences); (c) how leaders play

a role in developing organizational context; and (d) how alignment is pivotal to organizational effectiveness. Drawing from POS and inclusion literature, one can surmise that organizations benefiting from inclusive leadership with a strong commitment to positive communication, relational practice, and participative approaches will evidence climates and cultures that are diverse, interdependent, and stimulating in nature with generative potential as represented in Figure 2.1. This model helps to illustrate how inclusive leadership stimulates positive climates within an organization.

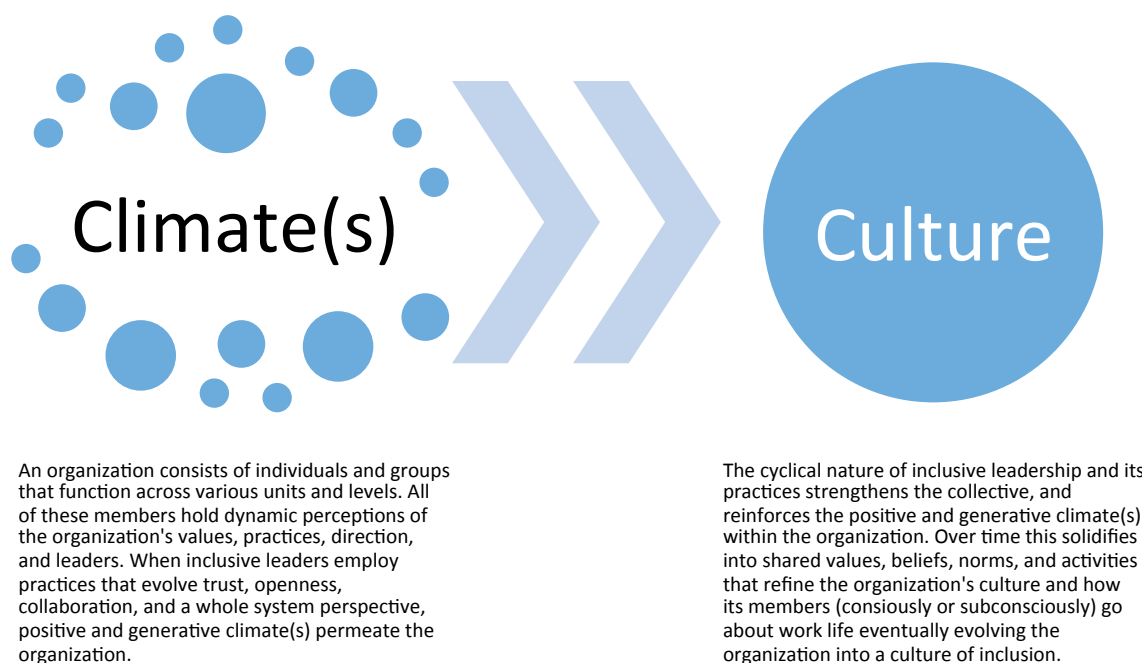


Figure 2.1. Climate and culture as complementary components to inclusion.

The cyclical nature of inclusion and the organization's inclusive practices eventually permeate the organization's foundation, which in turn matures and evolves the organization's core beliefs, norms, values, and activities to become inclusive in nature.

Culture and climate scholars (Ehrhart et al., 2014) acknowledge that research to date has taken a silo approach and profess a need to further understand the

relationship between these two constructs. This ongoing dialog between culture and climate researchers detail a gap in scholarship which affords an opportunity to examine how culture and climate bridge together in healthy, successful contexts. This study contributes to knowledge in this area as it considers the collective and fluid aspects that define inclusive organizations. The current research developed in culture and climate scholarship offers relevant findings that help to unveil how each construct is instrumental in the cycle of advancing values and behaviors that develop inclusion.

Culture. Organizational culture has often been informally described as the values and norms that help to influence the way things are done in an organization (Frontiera, 2010; Glisson & James, 2002; Schein, 2010). Schein (2010) acknowledged that while not as difficult to study as societies in the anthropological context, organizational culture is similar in that it is not easily understood by its members because there are invisible elements of culture that are often taken for granted. He defined organizational culture as:

The pattern of basic assumptions which a given group has invented, discovered, or developed in learning to cope with its problems of external adaptation and internal integration, which have worked well enough to be considered valid, and therefore, to be taught to new members as the correct way to perceive, think, and feel in relation to those problems. (Schein, 1992, p. 9)

A range of other organizational culture definitions have been generated over the years (see Table 2.4). Key themes in these definitions highlight how culture is related to the values, beliefs, and norms that shape and reinforce workplace interactions and activities whether visible or invisible to members.

Table 2.4

Organizational Culture Definition Variations

Definitions	Source
Culture refers to the deep structure of organizations, which is rooted in the values, beliefs, and assumptions held by organizational members. Meaning is established through socialization to a variety of identity groups that converge in the workplace.	Denison, 1996, p. 624
Culture represents an interdependent set of values and ways of behaving that are common in a community and that tend to perpetuate themselves, sometimes over long periods of time. This continuity is the product of a variety of social forces that are frequently subtle, bordering on invisible, through which people learn a group's norms and values, are rewarded when they accept and learn them, and are ostracized when they do not.	Kotter and Heskett, 1992, p. 142
Organizational culture is reflected by what is valued, the dominant leadership styles, the language and symbols, the procedures and routines, and the definitions of success that make an organization unique.	Cameron and Quinn, 2011, pp. 22, 52–54
Patterns of shared beliefs, values, and expectations that define and shape a group's behaviors.	Jaskyte, 2010, p. 424
Shared meaning organizational members attach to the events, policies, practices, and procedures they experience and the behaviors they see being rewarded, supported, and expected.	Ehrhart et al., 2014, p. 2
Company culture is manifested in the values and business principles that management preaches and practices, in employees' attitudes and behavior, in the legends people repeat about happenings in the organization. . . The core of culture is formed by values which are not visible but shared by people even when membership in group changes.	Sharma and Sharma, 2010, p. 98

My review of organizational culture literature demonstrated how leadership and culture interact in a multitude of ways to impact organizational contexts and member behaviors which suggests the importance of developing inclusive leadership to foster inclusive cultures. Research has demonstrated that encouraging positive behaviors and relationships shaped by participative and change-focused contexts has enhanced organizational behaviors and outcomes. In contrast, workplace contexts that are rigid,

resistant, and stressful in nature, have produced lower levels of proficiency, engagement, and functionality (Wolf, Dulmus, Maguin, & Cristalli, 2014).

These empirical findings from culture research validate the potential of inclusive organizations. Jaskyte's (2010) quantitative study examined correlates of organizational culture in a U.S. non-profit organization. The researcher sampled 910 employees across 34 southeastern locations to explore culture and other organizational variables such as leadership and centralization. The findings evidenced that highly centralized, exclusive cultures afford employees little involvement in decision-making in processes and changes which discourages emphasis on employee well-being, innovation, and outcome orientations. Frontiera (2010) used semi-intensive interviews with a sampling of six leaders who had fostered successful organizational change in professional sports organizations in the United States. This qualitative study was designed to explore leadership and culture, and the researcher's findings demonstrated that dysfunctional and negative cultures void of inclusion can lead to attitudes and values that reflect the acceptance of mediocrity, bad decision-making, minimal accountability, and the absence of values such as trust, honesty, and integrity. Sharma and Sharma's (2010) quantitative study used a questionnaire to sample 300 employees across different departments (finance, human resources, sales, finance, etc.) in a North Indian textile organization to examine the relationship between culture and leadership. Their study established that characteristics of accountability, collaboration, decentralized leadership, alignment, and adaptability are instrumental to organizational success in today's rapidly changing global environment.

Empirical findings that further established positive links with leadership, culture, and climate as well came out of Glisson and James' (2002) quantitative study on child welfare and juvenile justice case management teams. Sampling 282 U.S. case managers across 30 counties in one southeastern state, their work uncovered:

More constructive team cultures were associated with more positive work attitudes, higher service quality, and less turnover. In addition, more positive team climates (less depersonalization, emotional exhaustion, and role conflict) were associated with more positive individual work attitudes. (Glisson & James, 2002, p. 788)

Interestingly, this is one of few empirical studies that has examined both culture and climate with findings that touch on how culture and climate can be complementary.

MacNeil, Prater, and Busch's study (2009) also aimed to assess culture and climate within the context of one study. Their research focused on exceptional learning outcomes and the relationship to school culture (shared norms) and climate (shared perceptions) in a Texan school district. They sampled 29 suburban schools to examine the test results of 24,684 students and surveys of from 1,727 teachers. They hypothesized that schools that build strong cultures experience higher levels of teacher motivation, and confirmed findings that schools with high student learning outcomes possessed healthier school contexts that included a strong goal focus, fostered support structures, and encouraged adaptation climates. While the test scores and teacher perceptions substantiated a correlation with climate, the findings are not necessarily indicative of a positive relationship to culture as there are limits to a quantitative study that does not encompass a broader sample of school personnel. My impression was that this study illustrated an instance where culture and climate were not conceptually delineated throughout the research process. That said, the study presents an

opportunity as future research that could expand on these findings by further exploring some of the participant schools' cultures with a different research method.

There are many studies in the area of culture that have evidenced how school environments are conducive to inclusion and inclusive leadership. A multiple case study involving two ethnically-diverse English schools, which were nationally recognized for innovation projects and improvements, examined values that help to build positive school cultures. These researchers uncovered strong levels of commitment and respect amongst employees, students, and families, noting these evolved from the ethical leadership and positive values embraced by the school heads. The findings attributed success to school cultures which placed strong value on people with themes of nurturing and collaboration (Lance, 2010). Wu, Hoy, and Tarter's (2013) quantitative study sampled over 1,500 teachers in 103 Taiwanese public elementary schools to examine the relationship between a culture of academic optimism and student achievement enhanced by enabling school structure and collective responsibility. The findings suggested that when teachers view leadership and school structure as helpful and positive, a culture of trust and efficacy emerges which leads to motivation and improved outcomes. Eilers and Camacho's (2007) mixed method study, involving case study and survey methods, highlighted how collaborative leadership styles impacted performance outcomes in a school that was listed as not achieving annual progress for three consecutive years. The principal modeled collaboration in areas such as learning and resource utilization, eventually effected culture change as evidenced with enhanced teacher professionalism and school collaboration, which was linked to student outcome improvements on statewide assessments.

The key themes from culture scholarship that support the fundamentals of inclusion included research that evidenced the value of flatter hierarchies, change orientations, values foci, and participative settings. Research conducted in school settings reflected many of these attributes, and these align with inclusive leadership. This parallels how cultures of inclusion are characterized “as institutionalized by weaving inclusion into the everyday operation and fabric of the organization through translating the values of inclusion into its mission, vision, strategies, policies, structures, and processes as well as leadership practices” (Booyesen, 2014, p. 308). Again, this illustrates the importance of a whole system perspective with healthy relational practices to balance the needs of individuals, groups, and the organization.

Climate. In laymen’s terms climate has been described as how employees perceive their work environments, how well they can do their jobs, and “how it feels to work in a particular environment and for a particular boss” (Watkin & Hubbard, 2003, p. 380). Climate has been tied to how employees make meaning of organizational policies, practices, and procedures along with their perceptions of how they are rewarded and supported (Schneider, 1990). Others refer to climate as an abstraction that represents organizational members’ cognitive perceptions of how they experience work (Ehrhart et al., 2014). It can be summarized that climate relates to worker perceptions and how the workplace environment impacts these organizational members which can impact outcomes such as job satisfaction, morale, and performance (Ehrhart et al., 2014; Glisson & James, 2002).

Considering predictors of climate strength, Ehrhart et al. (2014) highlighted how recent climate research has found strong, positive climates to be associated with

smaller, cohesive, and tenured work units exemplifying characteristics such as high levels of sense-making, dense social networks, and inter-unit social interaction and interdependence. Additionally, the leadership styles in strong climates demonstrated the sharing of high level information and consistency in leader behavior, which parallels to contexts found within inclusive organizations (Ehrhart et al., 2014). Conversely, Watkin and Hubbard (2003) reviewed 35 years' worth of research from the consulting field and found conditions of negative work climates to exhibit characteristics such as inflexibility, indecisiveness, and arbitrary policies and procedures. They identified warning signs of negative or deteriorating climates to involve indicators such as:

- A focus on task delegation and micromanagement,
- Punishment for discretionary judgment,
- Unrealistic or unchallenging goals,
- Mismatched expectations and capabilities,
- Consistent missing of organizational goals,
- Vague and untimely performance feedback,
- Lack of clarity with managers' expectations,
- Insufficient feedback and rewards based on different levels of performance,
- Lack of clarity with how to operationalize organizational vision and strategy,
- Frequent changing of priorities and reversing of decisions, and
- Lack of accountability amongst team members.

These factors signal behaviors contrary to those found in inclusive climates which Nishii and Rich (2014) described as insuring a fair playing field, developing ways

for organizational members to make meaningful human connections, and facilitating avenues for participative decision making.

In reviewing the literature on climate, several studies demonstrated how it can be a differentiator with work performance at the individual and unit levels as it can stimulate energizing work environments for employees (Watkin & Hubbard, 2003). Exemplifying this, Koene, Vogelaar, and Soeters' study (2002) of 50 stores in a Netherlands supermarket chain demonstrated a positive correlation with the effect of climate on financial performance in small stores. In this case, 2,156 employees completed a questionnaire to measure leadership and store climate. The findings in this quantitative study illustrated employees were more aware of organizational objectives and took responsibility to counter waste which led to increased profitability. In addition, the study evidenced that local managers who employed consideration by offering support, inspiration, and encouragement to employees, could achieve improved results as well as job satisfaction and morale (Koene et al., 2002). This study established that empowering and nurturing climates can impact unit performance which echoes values embraced by inclusive leaders. The culture and climate scholarship affords insights into how organizational contexts can be shaped. It is suggestive that the development of inclusive workplace environments requires an evolving commitment by the collective to practices of inclusion.

Inclusion Practices

Scholars have described the practice of inclusion as what leaders, employees, and organizations do to foster work activities and relationship experiences that are inclusive in nature (Ferdman & Deane, 2014). Ferdman (2014) suggested "inclusion is a

practice—an interacting set of structures, values, norms, group and organizational climates, and individual and collective behaviors, all connected with inclusion experiences in a mutually reinforcing and dynamic system” (p. 16). Inclusive flows across multiple levels in an organization as demonstrated with the following examples of inclusive practices (Ferdman, 2014):

- Individuals are understanding and respectful of different perspectives.
- Groups have norms that support collaboration, conflict resolution, and giving voice to all members.
- Leaders insure alignment with the organization’s direction, behaviors, and values, and, employ high levels of accountability evenly.

When inclusive practices are evident in organizations there is openness, trust, safe voice channels, high quality communication, and relationship-building to establish meaningful human connection. The scholarship illuminates how intentional practices of inclusion can influence organizational behaviors and relationships in a positive manner ultimately impacting whole systems to be inclusive. Numerous studies have validated this with findings that establish openness, participation, and caring as generative for organizations because these foster employee voice, decision-making, experimentation, and risk-taking which in turn can result in increased employee engagement, commitment, collaboration, and motivation (Jaskyte, 2010; Ozcelik et al., 2008).

Employee voice and participation. A long history of research has substantiated the benefits of employee voice which are congruous to those emphasized in POS and inclusion scholarship (See Table 2.5). It has been established that open and participative environments can encourage employees to express view points on work

functions as well as engage them in decision-making and change processes (de Poel, Stoker, & van der Zee, 2012).

Table 2.5

Employee Voice Benefits

Employee Voice Benefits	Source
<ul style="list-style-type: none"> Facilitates worker autonomy and subordinate individuality 	Gorden, Infante, and Graham (1988)
<ul style="list-style-type: none"> Results in proactive, prosocial behaviors leading to collaboration and change focused behaviors; increase employees' sense of value, work satisfaction, and motivation 	Bashshur and Burak (2015)
<ul style="list-style-type: none"> Fosters organizational learning that builds competitive advantage, adaptability, and change 	Levine (2001)
<ul style="list-style-type: none"> Heightens the flow of information to drive important company decision 	Milliken and Morrison (2003)
<ul style="list-style-type: none"> Strengthens employee relationships with management, amplifies engagement, and results in business gains 	Syed (2014)
<ul style="list-style-type: none"> Enhances human connection and involvement at multiple levels 	Schor (1994)

Based on extensive consulting and research experience, Nishii and Rich (2014)

added further dimension to establishing safe spaces for employee voice and participation advocating:

Managers can create a climate in which employees are willing to provide their thoughts and ideas about critical work processes by (1) providing multiple channels for upward communication, (2) making a concerted effort to seek informal feedback from employees, (3) being open to alternative ideas about how to go about the organization's work, and (4) actually incorporating the information that they receive into decision making whenever appropriate. (p. 336)

Creating safe spaces for employees is necessary for this, and by doing so employees are more apt to engage in expression and innovation without fear of repercussions (Kahn, 1990).

A study on employees at Dutch temporary work agencies demonstrated the importance of fostering voice and participation. Quantitative in nature, this research was based on the data collected from 258 employee questionnaires. It revealed how work settings that encouraged voice and participation led to environments where employees had the freedom to reflect and think about work processes and collaborate on new ideas and procedures (de Poel et al., 2012). Fernandez and Moldogaziev's (2015) survey study conducted with over 500,000 U.S. federal employees using the Federal Employee Viewpoint Survey (FEVS) described empowerment practices as the provision of information and allowing employees to effect change in the workplace. Their findings suggested empowerment positively impacts employee job satisfaction. Conversely, Dust, Resick, and Mawritz's (2014) research illustrated how rigid organizational structures with centralized decision-making processes minimized employee empowerment and negatively impacted their work experiences. These researchers sampled 306 individuals that represented 153 employee-supervisor matched pairs from different industries across the northeastern United States. The results demonstrated a link between leadership, organizational structure, and employee job-related behaviors. Mechanistic work contexts were described as constraining systems whereas more organic workplaces were empowering environments. The characteristics of mechanistic structures had centralized decision-making, roles within a hierarchy, downward communication trends, behaviors guided by formal policies and procedures, and priorities to gain operating efficiencies; organic structures had flatter hierarchies, reciprocal communication patterns, adaptability to environmental conditions, and behaviors guided by shared values (Burns & Stalker, 1961; Dust et al., 2014).

The research supports the premise that highly centralized workplaces are not conducive to fostering the inclusion practices that encourage employee voice and participation, which ultimately incentivize employees to engage and take initiative (Dust et al., 2014). Instead, empowerment “conceptualized as a multi-faceted approach composed of various practices, aimed at sharing information, resources, rewards, and authority with lower level employees” is synergistic with inclusive approaches (Fernandez & Moldogaziev, 2015, p. 375). The literature evidenced the practice of empowering employee voice and participation is necessary to shaping an inclusive context, and has been correlated to positive work outcomes where employees are “physically, cognitively, and emotionally engaged in their task environment” (Ozcelik et al., 2008, p. 191).

High quality communication and relationships. Building on the necessity of employee voice channels and the importance of making expression safe as well as receiving it authentically, Schein (2010) emphasized how easily recipients of communication can be influenced positively or negatively which ultimately demonstrates the sensitive and dynamic nature of human interactions. Specifying that “good relations and reliable communications across hierarchic boundaries are crucial” (p. 2), he advocated the need for open, safe work contexts that foster trust through the art of humble inquiry. The notion of humble inquiry is defined as “the fine art of drawing someone out, of asking questions to which you do not already know the answer, of building a relationship based on curiosity and interest in the other person” (p. 2). The inclusive behavior Schein referenced is not necessarily intuitive to leaders in traditional western organizations; yet, there is immense value in leveraging humble inquiry to

develop effective communication and quality relationships as it encourages safe contexts for employee voice and participation in decision-making which is necessary for fostering contexts of inclusion. Dutton and Heaphy (2003) extended thinking on high quality communication and relationships noting how emphasis on high quality connections (HQC) is a powerful reinforcement to the dynamic and processual forces that evolve in positive organizations. They recognized the importance of understanding the quality of connections in organizations as a vehicle for unpacking how to “build contexts that enable human flourishing” (p. 263) and how such connections ultimately impact the work and outcomes of organizations. They eloquently described quality of connection as determined by “the connective tissue” (p. 263) between people, which they characterized as being either “life-giving or life-depleting” (p. 263). These aspects of high-quality connections align with how inclusive leadership encourages practices that are relational and communicative in nature.

Elevating the quality of human connection, interactions, and communication in organizations requires openness, reflection, and learning. The focus on such skills amongst organizational members can build value in uniqueness while fostering collaboration and solutions-focused employees and teams, and this premise is evidenced across the literatures. As postulated by Shore et al. (2011), the development of high quality relationships can elevate job satisfaction, performance, creativity, commitment, well-being, and citizenship behaviors. Such manifestations of high quality communication can also result in stronger relationships and leadership development which are advanced by shared goals, shared knowledge, and mutual respect

demonstrating the critical nature of communication to relationships (Cameron, Dutton, & Quinn, 2003).

Browning et al.'s (2012) work, mentioned earlier for its emphasis on positive communication, advocated that integrative communication, which includes inclusiveness, respectfulness, and supportiveness can be fostered with activities such as information sharing, open dialogs, and generating engagement and workplace democracy; and that constructive interaction, which involves solutions-focus, future orientation, and collaboration, can be fostered through conversation techniques designed to involve employees in improving the organization. The dynamics associated with positive communication and humble inquiry capture the essence of an inclusive practice as both encourage patterns of relational practice that are salient in terms of reinforcing contexts of inclusion. Inclusive practices of openness, participation, high-quality communication, and relationship-building are fundamental premises that support the process of inclusion.

Summary and Model

This multi-disciplinary literature review offers perspective on the wide range of interrelated factors that delineate the construct of inclusion. Scholars have acknowledged the need to expand research to deepen understanding of the social processes surrounding inclusive leadership, which has been the grounding and inspiration for my dissertation research. The scholarship raised several key premises that are relevant to inclusive leadership and how it cultivates inclusive contexts in organizations. These include:

- Flatter, less rigid hierarchies to maximize inclusion and participation for all organizational members;
- Safe voice channels for all individuals and levels/groups/functions to foster input and action;
- Participative practices to engage employees in decision-making and change processes;
- Relational practices to support high-quality communication and relationship building within and across organizational units;
- Values systems associated with ethics of caring and support to reinforce strong human connections while embracing uniqueness as an asset;
- A cycle of learning and development for all organizational members.

Based on this literature review, my assessment is that these guiding themes evidence how inclusive leadership shapes organizational climate and culture to be inclusion-oriented; and, this has served as the catalyst for the development of the Inclusion Triad model in Figure 2.2.

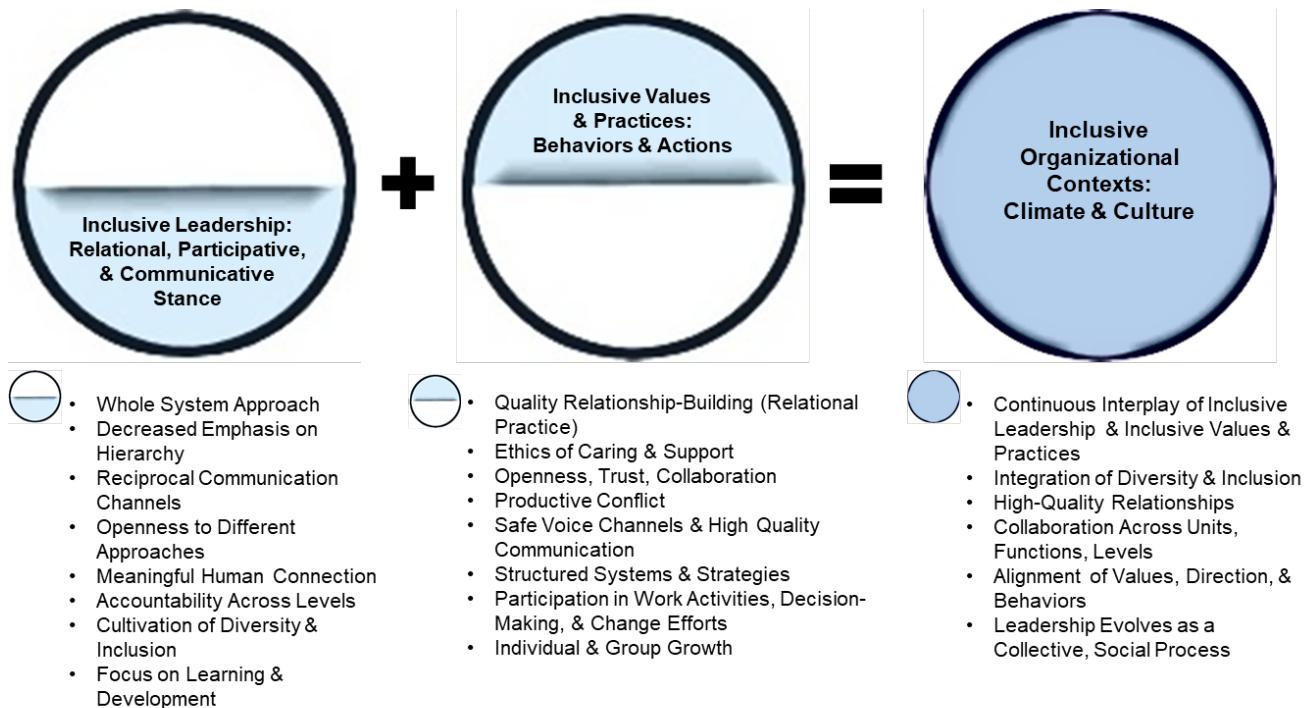


Figure 2.2. The Inclusion Triad: How does inclusive leadership stimulate climates and cultures of inclusion?

This model represents my understanding of how inclusive leadership stimulates climates and cultures of inclusion. The inclusion triad diagram in Figure 2.2 illustrates how inclusive leadership, inclusive values and practices, and inclusive contexts are key interplaying dynamics within an organization; each one reinforcing the other to foster inclusion. Respectively, inclusive leadership is relational, participative, and communicative in its approach, which mobilizes the behaviors and actions of organizational members towards inclusive values and practices. Inclusive leadership's collective focus serves as an impetus for generating positive climates as it places value on both belonging and uniqueness of all individuals and groups. These contexts are productive in nature, and encourage continued engagement in inclusive behaviors and actions establishing positive momentum inside the organization. This cycle continues to

heighten the members' commitment to inclusive practices and values, and over time, these embed within the organization's culture becoming representative of its norms, values, and beliefs. In this manner, inclusive leadership stimulates contexts that are definitive of inclusive climates and cultures.

In conclusion, this chapter's review of scholarship reveals the complexities associated with the inclusion construct. It focuses on the disciplines of diversity and inclusion, POS, organizational culture and climate, and areas of organizational behavior. The literature evidences the enigmatic nature of the social processes that delineate inclusive leadership, inclusion practices, and cultures and climates of inclusion. This was instrumental in the formulation of my research method and design for this dissertation which is outlined in Chapter III.

Chapter III: Methodology

Chapter II's literature review revealed inclusion has commonly been viewed in conjunction with diversity. Today, scholars acknowledge the need to examine inclusion more closely as new findings in this area could have positive implications for both scholarship and practice. The literature also uncovered that inclusive leadership is processual, contextual, and relational in nature (Booyesen, 2014), which varies significantly from the traditional, entity-based leadership styles that are prominent in current scholarship. Specifically, inclusive leadership involves organizational members in an ongoing cycle of participation and development that emphasizes inclusion to eliminate exclusion. This continuous process unites members in a shared direction embracing principles of inclusion and, simultaneously, insures clear alignment with organizational strategy, policies, practices, and activities. My research was designed to facilitate the exploration of social processes that evolve at different levels within a system with inclusive leadership. The aim of this qualitative study was to learn about people's lived experiences within the context of an organization with inclusive leadership.

Understanding the social phenomenon of what is happening when inclusive leadership is present in an organization requires a methodology that explores and emphasizes peoples' experiences. My dissertation research design employed a multiple method approach to learn how members of an organization experience the social processes that evolve from inclusive leadership. There was a high level of intricacy with the research design as it involved a single exploratory critical case study and grounded

theory to examine inclusive leadership. This chapter outlines the methodological components essential to both areas of the study. The sections to follow include:

- a description of the epistemological grounding associated with this research;
- an overview of case study with the history of grounded theory;
- specifics on the rationale, design, and processes;
- descriptions of Phase I (case) and Phase II (GTM) participant sampling, data collection, and data management;
- a review of GTM practices;
- triangulation; and
- ethical considerations.

The discussion include background information on the participants' organizations. Data analysis processes are only previewed as these will be covered in later chapters.

Interpretivist and Constructivist Paradigms

The use of an exploratory critical case study and GTM is a qualitative research design, and as articulated by Creswell (2014) "those who engage in this form of inquiry support a way of looking at research that honors an inductive style, a focus on individual meaning, and the importance of rendering the complexity of the situation" (p. 4). In this vein, my research is positioned within the interpretivist and constructivist paradigms where realities are seen as human constructions, multiple and fluid in nature and co-constructed in interaction. Countering traditions of positivism that seek causality, interpretivist thinking (Charmaz, 2014) focuses on how meaning is constructed of social interactions; specifically, "this type of theory assumes emergent, multiple realities;

indeterminacy; facts and values as inextricably linked; truth as provisional; and social life as processual” (p. 231). The interpretivist viewpoint acknowledges how both researchers and participants interpret actions affirming a stance that researchers are involved in the process of making meaning of social phenomena.

Complementing this, the constructivist worldview recognizes that researchers aim to understand how people make meaning of things and achieve this through inductive research processes (Creswell, 2014). Charmaz (2014) described the perspective of constructivism as one that “brings subjectivity into view and assumes that people, including researchers, construct the realities in which they participate . . . constructivists acknowledge that their interpretation of studied phenomenon is itself a construction” (p. 342). The constructivist epistemology allows a researcher to shift from a positivist mindset—which ascertains universal truths can be observed, measured, predicted, and controlled in the domain of research (Rubin & Rubin, 2012)—to researching from an approach that can foster an understanding of complex social constructions. Both the interpretivist and constructivist epistemologies are supportive of the vantage point from which this study is positioned. As professed by Lincoln and Guba (1986):

There is no single reality on which inquiry may converge, but rather there are multiple realities that are socially constructed . . . These multiple and constructed realities cannot be studied in pieces (as variables, for example) but only holistically, since the pieces are interrelated in such a way as to influence all other pieces. Moreover, the pieces are themselves sharply influenced by the nature of the immediate context. (p. 75)

These paradigmatic perspectives are central to the epistemological grounding of my dissertation research. The research methodologies I employed in this study are exploratory critical case study and grounded theory. Case study is established as a

well-known method for qualitative inquiry while GTM remains a newer option for researchers interested in understanding human social phenomenon. The next sections include a brief overview of case study and an in-depth review of grounded theory's evolution.

Case Study

Johnson and Christensen (2008) described case study as “a form of qualitative research that is focused on providing a detailed account of one or more cases” (p. 395). The use of this approach has aided researchers in understanding cases across disciplines in areas such as law, business, medicine, and social sciences. While there are varying perspectives on this method, case study researchers align in their focus on collecting qualitative data pertaining to the context of one or more cases. The notion that a case is a bounded system helps to delineate the value of case study approach as it serves as a vehicle for understanding what is happening in a contained system.

Specifically:

A system is a set of interrelated elements that form an organizational whole. Using the system metaphor, cases are seen as holistic entities that have parts and that act or operate in their environments. Bounded is added to emphasize that you should identify the outline or boundaries of the system. (Johnson & Christensen, 2008, p. 395)

This description of case study and the concept of boundedness is enhanced by how Stake (1995) noted that a case study is “a choice of what is to be studied” (p. 435), and Yin's (2014) positioning of it as relevant when “you want to understand a real-world case and assure that such an understanding is likely to involve important contextual conditions pertinent to your case” (p. 16). In this vein, a case study is befitting for an approach to understanding inclusive leadership. Yin (2014) states: “A case study allows investigators to focus on a ‘case’ and return a holistic and real-world perspective such

as studying individual life cycles, small group behaviors, organizational and managerial processes” (p. 4). This illustrates why the case study approach is especially relevant to my research as it has potential for fostering knowledge to be built upon.

Employing the critical case study approach (Yin, 2014) was important because the selection of the Loma School District² was critical to understanding aspects of inclusive leadership within the context of a single organization. The relevance of the critical case study approach to this research is that the case was related to theoretical aspects of inclusion, which were of interest in this research. More specifically, this case was critical to understanding the social processes associated with inclusive leadership, and there was no intention of establishing generalizability.

Grounded Theory

Grounded theory has roots in early philosophical thinking associated with pragmatism and symbolic interactionism. Both schools of thought raised awareness of the need to expand methodological avenues for exploring human social phenomena and this seeded the growth of grounded theory.

Pragmatism. Originating in the American philosophical tradition, pragmatism was concerned with human nature and its ability to be both active and creative denoting that “meanings emerge through practical actions to solve problems and through actions people come to know the world” (Charmaz & Bryant, 2007, p. 609). Acknowledged as a key contributor to pragmatism and social psychology, George Herbert Mead (1934) enriched the philosophical landscape of his time with observations on the human mind, self, and society. While critics pointed to how it was “difficult to cast his general

² A pseudonym is used for the name of the school district throughout this study.

statements into operational forms so that they can be tested” (Strauss & Mead, 1956, p. xvi), Mead’s concepts helped to set the stage for divergence away from the prominent psychological theories of the time that informed positivist thinking. Mead’s emphasis was on understanding how individuals impact interactions with others. The sociological nature of this differed from the theories that examined the specifics to individuals such as psychological traits and personality development. Themes in his teachings offered depth into how humans interacted within social realms, and his revelations on pragmatism pointed to how humans affect their social worlds because they are sentient, acting beings (Strauss & Mead, 1956, p. x). Mead surmised that “action [“the act”] determines the relation between the individual and the environment . . . because the act mediates between organism and environment, the future is always to some extent uncertain” (Strauss & Mead, 1956, pp. xi–xii). Mead’s assessment of human behavior and the environment raised the relevance of reflexivity and social processes. These observations became the basis for symbolic interactionism, and eventually this focus on human action and social processes would drive the development of grounded theory.

Symbolic interactionism. As Mead’s pupil, Herbert Blumer was instrumental in furthering the concept of symbolic interactionism, which focused on the relationship between meaning and action (Blumer, 1969; Charmaz & Bryant, 2007). He posited: “human beings are seen as living in the world of meaningful objects—not in an environment of stimuli or self-constituted entities. This world is socially produced in that meanings are fabricated through the process of social interaction” (Blumer, 1969, p. 69).

More simply put, “people construct selves, society, and reality through interaction”

(Charmaz & Bryant, 2007, p. 610). Blumer (1969) described:

The meaning of a thing for a person grows out of the ways in which the other persons act toward the person with regard to the thing. Their actions operate to define the thing for the person. Thus, symbolic interactionism sees meanings as social products, as creations that are formed in and through the defining activities of people as they interact. (p. 5)

Blumer’s (1969) assessments of symbolic interactionism and Mead’s insights on pragmatism foreshadowed the development of grounded theory. Their work was foundational to what Glaser and Strauss (1967) would eventually articulate as a need for researchers to understand “what’s happening?” in human social processes (Glaser & Strauss, 1967; Morse et al., 2009). To explore such social phenomena required different methods of understanding, and this perspective contradicted the mainstay views of the research world at the time. Blumer (1969) advocated the need to understand the empirical world through direct study in order to generate firsthand knowledge impressing upon sociology researchers the imperative to “respect the nature of the empirical world and organize a methodological stance to reflect that respect” (p. 60). This dawned a period where pragmatism and symbolic interactionism influenced and evolved research in a direction allowing for “a greater understanding of how the world works” (Corbin & Strauss, 1998, p. 4).

At this historical juncture research was dominated by positivist methods which primarily examined how external factors impacted human behavior (Blumer, 1969).

Mid-century positivistic conceptions of scientific method and knowledge stressed objectivity, generality, replication of research, and falsification of competing hypotheses and theories. Social researchers who adopted the positivist paradigm aimed to discover causal explanations and to make predictions about an external, knowable world. Their beliefs in scientific logic, a unitary method, objectivity, and truth legitimized reducing qualities of human experience to quantifiable variables. (Charmaz, 2014, p. 6)

The prominent quantitative methods of inquiry were viewed by some of grounded theory's influencers as too mechanistic in terms of the logic surrounding observation, control, measurement and analysis of variables in human behavior (Schatzman & Strauss, 1973). These ideas stretched the paradigmatic tensions within research circles eventually leading to Glaser and Strauss' (1967) conception of grounded theory.

Grounded Theory's Evolution as a Research Method

Grounded theory's storyline presents a rather hearty portrayal of flourishing contributions to qualitative inquiry. What rose from brilliant minds that once conceived of a void in research practice has beautifully evolved in a manner that continues to raise our ability to better understand human social processes. Grounded theory has been shaped by many minds to create a versatile and rigorous method that facilitates the bridging of scholarship and practice. The emergence of GTM as a qualitative method shifted sociological research by offering a mechanism for documenting change and understanding core processes within human social life (Morse et al., 2009). Over time researchers who studied in this domain would continue to shape this methodology as it evolved into a prominent form of qualitative inquiry. Glaser and Strauss' (1967) founding work would be followed by contributions that would expand this new methodology including Strauss and Corbin (1994), Straussian grounded theory/qualitative data analysis; Bowers and Schatzman (2009), dimensional analysis, Charmaz (2006, 2008), constructivist grounded theory), and Clarke (2005), situational analysis. These approaches are reviewed in Evans (2013) and Morse et al. (2009).

Glaser and Strauss. Renowned as GTM's founding fathers, Barney Glaser and Anselm Strauss were a unique duo with diverse philosophical and research standpoints

that partnered successfully. Glaser pursued rigorous work in quantitative methods and middle range theories while Strauss focused on qualitative methods, symbolic interactionism, and social constructionism (Charmaz, 2006). As classic grounded theorists, their work together represented a special partnership reflecting how differing mindsets can align to think innovatively, and ultimately their alliance changed the landscape of qualitative inquiry.

Glaser and Strauss (1967) contended qualitative and quantitative data are instrumental for both verification and generation of theory thereby acknowledging both kinds of data sets are important. They indicated the development of GTM was to “further the systematization of the collection, coding and analysis of qualitative data for generation of theory” (Glaser & Strauss, 1967, p. 18). Their early grounded theory practices were detailed by the following characteristics:

- Simultaneous involvement in data collection and analysis;
- Constructing analytic codes and categories from data, not from preconceived logically deduced hypotheses;
- Using the constant comparison method, which involves making comparisons during each state of analysis;
- Advancing theory development during each step of data collection and analysis;
- Memo-writing to elaborate categories, specify their properties, define relationships between categories, and identify gaps;
- Sampling aimed toward theory construction (theoretical sampling), not for population representativeness;
- Conducting the literature review after developing an independent analysis. (Charmaz, 2006, p. 7)

With these practices “Glaser and Strauss aimed to move qualitative inquiry beyond descriptive studies into the realm of explanatory theoretical frameworks, thereby providing abstract, conceptual understandings of the studied phenomena” (Charmaz, 2006, p. 8). As grounded theory took root, it became a method that offered qualitative

researchers an avenue for controlling their research process which in turn enhanced the ability to engage in analytical work in the domain of social processes (Charmaz, 2006). Although Glaser and Strauss moved along different paths following their early collaboration with co-founding GTM and authoring *The Discovery of Grounded Theory* they continued to advance concepts relevant to GTM.

Glaserian/classic grounded theory. Glaser's GTM perspective was described as treating the process as a method of discovery whereby categories emerged from data (Charmaz, 2006). He "saw the need for making comparisons between data to identify, develop, and relate concepts" and moved towards clarifying the idea of theoretical sensitivity (Corbin & Strauss, 1998, p. 10). Known as *Glaserian* or *classic grounded theory*, Glaser coined new terms such as "theoretical codes, theoretical coding, and coding families to describe a process whereby analysts have a great variety of theoretical concepts at their disposal to structure the developing categories and the emerging theory" (Charmaz & Bryant, 2007, p. 198).

Straussian grounded theory. Strauss pursued other collaborations including one with Juliet Corbin. Strauss and Corbin's (1998) focus was on procedures to code and structure data through stages including open coding, axial coding, and selective coding. Also known as *Straussian grounded theory*, theirs has been termed a prescriptive approach (Evans, 2013). Some felt Strauss' lean towards the application of technical procedures in GTM deflected from the nature of the method by preventing the emergence of categories from the data (Charmaz, 2006).

Schatzman, Strauss, and Bowers: Dimensional analysis. As one of Strauss' students, Leonard Schatzman was initially impressed with GTM's constant comparative

approach (Schatzman & Strauss, 1973). Yet, as he immersed himself in the method his assessment was that it “seemed to minimize the complexity and the subtlety of analytic reasoning and failed to acknowledge the wider range of analytic processes that, in addition to comparison, were involved in analysis” (Bowers & Schatzman, 2009, pp. 90–91). Further, Schatzman acknowledged the challenges associated with the measurement of qualitative data due to varying levels of abstraction (Schatzman & Strauss, 1973). His work focused on furthering an understanding of analysis with careful attention paid to how analysis factored into the practical aspects of GTM (Schatzman & Strauss, 1973). Through the ongoing observation of his students’ struggles with analysis, Schatzman concluded that a certain type of thinking was required for analysis, and termed it “dimensionality” (Bowers & Schatzman, 2009, p. 101). He developed the idea of dimensional analysis distinguishing it as:

Committed to an expansive, early process of identifying and designating dimensions and their properties to expand the analyst’s understanding of the object of study; the relevance, complexity, and possibilities of any dimension can generally only be determined by understanding the perspective from which it is viewed. (Bowers & Schatzman, 2009, p. 95)

Dimensional analysis has been acknowledged for building transparency into the analytical realm as “it is concerned with how someone comes to ‘define the situation’ (be it researcher or informant), with making explicit the analytic processes involved in interpreting, discovering, and constructing process” (Bowers & Schatzman, 2009, p. 103).

Charmaz: Constructivist grounded theory. Kathy Charmaz (2014) refocused GTM through the constructivist lens. As a student of Glaser and Strauss, she brought forth the notion that research is constructed rather than discovered (Charmaz, 2006).

Mills, Bonner, and Francis' (2006) examination of constructivist grounded theory and human behavior in the context of both the researcher and participant further captured the essence of constructivist grounded theory by pointing out:

We do not quickly or easily reach any sort of conclusion or resolution about our own view of the nature of truth and reality. We are all influenced by our history and cultural context, which, in turn, shape our view of the world, the forces of creation, and the meaning of truth. Often these underlying assumptions about the world are unconscious and taken for granted . . . the world consists of multiple individual realities influenced by context. (p. 26)

Recognizing value in relativism and subjectivism, constructivist grounded theory rejects the idea that researchers are neutral (Charmaz, 2006).

One significant difference between the classical and constructivist grounded theory approaches is the use of literature reviews. Classical grounded theorists are proponents of consulting literature after analysis so researchers do not see data "through the lens of earlier ideas, often known as 'received theory.'" (Charmaz, 2014, p. 306)

In contrast, constructivist grounded theorists,

argue for on-going researcher familiarity with the literature of the substantive area of study and its applicable theories. Engaging the literature provides the researcher with knowledge of the substantive area in sufficient depth to understand the parameters of the discourse and enter into the current theoretical conversation. (Charmaz & Bryant, 2007, p. 261)

This shift from classical GTM thinking drew attention to the value of literature as a resource for developing early questions for inquiry (Strauss & Corbin, 1998).

Constructivist grounded theorists have embraced the idea that researchers can be reflexive about their own understanding of the phenomena being studied, and treat the literature review as a tool that can enrich and aid a researcher's understanding of the participants' experiences and the social processes being explored (Charmaz & Belgrave, 2012, p. 19). Charmaz (2014) does, however, heed warning that researchers should not allow literature reviews to "stifle creative or strangle your theory" (p. 308).

My study embraced the principles of constructivist grounded theory so my use of the literature review is aligned accordingly. Drawing from both perspectives, my literature review was utilized in the planning stages of the research to identify my sensitizing concepts and following the research to illuminate my findings. The latter literature focus is detailed in Chapter VI.

While Charmaz acknowledged the helpfulness of the many GTM variations and strategies that have developed for “collecting, managing, and analyzing qualitative data” (Charmaz, 2006, p. 15), she is known for having built on GTM emphasizing a worldview that researchers and participants co-construct realities and the nature of this relationship enriches data (Mills et al., 2006, p. 31). This angle appears to have shaped her interpretation of GTM as a process that holds tension with creativity and flexibility as well as the structure of the method itself. Her guidance to researchers extends to how to make meaning from data elicited from participants’ experiences. As described by Mills et al. (2006), a researcher must “resolve the tension that exists between developing a conceptual analysis of participants’ stories and still creating a sense of their presence in the final text” (p. 32). The very idea that the researcher is part of the process distinguishes constructivist grounded theory, and builds on GTM’s underlying philosophical concepts of pragmatism and symbolic interactionism while adding new dimension GTM.

Clarke: Situational analysis. Inspired by Strauss’ work in both grounded theory and social worlds theory, Adele Clarke (2005) developed situational analysis as an elaboration of these ideas. The situational analysis concept has been referred to as “a radically different conceptual infrastructure or guiding metaphor from the action-oriented

'basic social process' concept that undergirds traditional grounded theory" (Clarke, 2005, p. xxii). Key characteristics involve practical mapping approaches which have been referred to as "fresh ways into social science data" (p. xxii). Clarke's work is described as having:

Moved sociopolitical and discursive context from background to center, offering an important and effective counterweight to the increasingly intrapsychic focus of much current grounded theorizing in the practice disciplines. She aimed to explore differences rather than commonalities and to replace the static conditional matrix with more fluid and multi-relational representations of networks of influence, intentionally stopping short of formal theorizing. (Charmaz & Bryant, 2007, p. 147)

Rationale for Research Design and Methods

The unique design of this study brought together two qualitative methods to conduct exploratory research in the still developing area of inclusion. This coupling established an elegant fit as case study and GTM were mutually supportive to each other in facilitating inquiry that explored inclusion at different levels within a single organization. In addition, the strengths associated with each method bridged the limitations of its counterpart. The use of case study and GTM together elevated the rigor of this study. The single case approach honored the notion that realities are social constructions and allowed for contained parameters with respect to exploring how the social processes associated with inclusive leadership evolve at different levels in a single organizational setting. GTM was complementary to this design as it employs an inductive approach with systematic practices for researching social processes.

Methodological rigor. Denzin and Lincoln (2000) explicated the importance of qualitative researchers establishing high levels of rigor by demonstrating transferability, confirmability, credibility, and trustworthiness, and this exploratory critical case study paired with GTM is foundational to achieving this. A strength of the single case

approach is that it establishes feasible parameters necessary for a study designed to examine the complexities associated with inclusive leadership. Scholars have indicated “action is explainable only in terms of multiple interacting factors, events, and processes that give shape to it and are part of it” (Lincoln & Guba, 1986, p. 75). In this respect contextualizing the study within the framework of one organization increased the level of rigor by providing a clear path for sampling, and it offered a definitive context with respect to learning about the micro, meso, and macro social processes that correlate to inclusive leadership (Ferdman & Deane, 2014).

Conversely, a multiple-case study approach investigating individual experiences across several organizations would have entailed a sole focus on social processes at the micro level thereby precluding insights on the dynamic nature of inclusive leadership as a processual, contextual, and relational construct (Booyesen, 2014). Further, a multiple-case study approach could have invoked expansive considerations involving different sectors, regions, structures, policies, and positions, and such variants could have imposed severe limitations and even diluted the credibility of a study on inclusive leadership. A design of this nature would have made it difficult to incorporate the GTM practice of theoretical sampling into the research process as it would have been an expansive undertaking to extend similar purposeful samples within multiple organizations not to mention challenges with access could have become problematic.

Using constructivist grounded theory as a research method within the context of a single organizational case study insured both structure and flexibility were leveraged to optimize the data collection, management, and analysis practices necessary for exploring the complexities of inclusive leadership. Additionally, the single case study

allowed for the contextualizing of participants lived experience with awareness and knowledge of the specific case organizational attributes and events. This study was apropos for constructivist grounded theory as the method employs a systematic process that introduces heightened levels of rigor to qualitative inquiry yet also maintains a flexibility that positions a careful stance of openness to participants' experiences (Charmaz, 2014). Charmaz (2014) outlined this aspect of the method as involving:

Systematic, yet flexible guidelines for collecting and analyzing qualitative data to construct theories from the data themselves. Thus, researchers construct a "theory" grounded in their data. Grounded theory begins with inductive data, invokes iterative strategies of going back and forth between data and analysis, uses comparative methods, and keeps you interacting and involved with your data and emerging analysis. (p. 1)

This notion that a GTM researcher's world is structured yet flexible as she gathers and analyzes data to develop exploratory theoretical propositions, offers perspective on how GTM lends itself well to understanding inclusive leadership (Charmaz, 2014).

By employing techniques of systematic coding and analysis that are central to participants' actual experiences and perceptions, a researcher can develop conceptual theoretical frameworks grounded in that data rather than from hypothetical, controlled environments (Charmaz, 2006). This method also favors how researchers co-construct realities as reflected in how:

The nature of the inquirer-respondent relationships rejects the notion that an inquirer can maintain an objective distance from the phenomena (including human behavior) being studied suggesting instead that the relationship is one of mutual and simultaneous influence. The interactive nature of the relationship is prized, since it is only because of this feature that inquirers and respondents may fruitfully learn together. (Lincoln & Guba, 1986, p. 76)

It is in this manner that the processes associated with constructivist GTM served as an optimal vehicle to developing theoretical propositions to broaden knowledge in a newly, growing field for exploratory purposes.

Holloway and Schwartz (in press) posited GTM is conducive to studying inclusion as it explores how people make meaning of their interactions with others and the system that defines their environment. These scholar-practitioners ascertained grounded theory is a powerful method of inquiry for Equity, Diversity, and Inclusion (EDI) research as it can:

Uncover elusive qualities of the workplace, take the researchers beyond hegemonic understandings of organizations, hold as central the participants and their stories, portray complex interactions, include an intersectional stance, and make visible the role of silence. (Holloway & Schwartz, in press)

This is supportive of my premise of the strong fit for using GTM situated within the context of one organizational case as it presented the opportunity to better understand the evolving and fluid nature of inclusive leadership at multiple levels. The strong fit extended to the single case study as GTM allowed for systematic practices which heightened the rigor of a study centered on social phenomenon as complex as the inclusion construct. It elevated the necessary components of transferability, confirmability, credibility, and trustworthiness (Denzin & Lincoln, 2000). Together case study and GTM fit optimally enhancing the overall rigor of this study. The case study allowed for discovery of the contextual aspects of inclusive leadership within the bounded school district system. GTM facilitated learning about individual participant experiences with inclusive leadership in this specific (contained) work environment, while taking into consideration the contextual elements of that work environment that are an interactional part of the lived experience.

Limitations. While there are tremendous benefits to an exploratory single critical case study and grounded theory, this approach to exploring inclusive leadership within the context of one organization was not without limitations. The three main limitations to this study involved addressing concerns with:

- rigor and manageability in the case study,
- clear analytical processes in GTM, and
- access to participants for data collection.

Case study rigor and manageability. Concerns that are traditionally associated with case studies include rigor, manageability, lack of comparative advantage, and the ability to generalize from a single case (Yin, 2014). The use of GTM for this study significantly alleviated some of these concerns as its systematic procedures are designed to develop theoretical propositions during the analysis phases. In fact, this is a distinguished GTM feature known for heightening the rigor of qualitative inquiry. Further, the focus on one single case insured increased levels of manageability in comparison to employing a multiple-case study approach as well as minimized issues pertaining to organizational access.

Clear GTM analytical processes. While GTM offered practices that solidified the levels of rigor and credibility necessary for this study by providing the structure for how I gathered, organized, and analyzed my data, the method has been scrutinized for unclear analysis processes in the phase of generating theoretical propositions (Kools, McCarthy, Durham, & Robrecht, 1996). My use of dimensional analysis (Schatzman, 1991) offset this concern as it provided “analytic tools necessary to conduct analysis

systematically and to communicate about the analytic process with clarity” (Kools et al., 1996, p. 328).

Dimensional analysis as developed by Schatzman (1991) provides researchers with an approach to analyzing complex phenomenon. This type of analysis involves examining the data through the framework of conditions, processes, and impacts which leads to the development of explanatory matrices as an avenue for explaining the complexities of a phenomenon. The use of dimensional analysis for this study is expanded upon in Chapter V.

Multiple Method Study Research Design and Process

This study was unique in that a case study was combined with GTM to better understand inclusive leadership and its social processes. The dynamics of this design dictated the need for data collection to occur in two distinct phases. Phase I (case study) of the sampling established the context of this case study by learning about the facts, events, and language surrounding the school district’s work environment. This was achieved by interviewing four members from the school district’s leadership group. Questions for these interviews were specific to each participant’s view of the work environment (Examples: What are key initiatives? How do you collaborate?). The information gained in this early stage established the context of the case and helped to guide the second phase of data collection.

The second phase (GTM) used intensive interviewing to explore the social processes that were present at the ground level of the organization. Holloway and Schwartz (in press) emphasized that:

Initial sampling is a purposeful sample that seeks to engage individuals and discourse relevant to the purpose of the study. The purpose is not to establish a

randomly selected sample from the population but rather to deliberately invite individuals in roles who have experience in the phenomenon. (p. 22)

Taking this into consideration, the second phase of sampling involved interviewing 21 participants in principal, teacher, counselor, staff and other roles to understand how they experience inclusion. With the exclusion of students in this study these specific roles were representative of the voices at the ground level within the school system.

For this study, the selected organizational case functioned as a container of the social processes being examined, and grounded theory practices served as the qualitative units of analysis to explore inclusive leadership (Yin, 2014). Pairing the case study with GTM practices established the parameters necessary for generating theoretical propositions on the conditions, processes, and impacts of the social processes associated with inclusive leadership. More specifically, the case study approach facilitated an understanding of the organizational context at the macro and meso levels when inclusive leadership is present; and the use of grounded theory allowed me to explore what was happening at micro and meso levels within the selected organizational context (See Figure 3.1).

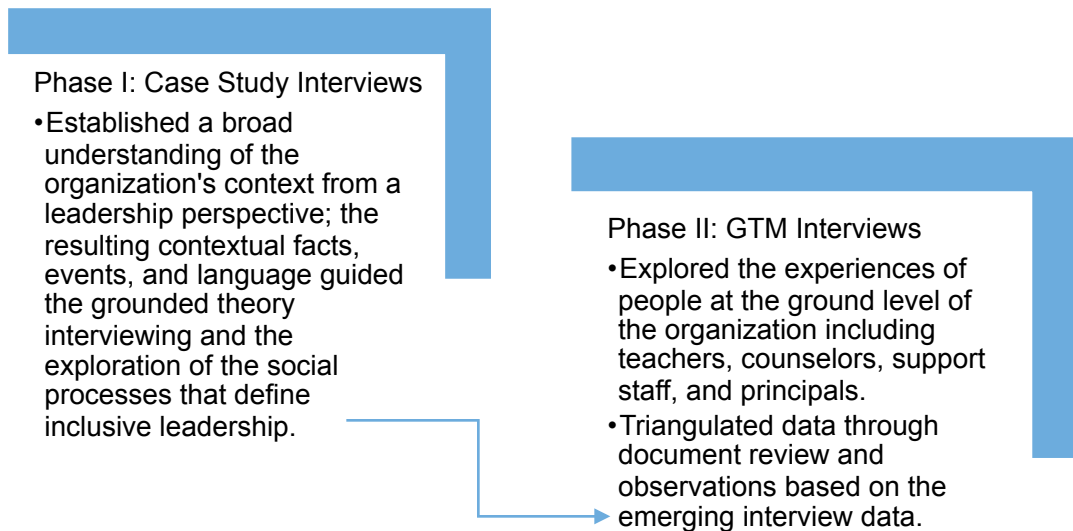


Figure 3.1. Pairing of case study and grounded theory methods.

As depicted in Figure 3.1, the case study interviews were used in the first phase of my research to better understand the organization's context. These were completed to develop an understanding of the organization, and ultimately this helped to guide the second phase of GTM interviewing that explored the social processes within the organization. The multiple method approach of case study paired with GTM employed different types of analyses to garner deeper insights into the social processes that were fostered by inclusive leadership in the Loma School District. I used thematic, categorical, and content analyses in the case study, and the constant comparative method was conducted by a team in the development of GTM theoretical dimensions through dimensional analysis. An overview of the data collection and analysis strategies are described in more depth in the sections to follow.

Sequential data collection and integrated data analysis. The combination of a single exploratory critical case study and grounded theory methods allowed for data collection to occur sequentially with an integrated approach to data analysis. Figure 3.2. illustrates how a sequential approach to data collection was utilized in this study.

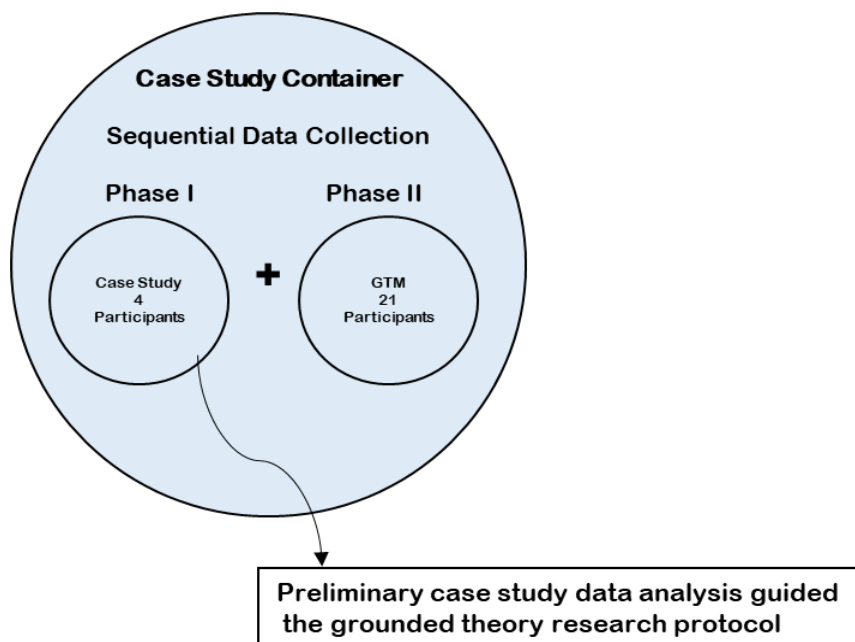


Figure 3.2. Sequential multi-method data collection within the context of the case study container.

The first phase of data collection involved sampling leaders from the participant organization ($n = 4$) to understand their perspectives and to learn more about the case's context at the macro and meso levels. Subsequently, that knowledge of the case's contextual aspects informed the research protocol for the second phase of data collection.

The second phase of data collection employed GTM to delve deeper into understanding how social processes associated with inclusive leadership are experienced by individuals and/or groups in the organization. This phase of data collection involved sampling participants ($n = 21$) in principal, teacher, counselor, support staff, and other roles along with seven field observations. The iterative nature of GTM's coding, constant comparative method, and theoretical sampling practices drove an integrated approach to the data analysis as pictured in Figure 3.3.

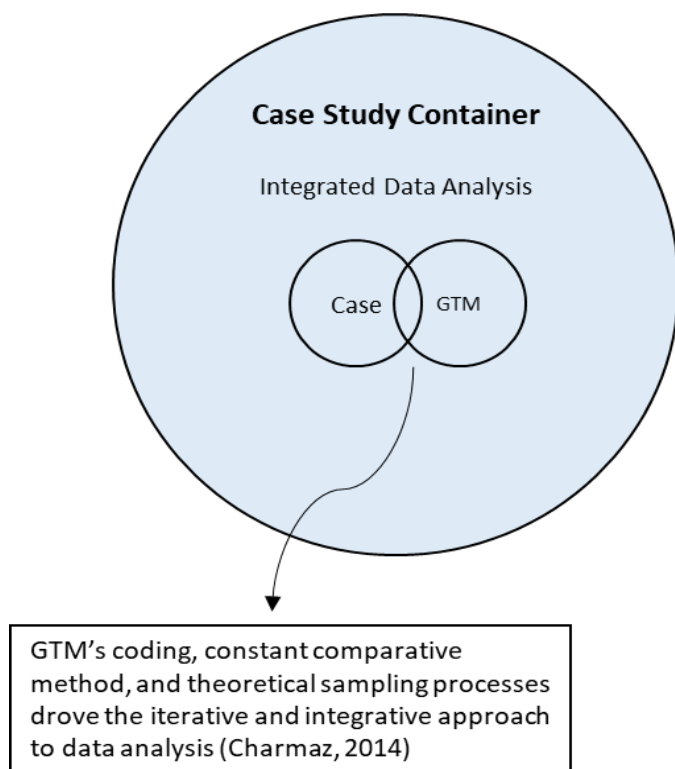


Figure 3.3. Integrated data analysis within the context of the case study container.

Data from both phases were integrated and analyzed within the NVivo program with extensive memo-writing and coding processes to support analysis.

Data analyses. Three types of data analysis processes were used to interpret qualitative data from both phases of this study. In Phase I, the use of thematic, categorical and content analyses elicited a contextual overview of the Loma School District from the leadership's perspective. In Phase II, the use of dimensional analysis was utilized to gain perspective on the social processes that typified participants' experiences with inclusion in the Loma School. Interpreting the data through these different types of analyses afforded me the opportunity to explore inclusion across the micro, meso, and macro levels of the organization. Chapter IV describes the thematic,

categorical and content analyses used in the case study; Chapter V details the dimensional analysis process associated with grounded theory.

Access. According to Locke (2001), the iterative nature of qualitative studies can be draining for organizations and potentially impact a researcher's access. This was a valid concern as researchers can exhaust their welcome when interviews at multiple levels are required to generate the comprehensive data necessary for a study of this nature. My strategy to prevent such circumstances included engaging in a diligent selection process as well as exercising focused mindfulness with respect to the participant organization's needs. It is important to note that through the selection process the participant organization (Loma School District) demonstrated high levels of interest and responsiveness, which were positive indicators of a strong commitment to this research project, and this continued throughout the study. In addition, I needed to insure enough participants from within the school district. While this was a challenge during both Phase I and II of the data collection, it proved most helpful to work closely with the school district's Superintendent when coordinating the participant invitational processes. The process was expanded with snowball sampling as I invited each volunteer participant to pass along my contact information and the nature of this study to colleagues in their school who might be interested in contributing to this study. As an educator myself, I was keenly aware of how important the district's academic schedule and operational priorities were to the institution functioning smoothly. This was taken into consideration over the course of data collection to insure minimal disruption to the organization and its employees resulting in longer data collection periods than I had originally anticipated. Details on the inclusion criteria, selection process, and participant

organization are presented in the upcoming sections that describe each phase of the research.

Data management. The interviews in both phases in this study were conducted by phone and in person based on participant preferences. All the interviews were recorded with a digital recording device. Transcription of the interview data occurred immediately following each interview to allow for the constant comparative approach to be employed with the coding and analysis throughout the data collection process. A transcriptionist was utilized to transcribe each of the recordings. In accordance with transcription protocols I did not include timing of pauses but rather the transcriptionist incorporated a note indicating interruptions, emotional expression (laughing, crying, etc.), and hesitations (“er,” “but what I mean is that,” etc.). I have insured anonymity for all participants as their names have been kept separate and confidential in relation to the interview data. Prior to incorporating the data into the study, member checking was done. Each participant had the opportunity to review, amend, and approve his or her transcript. Lastly, the transcripts were only reviewed by me, my dissertation chair and committee members, and my coding team and coding partner for analysis purposes.

Phase I: Exploratory Critical Case Study

The first phase of this research served as an avenue for contextualizing the case study. Uncovering the different dynamics at the participant organization’s macro and meso levels was instrumental to developing this case’s context. The two outer circles in Figure 3.4 help to illustrate how this early part of the research was focused on learning about the participant organization’s leader perspectives, and this shaped both the macro and meso level picture of the school district and its community.

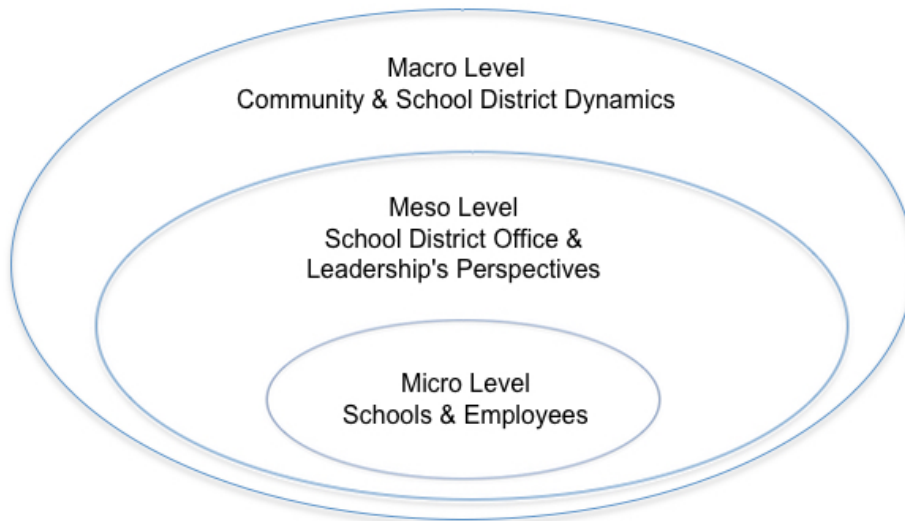


Figure 3.4. Understanding the participant organization at the macro and meso levels.

This section details the specifics pertaining to Phase I of data collection including the case selection and inclusion criteria, case background, participant sampling, and the data collection process.

Case selection and inclusion criteria. My selection process began with outreach to inclusion scholars, professional contacts, and the Antioch University community as well as a few “cold call” emails to organizations that profess inclusion. My preliminary communications outlined how employees might experience inclusive leadership by using the description in Table 3.1. I attempted to have informal phone conversations with individuals that made recommendations to better understand how attributes from the Inclusion Description of experience, as shown in Table 3.1 were present in the recommended organizations. In cases where characteristics of inclusive leadership were apparent I requested a warm introduction, which resulted in calls with several professionals across different sectors including non-profit organizations, private companies, and state systems. By this stage, I opted to discontinue pursuing several of the organizations based on difficulty confirming inclusive leadership characteristics; the

organization's expressed challenges with the time commitment for this qualitative study; and/or the organization demonstrated a lack of interest.

Table 3.1

Participant Descriptions of the Inclusion Experience

What is it like when I feel included in my workplace?

- I understand what's happening in my unit as well as what is happening in other areas of the organization;
- I know why we are doing things and how my role contributes to the larger picture;
- It is safe to ask questions, suggest changes, and make decisions;
- I feel like I am part of the organization's solutions and future direction;
- My leaders understand what is happening in all the different areas;
- My leaders are approachable and open with us. They listen, and invite us to co-construct and co-create thereby establishing a collaborative and team-oriented experience at work;
- Our individual uniqueness and differences are appreciated;
- We are respected and valued; and
- All of us are accountable.

Factors that led to the selection of the Loma School District included:

- evidence of inclusive leadership and inclusion practices,
- a demonstrated openness and commitment to this research, and
- credibility of the recommendation.

This school district was recommended by an education professional. She acknowledged having worked directly with the Superintendent, and based on the Inclusion Experience description in Table 3.1 suggested the organization be considered for this study.

In my preliminary communications with the Superintendent, the inclusion/exclusion criteria for the participant organization were confirmed to evidence the inclusion experience characteristics as outlined in Table 3.1 along with a keen

openness and commitment to the research. The Superintendent's description of the Loma School District echoed attributes of inclusive leadership involving a relational, participative, and communicative approach. Detailing how they serve a hybrid grouping of schools in a high poverty community, he shared how internal and external stakeholders had been involved in developing the school district's improvement plans since his arrival in 2013. His precise descriptors for this were that the district environment is one of partnership and shared decision-making. His sentiments extended to their values-focused mission with helping children to build their futures as he articulated ways they were doing this beyond education. Examples he cited included: that they had figured out a way to provide their children with three free meals a day, and had kept the schools open last year when wildland fires were encroaching upon the community; this as a vehicle for normalcy through those tough times. He emphasized how their efforts were resulting in positive outcomes such as recent attendance and graduation rate improvements in some of the schools.

The Superintendent was open in his stance, verbalizing how he appreciated the opportunity to be involved in this type of research reflecting that it might aid him and his teams in learning and improving to better serve their children and community. During this call, I reiterated that my commitment to the participant organization would be to provide a full report of my research along with access to my dissertation and a pro bono presentation to cover the research and findings. Afterwards, the Superintendent and his board expediently provided me with a Letter of Authorization/Cooperation (see Appendix A) to pursue research in the School District. My careful selection process helped me to determine that the School District was an optimal fit for this study as the

organization evidenced characteristics of inclusive leadership and demonstrated a keen openness to participating in this research.

Case organization background. The Loma School District is geographically positioned west of the Rocky Mountain Range in a rural United States locale. Home to several diverse Native American Indian tribes, the people living in this isolated agricultural region sustain themselves economically through farming, forestry, and tourism. The community faces a range of social issues including poverty, and drug and alcohol abuse. The District administers five brick-and-mortar schools known as Loma Park, Loma Prairie, Loma Meadows, Loma Central, and Loma Plains.³ The schools serve approximately 1,500 students from pre-school through high school levels. The student demographics include a proportionate population of children from Native American, Hispanic, and Caucasian ethnic origins as referenced in the Loma School District's reporting to the state.

It is important to emphasize that the participant organization is not a traditional school district with member schools that are similar in structure and functions. The school district is unique as it consists of brick-and-mortar schools, virtual academies, and a K–9 boarding school. Had I involved all three types of these schools it could have impeded my ability to establish a contained context for the case study, and it is likely that it would have created contrasting units of analysis. The term *units of analysis* is used in a case study to define the participant's organization context. In this respect the virtual and boarding schools are contexts that contrast with the more traditional schools in the Loma School District (Yin, 2014). For this reason, I excluded the virtual

³ Pseudonyms are used for the names of the schools throughout this study.

academies and K–9 boarding school from my sampling strategy, and only pursued intensive interviewing with employees in the “brick and mortar” schools. Additionally, the K–9 boarding school was excluded as it serves a protected (Native American) population with unique cultural considerations, and involves an entirely different organizational structure involving services distinct to boarding schools.

Based on Yin’s description of units of analysis (Yin, 2014), Figure 3.5 helps to illustrate how the Loma School District served as the context for this single case study design with the units of analysis designated as the Loma School District’s five brick-and-mortar schools.

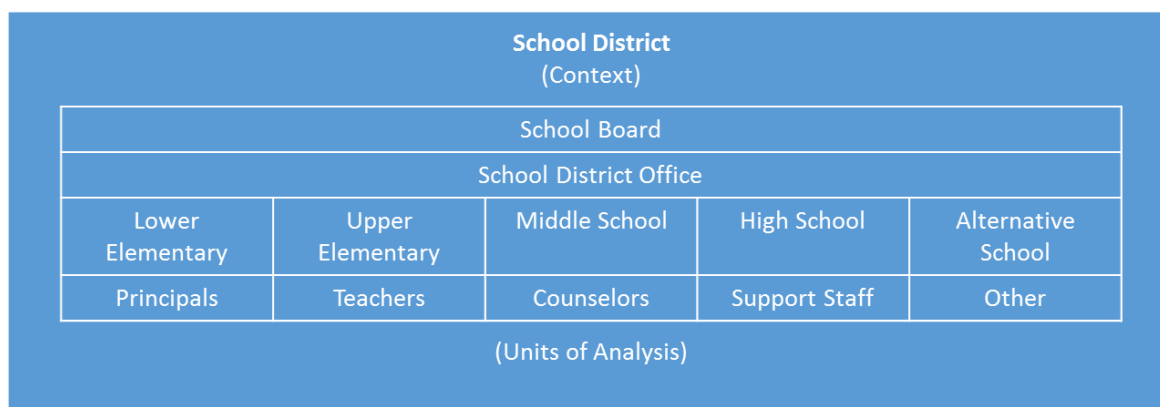


Figure 3.5. Loma School District: Single case study design and units of analysis.

Case study participant sample. Following the guidance of Antioch University’s Institutional Review Board, a pre-approved invitation was distributed by the Superintendent to members of the school district’s leadership team. Four participants provided signed consent and participated in interviews. The case study participant demographics included two male and two female Caucasians ranging from 30 to 65 years in age. The four participants’ education levels varied from professional to administrative backgrounds with time in the district ranging from 1 to 25 years of service.

Case study data collection. Intensive interviewing was used for data collection in Phase I with each interview conducted by telephone using a digital recording device. At the onset of the interviews participants were asked to provide basic details of their professional role within the organization. Once that information was outlined, I invited participants to share their experiences in the Loma School District. The purpose of these interviews was to understand leadership's perspectives on the school district as well as to learn more about the macro and meso level forces associated with this case's context. The unstructured approach allowed participants to guide the interview direction. This process resembled a fluid conversation allowing me to listen without bias and prompt with supportive, open-ended questions to learn more about each participant's views and perceptions (Rubin & Rubin, 2012; Yin, 2014). A professional service bound by a confidentiality agreement transcribed the interviews. Self-identifiers were deleted from each transcript, and member checking was utilized afterwards affording participants the opportunity to review, amend, and approve their individual transcripts. The approved transcripts were imported and coded in the NVivo software program.

Case study data analysis. The case study data collection was driven by an interview protocol with a template of questions that guided conversations with participants. Participant transcripts were coded, and the interview data was then examined with thematic, categorical analysis and content analysis. Phase I of the data collection guided the direction of the emergent sampling strategy for Phase II of this study, which involved participants that were school employees in principal, teacher, counselor, support staff, and positions. This two-phase sampling was essential to

understanding how inclusive leadership emerge and how it is experienced within an organization setting

Phase II: Grounded Theory Study

The case study led to the development of an early foreshadowed question for the grounded theory data collection in Phase II. The purpose of Phase II was to learn about peoples' experiences with being involved in their school. Constructivist grounded theory (Charmaz, 2008) is explicit in its emphasis on how one can address the “why” of a social phenomenon and still preserve the complexities involved with human social life offering an especially strong fit for this study on inclusive leadership. The following sections detail the second phase of data collection and management process involving grounded theory.

GTM participant sample. Phase II of the data collection repeated the same recruitment protocol from Phase I with the Superintendent distributing a pre-approved invitation to employees in the school district (see Appendix C). Over the course of five months, 21 participants provided signed consent forms and volunteered to interview. An overview of the demographic data for Phase II is outlined in Table 3.2

Table 3.2

GTM Participant Demographics

Participant	Length of Service	Education Level	Gender	Age
G5d1	0–5 years	Masters or Higher	Female	36–50 years
G5e2	0–5 years	High School, Associates and/or Bachelors	Female	36–50 years
G2b3	6+ years	Masters or Higher	Male	36–50 years
G7e4	0–5 years	Masters or Higher	Female	36–50 years
G5b5	6+ years	Masters or Higher	Male	51–70 years
G5d6	6+ years	Masters or Higher	Female	36–50 years
G8g7	6+ years	Masters of Higher	Female	51–70 years
G2d8	0–5 years	Masters or Higher	Female	51–70 years
G6b9i	6+ years	Masters or Higher	Male	36–50 years
G4d10i	0–5 years	Masters or Higher	Male	51–70 years
G5e11	0–5 years	High School, Associates and/or Bachelors	Female	18–35 years
G5d12	6+ years	High School, Associates and/or Bachelors	Female	36–50 years
G1a13i	6+ years	High School, Associates and/or Bachelors	Male	36–50 years
G5e14i	6+ years	Masters or Higher	Female	51–70 years
G5d15i	6+ years	High School, Associates and/or Bachelors	Female	51–70 years
G5d16i	6+ years	Masters or Higher	Female	51–70 years
G5e17i	6+ years	High School, Associates and/or Bachelors	Female	51–70 years
G5e18i	0–5 years	High School, Associates and/or Bachelors	Female	51–70 years
G5d19i	6+ years	Masters or Higher	Female	36–50 years
G5d20i	0–5 years	Masters or Higher	Female	51–70 years
G5e21i	0–5 years	High School, Associates and/or Bachelors	Female	36–50 years

Note. See Appendix F for participant sample numbering index.

This sampling represented a range in age, gender, tenure and level of education. Further, it engaged participants from across different roles including principals, teachers, counselors, support staff, and other positions. For confidentiality purposes race, ethnicity, and participant roles have not been disclosed. There was some ethnic-racial diversity within the participant sample, yet the rural community, its low

percentage of college graduates, and the state's teacher shortage impact the school district's ability to recruit qualified educators that are representative of the local community's ethno-racial backgrounds.

In my original letter of consent (see Appendix D) I specified the following requisite criteria for volunteer participants: participants must be full-time employees of the Loma School District or schools; and participants must be over 18 years of age. The first criterion was initially included to insure participants had an overall understanding of the school and work environment. This was later revised to include part-time employees during the theoretical sampling process based on the need to understand the diverse perspectives of a broader participant sampling resulting in the resubmission of my IRB application with an amended consent form (see Appendix E). The second criterion was specified as this study was not designed to include students.

GTM data collection. The approach of interviewing participants in different roles was important as it revealed a diverse group of individuals' lived experiences with inclusive leadership. Conjointly, it unveiled the social processes that evolved within an inclusive context thereby allowing me to learn more about inclusive leadership at various levels within an organization. Phase II of the data collection involved intensive interviewing (Charmaz, 2006) to gain a deep understanding of how participants experience and perceive inclusive leadership in their work context. GTM typically involves 20 to 30 interviews (Creswell, 2014, p. 189); there were 21 interviews ($n = 21$) in the GTM portion of this study. Although intensive interviewing in GTM is like other qualitative interviewing styles, grounded theory researchers refrain from the use of interview protocols or guides to insure the interview evolves as "an unfolding

experience” (Charmaz, 2006, p. 31). A unique aspect to this interview style is that one question has the potential to guide an entire interview with the researcher employing prompts and open-ended questions to elicit participants’ experiences rather than guiding or forcing the interview direction (Charmaz & Belgrave, 2012).

The GTM pilot study I conducted prior to candidacy gave me an opportunity to engage in intensive interviewing which is an essential component to grounded theory data collection. The pilot resulted in two pertinent takeaways: the value of leveraging one primary interview question rather than using an interview guide; and the necessity of using sensitive prompts when encouraging participants to share their experiences. Initially, I was perplexed at the notion of preparing only one main question for the pilot interviews as it seemed counterintuitive to my professional experiences. However, the awkwardness associated with this idea quickly dissipated as the realization set in that the use of one question fostered a setting for participants to comfortably share their lived experiences. This was effective with engaging the participants in telling their stories in a safe and conversational way rather than my diverting their natural story lines with preplanned interview questions.

Building on this, the second takeaway was my realization of the importance of using delicate prompts with minimal intrusion when encouraging participants to reflect and make meaning of their experiences. Use of the following prompts during the pilot study exemplified how a researcher can help participants to reflect deeper on their experiences:

- What’s it like when you find out what they are really trying to solve?

- When you think about the organizations that you've worked with, what's one experience that stands out to you?

Understanding how to use prompts in intensive interviewing was instrumental as it enabled me to facilitate a space that insured that participants guided the conversations with their authentic reflections.

As the interviews progressed, emergent questions included inquiries about making decisions, effecting change, feeling valued, and having voice and choice. Engaging in the constant comparative method by coding interviews and memo-writing led me into theoretical sampling following my thirteenth interview.

Holloway and Schwartz (in press) described, theoretical sampling:

Begins as the researcher seeks to go back to initial interviewees and ask more detailed questions, seeks new sources of information relevant to the concept of interest, or recognizes a player who may bring a different perspective to the social situation being studied. (p. 33)

The selection of the school for the theoretical sample was easily determined based on how half of the initial sample had offered insights on the Loma Park School. This guided me to pursue more interviews “to check, qualify, and elaborate the boundaries of categories” (Charmaz, 2014, p. 205) and to specify the relationships that were emerging in the data. The decision to pursue theoretical sampling across different roles within one designated school was about “conceptual and theoretical development” of the analysis rather than “representing a population or increasing the statistical generalizability” of the results (Charmaz, 2014, p. 198).

GTM analytic practices. Coding practices are fundamental to data analysis in GTM as they represent a researcher's compass to examining and understanding her data, and this ultimately lends itself to discoveries associated with the phenomenon

being studied. Charmaz (2014) noted that there is an aspect of play in this process as a researcher can play with ideas that are gleaned from the data, which reflects in the coding descriptions that follow.

Initial coding. In concert with GTM protocols, I engaged in line by line coding of the participant reviewed transcripts immediately following each interview. This initial coding process is best described as “exploring fragments of data, a researcher has flexibility with initial coding via word by word, line-by-line, or incident by incident analysis at this stage” (Charmaz, 2006, pp. 109, 113). The practice of line-by-line labeling of data helps to “describe, dissect, and distill the data while preserving their essential properties” (Charmaz & Belgrave, 2012, p. 20). My coding team also participated in line-by-line coding which I reviewed in conjunction with my own line-by-line coding to insure objectivity in my coding practices.

Focused coding. Charmaz (2006) emphasized how focused coding is pivotal to how a researcher organizes her data and analyzes the emergent themes. This has relevance as it demonstrates how as a researcher works through the initial coding process, codes will emerge with frequency and/or significance and these will then become the basis for analysis, synthesis, and conceptualization of that data (Charmaz & Belgrave, 2012). More specifically, focused coding entails “using the most significant codes and/or frequent earlier codes to sift through and analyze large amounts of data” (Charmaz, 2014, p. 138). This process leads to the development of categories by aiding the researcher in grouping the codes in a more meaningful manner (Charmaz, 2006; Charmaz, 2014; Holloway & Schwartz, in press). Following the first three GTM interviews, I began cleaning up labels and shortening codes, and organizing them to a

higher conceptual level. Grouping the codes into different categories and organizing them in parent and children nodes allowed me to examine frequency of codes and the trends that were emerging in the grounded theory interviews.

Axial coding. Charmaz (2014) detailed axial coding as when a researcher “relates categories to subcategories, specifies the properties and dimensions of a category, and reassembles the data you have fractured during initial coding to give coherence to the emerging analysis” (p. 147). At this stage I was examining the categorical relationships at a broader level to understand what was happening within the context of the Loma School District. I had begun to sketch out visual representations of the relationships that were emerging from the data which served as the transition point into dimensional analysis.

Constant comparative method. The constant comparative method allowed me to fluctuate between interviewing, reviewing transcripts, coding, and memo-writing as I engaged in Phase II of the data collection. The process of successive movement between data collection and analysis involved coding interview data while proceeding with interviews and constantly returning to each data set to make comparisons with reflections being documented in the form of memo-writing (Charmaz & Belgrave, 2012). This successive movement between data gathering and analysis was instrumental to the emergent categories that drove the dimensional analysis process.

Coding team. Using the constant comparative method during initial and focused coding is how a GTM researcher engages in analysis throughout the data collection process (Charmaz & Belgrave, 2012). My early coding activities in NVivo were enhanced by collaboration with a grounded theory coding team, none of whom had a

vested interest in my topic or research, to insure breadth of interpretation as well as my own objectivity. Each member of the coding team had an earned doctorate degree with training and experience in GTM. The activity with my coding team was critical to insuring my own theoretical sensitivity as dialog and feedback on my coding insured my neutrality and self-awareness as I viewed and assessed the participants' words and experiences (Mills et al., 2006). The process helped me to set aside my own assumptions and proceed with increased levels of objectivity as I explored the data. From Charmaz' perspective this was instrumental as it enables GTM researchers to "discern meanings in their emergent patterns and define the distinctive properties of their constructed categories concerning these patterns" (Charmaz, 2006, p. 161). As mentioned, the coding process unfolded the emergent themes evidenced in the data and guided the course of theoretical sampling. Later, these processes actuated the mapping of dimensions to characterize relationships that emerged in this organizational setting with inclusive leadership (Benson & Holloway, 2005; Kools et al., 1996; Schatzman, 1991).

Theoretical Sampling. Charmaz (2006) described GTM's iterative nature as "toggling between data and analysis," and emphasized that this may lead a researcher to return to early participants or to invite new participants to interview based on theoretical ideas that are emerging within the data (p. 103). This differs from sampling in quantitative research as it does not relate to population representation but rather presents a flexible research path which supports the generation of theoretical propositions from data. This was exemplified in Charmaz and Belgrave's (2012) description: "When a category is incomplete, grounded theorists interview select

participants about specific key ideas to extend, refine, or check their categories” (p. 25), This fosters richer data, new category development and discovery in terms of gaps in the data. As highlighted earlier in this chapter, theoretical sampling took place in the Loma Prairie School. This involved eight participant interviews to develop and saturate categories based on the emerging themes relevant to inclusive leadership.

Memo writing. I employed the practice of memo writing over the course of this study as it is instrumental in engaging a researcher in documenting reflections as well as revisiting her sensitizing concepts while she works with the data and explores the participants’ experiences. This GTM practice is described as prompting “us to raise our codes to conceptual categories [and] . . . helping us to avoid forcing data into extant theories” (Charmaz & Belgrave, 2012, pp. 22–23).

Saturation. In grounded theory, a researcher pursues data until no new information emerges within the respective category which indicates the category is saturated (Charmaz & Belgrave, 2012). Charmaz (2014) cautioned that saturation not be confused with the concept of experiencing repetitive events or actions through participants’ experiences. Instead, “categories are ‘saturated’ when gathering fresh data no longer sparks new theoretical insights, nor reveals new properties of these core theoretical categories” (Charmaz, 2014, p. 213). Saturation was reached in this study after 21 GTM interviews had been conducted.

Triangulation. Triangulation is relevant to both case study and GTM standards of rigor. In qualitative inquiry triangulation serves as an avenue for adding depth to the social processes being studied as it supports a multitude of research practices in confirming data being gathered (Denzin & Lincoln, 2000; Yin, 2014). Specifically,

triangulation is defined as “the convergence of data collected from sources, to determine the consistency of a finding” (Yin, 2014, p. 241). Stake (1995) furthered the relevance of triangulation by noting that it affords a researcher the ability to “gain the needed confirmation, to increase credence in the interpretation, to demonstrate commonality of an assertion” (p. 112).

For this study, my professional knowledge and judgment of organizational structure, culture, and inclusion helped to guide the discourses that contextualized this case. During the case study, I engaged in document reviews (Creswell, 2014; Yin, 2014) of board meeting minutes, the strategic plan, reports pertaining to accreditation and long-range facilities planning, power point presentations for all-hands meetings and planning committees, and general information found on state and school websites. I also watched videos of student led assemblies and cultural activities. The document and video reviews allowed me to bring together different sources of data which aided in confirming interview themes surrounding the organization’s historical events, demographics, district protocols and processes. The reviews also revealed key focus areas and progress with initiatives each of which held relevance to establishing the context of the case study. Contending the importance of triangulation and qualitative validity, Creswell (2014) noted “if themes are established based on converging several sources of data or perspectives from participants, then this process can be claimed as adding to the validity of the study” (p. 201).

In the grounded theory phase of this study, the emerging data and hypotheses served as a compass for my GTM triangulation strategy, which involved direct observations and field notes (Yin, 2014). Observations were arranged at the school

designated for theoretical sampling to build on what was being learned through the iterative process of GTM interviewing, coding, and memo-writing. My observations included different types of staff meetings, daily school activities, teachers in classrooms, the after-school program, and an orientation for parents allowing me to observe activities and behaviors in the participants' natural work setting (Creswell, 2014).

Other forms of triangulation that were utilized included:

- Member checking with all participants to allow them to confirm the accuracy of their reported experiences (Yin, 2014);
- Bias clarification as outlined in the earlier researcher positionality subsection detailing reflections on how my background (gender, culture, socioeconomic origin) shapes my thinking and interpretation of inclusion and inclusive leadership (Yin, 2014, p. 202); and,
- Working with a GTM coding team during the coding and analysis stages of this study. This team of experienced grounded theory researchers coded the same transcripts that I coded at the onset of Phase II to insure the themes from my data were objective and emergent in nature.

Each of these forms of triangulation were relevant and necessary to my research process as they insured high standards of rigor for a multiple method research involving case study and GTM.

Ethical Considerations

One of the most pressing ethical considerations a researcher has is to insure the safety and integrity of the study's human participants. I followed Institutional Review Board (IRB) protocols and submitted my application to Antioch University's IRB for a full

review of the proposed research methods. The emergent nature of qualitative inquiry led me to shift my sampling inclusion criteria, and at that juncture I revised my application and requested a second IRB review. This was essential to verifying that my research plans corresponded with the highest standards of protection and sensitivity to the participants in my study.

A critical consideration was to insure the school district, schools, and participants were not identifiable by location, position, and/or population. This study was aimed at deriving theoretical propositions from reality. Achieving this involved learning about leadership perspectives at a strategic level in the organization in the case study research, and understanding the participants' lived experiences at the ground level of the organization in the grounded theory research. Both aspects of the research served as the impetus for exploration of inclusion at different levels within the participant organization. This research was not about exposing or evaluating specifics that relate to the organization and its members although my commitment held firm to mitigate any unexpected risks that might have arisen such as embarrassment or exposure (Stake, 1995). Instead, this study explored inclusion at a conceptual level as a vehicle for learning how such dynamics can be practiced in other settings. The rigorous nature of GTM's systematic processes insured this, so as anticipated there was no danger to participants and the organization. As a scholar-practitioner I have remained resolute in my alignment with Stake's (1995) assessment that "qualitative researchers are guests in the private spaces of the world. Their manners should be good and their code of ethics strict" (p. 447).

Chapter III has provided a methodological overview as it related to this research. It also focused on the important components to this multiple method study including its design and processes. The specifics pertaining to this multiple method research design, combining an exploratory critical single case study and grounded theory study, established a strong fit for exploring inclusive leadership within the context of one case, and evidenced the high levels of rigor that have been achieved with this design and method. The chapters to follow detail the case study including its analysis and findings (Chapter IV) and the grounded theory analysis and results (Chapter V). In Chapter VI, I discuss the overlapping case study and GTM findings, theoretical propositions and relevant literature, implications for leadership practice, limitations to the study, and recommendations for future research.

Chapter IV: Case Study

As overviewed in Chapter III, the case study is an integral component to this study since it explored school district leaders' perspectives to establish the organization's context. The purpose of this chapter is to review the findings of the case study and present how these influenced the grounded theory portion of this study. The discussion to follow covers first, the analysis process used to establish the case context; second, the seven key themes that emerged in the case study data; and third, how the case study's findings helped to guide Phase II of this study.

Analysis Process for Establishing the Case Context

Yin (2014) pointed out that analytics are the least developed aspect to the case study approach, which can pose a serious challenge to the research process. Some options for case analytics have been described as:

- putting information into different arrays,
- making a matrix of categories and placing the evidence within such categories,
- creating data displays—flow charts and other graphics—for examining the data,
- tabulating the frequency of different events,
- putting information in chronological order or using some other temporal scheme. (Yin, 2014, p. 135)

These analytic processes exemplify how “qualitative researchers build their patterns, categories, and themes from the bottom up by organizing the data into increasingly more abstract units of information” (Creswell, 2014, p. 186). My training in grounded theory practices made it natural to pursue analysis based on a ground up strategy for developing an understanding of the Loma School District's leadership perspectives and the organization's context at the macro and meso levels (Creswell, 2014; Yin, 2014).

The process I utilized for this early data analysis to establish the case study context is outlined in Figure 4.1.

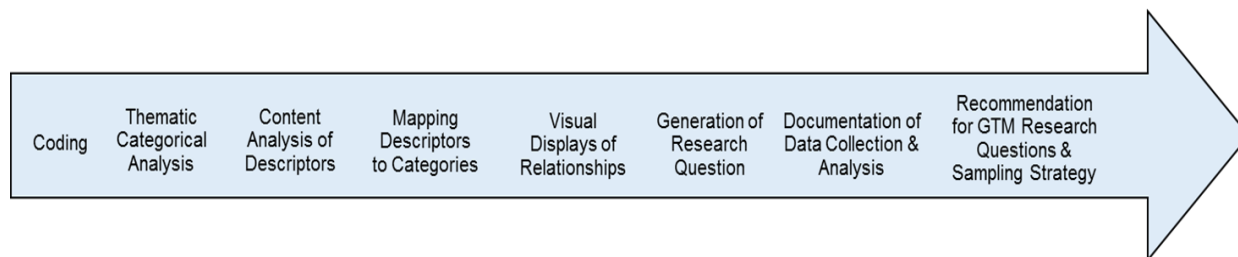


Figure 4.1. Analysis process for establishing the case study context.

This involved (a) coding transcripts; (b) thematic, categorical analysis; (c) content analysis; (d) mapping descriptors to categories; (e) developing a visual display to illustrate relationships between the main themes; (f) generating a GTM research question and sampling strategy; and (g) documenting the data collection and analysis process to substantiate my recommendation for Phase II of this study.

As shown in Figure 4.1, I began with an in-depth review of the data by coding each of the transcripts in NVivo, which resulted in 513 codes. Next, I pursued thematic, categorical analysis. This involved grouping the 513 codes into seven themed categories. These categories emerged during the coding process; each one was supported by a large number of codes from the interview data. As the thematic, categorical analysis was completed, it became evident that the participants were repeating specific verbiage related to the main categories. This realization led me to pursue content analysis to examine high frequency descriptors. Once this was completed, the high frequency descriptors were mapped to the main categories, and then a visual display was created to illustrate the relationship between key themes in the data. This led to the generation of my GTM research question and sampling strategy for the second phase of this study followed by the documentation of the case study data

collection and analysis process. It is important to detail both areas of analysis that followed the coding process to establish the basis for my GTM research question and sampling strategy.

Thematic, categorical analysis. Seven categories emerged in the thematic, categorical analysis including relationships, involvement, communication, internal and external forces, practices/behaviors, focus, and context. Each of these categories were supported by a large range of codes as well as specific language that emphasized the relevance of the category. An example of one thematic category with its supporting codes and language is shown in Table 4.1.

Table 4.1

“Relationships” Category, Supporting Codes, High Frequency Descriptors

Category: Relationships	Supporting Codes with High Frequency Descriptors
<p>Value placed on <u>relationships</u></p> <p>Open <u>relationship</u> with leader</p> <p>Seeking applicants that can build <u>relationships</u> and work well with others.</p> <p><u>Relationships-building</u> skills are critical to a safe learning environment.</p> <p>Strong <u>relationships</u> in former positions have a heavy weight in hiring decisions.</p> <p><u>Connect</u> with people</p> <p><u>Connection</u> with people allows for success</p> <p><u>Connection</u> occurs when work feels like family</p> <p>Size limits <u>connection</u></p> <p><u>Caring</u> approach</p> <p>Need for people to feel <u>cared</u> about</p> <p>Gestures of <u>support</u> coach</p> <p>Showing <u>care</u> is appreciated</p> <p>Showing <u>care</u></p> <p>Responsiveness to concerns</p> <p>Showing concern</p> <p>Create context where people feel they are part of a family</p> <p>Develop trust</p> <p>Learn from leader</p> <p>Leader is visible</p> <p>Leader works to <u>understand</u> schools by experiencing them</p> <p>Out and about approach</p> <p>Out about approach prevents insulation</p> <p>Uses walk and talk approach</p> <p>Superintendent is out in the schools observing and speaking to people</p> <p>Superintendent in schools</p> <p>Observes in schools</p> <p>Observes to see if work is <u>aligned</u> with strategy</p> <p>Walk and talk approach is viewed as <u>caring</u></p> <p>Union <u>supports</u> walk and talk approach</p> <p>Moving about district and talking to people</p> <p>Leadership is talking to employees and students</p> <p>Intentional about sacrificing time to <u>listen</u> to people</p> <p>Leader <u>listens</u> to people</p> <p><u>Interacts</u> with students</p> <p>Asks questions</p> <p><u>Asking</u> open-ended questions</p> <p><u>Asking</u> questions to formulate plans</p> <p>Focus on <u>asking</u> questions</p> <p>Develop employees to <u>ask</u> questions</p> <p>Help staff <u>understand</u> cultural differences</p> <p>Value placed on <u>relationships</u> that are not top-down</p> <p>Intentional about building <u>relationships</u> and trust</p>	<p>Make people equals</p> <p>Building strong <u>partnerships</u> with stakeholders</p> <p>Making time for people is crucial to success</p> <p>Need to <u>interact</u> and know who people are</p> <p>Inviting the <u>community</u> to be a part of the discussion</p> <p>Involving <u>community</u> in the schools</p> <p>Provide opportunity for <u>teams</u> to <u>interact</u> is crucial</p> <p>Work as <u>team</u></p> <p>Work through issues as a <u>team</u></p> <p>Processes <u>involve</u> collaboration amongst stakeholders</p> <p>Address silos and interpersonal <u>connection</u></p> <p>Decrease silos</p> <p>Minimize silos (3x)</p> <p>Initiatives fall flat without <u>relationships</u></p> <p>Success is built on <u>relationships</u></p> <p>Truancy board process engages student and family</p> <p>Developing <u>relationships</u> with unions</p> <p>Developing trust with unions</p> <p>Mentoring students by <u>asking</u> questions</p> <p>Employee encouraged to mentor students</p> <p>Students learning to work with <u>community</u></p> <p>Employees <u>involved</u> in the <u>community</u></p> <p>Engaged in organizations focused on <u>improving</u> the <u>community</u></p> <p>It is hard to find the right fit for this <u>community</u> when hiring.</p> <p>Superintendent <u>supportive</u> to employee <u>involvement</u> in student life</p> <p><u>Community involvement</u> in student learning process</p> <p><u>Community members involved</u> in after school program</p> <p>Establish <u>partnerships</u> to build positive interventions for children</p> <p><u>Community support</u> to prevent drop outs</p> <p><u>Community partnership</u> for drug prevention</p> <p>People collaborated during wild fire crisis</p> <p>People carried each other</p> <p>Crisis brought people together</p> <p><u>Understanding why</u> the tribes distrust White people</p> <p>Working to <u>improve relationship</u> with tribal leadership</p> <p><u>Understanding of</u> issues parents face</p> <p><u>Understands</u> importance of <u>connecting</u> with teachers and students</p> <p>Hiring committee is looking for people who will be a good fit.</p> <p>Hiring for some positions like coaches can be contentious.</p> <p>Takes pride in hiring the best people possible.</p>

Note. Underlining indicates use of high frequency descriptors.

In this case, the relationships category is supported by 85 codes including wording that emphasizes human connection with language such as connect, support, care, understand, interact, community, team, and partnership as depicted by many of the underlined descriptors in Table 4.1. The frequent use of specific language in the seven categories prompted me to pursue content analysis.

Content analysis. Upon completion of the thematic, categorical analysis, I reviewed the frequent usage of discourse in each of the seven categories. Table 4.1 displays underlined language exemplifying the emergence of high frequency descriptors for the “relationships” category. All seven categories, their supporting codes, and high frequency descriptors are presented in Appendix G.

Part of the content analysis involved tabulating the usage of the highest frequency descriptors. Table 4.2 overviews the highest frequency descriptors that emerged in the content analysis. As shown, the most frequently used descriptors across all four interviews were involve, community, care/support/resources, continuous improvement/progress, ask/input/listen, align, relationship, and team.

Table 4.2

High Frequency Descriptors and Usage

High Frequency Descriptors	Frequency of Usage
Involve	39
Community	36
Care / Support / Resources	34
Continuous Improvement / Progress	30
Ask / Input / Listen	30
Align	25
Relationship	22
Team	18

Notably, these high frequency descriptors surfaced across all the interviews and mapped to multiple thematic categories. However, the high frequency descriptors are weighted with significant strength to the relationship, involvement, and communication categories. This high frequency descriptor analysis triangulated the main themes that define the case's context. Specifically, it underscored key discourse used by participants and displays language that accentuated the relevance of the seven thematic categories to the case. This content analysis influenced my thinking as I began to process the analysis at a more conceptual level.

Summary. A summary of the fundamental themes that emerged from the thematic, categorical analysis is presented in Table 4.3.

Table 4.3

Thematic Category Sub-Themes

Thematic Categories	Sub-Themes
Relationships	<ul style="list-style-type: none"> • Importance placed on human connection and employing a “caring” approach; • Relationship-building is an intentional act including interaction, presence, trust-building, and care with internal and external stakeholders
Involvement	<ul style="list-style-type: none"> • Value placed on involving internal and external stakeholders in direction, decisions, processes; • Openness to ideas, input, and feedback that emerge through involvement processes • Leader embraces “facilitator” approach; views employees as experts • Encourages a community perspective • Involvement includes choice, voice, and action for internal and external stakeholders
Communication	<ul style="list-style-type: none"> • Focus on generating conversations; communication is a “dialog not a monolog” • Embraces a coaching approach with internal and external stakeholders • Belief in transparency • Expansive communication channels with internal and external stakeholders • Communication involves asking questions, listening, having conversations, soliciting input with internal and external stakeholders
Internal & External Forces	<ul style="list-style-type: none"> • Exhibits awareness of internal and external forces through macro, community, and organizational lenses • Emphasis on overcoming local and distant realities that are impediments • Internal and external focus and stakeholder involvement shapes how the district works to address crisis, conflict, social and academic issues, inequities, growth
Focus	<ul style="list-style-type: none"> • A deliberate focus on continuous improvement; acknowledgement of it being a “work in progress” • Establishing shared vision, shared direction, shared understanding • Stakeholders are active in the goal-setting, prioritizing, measuring progress, re-evaluating and refining district’s strategy and plans • Focus entails a processual approach with emphasis on alignment and simplicity to help graduate 100% of their students
Practices, Behaviors	<ul style="list-style-type: none"> • Focus and direction influence practices, activities, behaviors • Stakeholders are engaged in defining practices and guiding actions • Behaviors include: emphasize people not paper, understand unique cases, extend flexibility, remove obstacles, and create possibilities
Context	<ul style="list-style-type: none"> • Exhibit openness to change and a solutions-focus with continuous improvement; a work in progress mindset • Acknowledgement of progress with specific results • An indication of employee appreciation for voice and involvement • Evidence of happy students • Work experience descriptions include comfort, fun, positive, pride, learning • Belief in leader; positive view of leader

The main categories and their sub-themes suggest the case's context was characterized by the following:

- relationships, involvement, and communication are core components to how the school district fosters human connection;
- human connection is the main thrust to how the school district generates stakeholder involvement in initiatives to advance continuous improvement;

Continuous improvement is focused on addressing the internal and external forces that impact the school district and community and prevent students from graduating. The school district embraces a processual approach to continuous improvement which is advanced by internal and external stakeholders rather than leader-driven. Figure 4.2 illustrates the dynamics that drive the district's processual approach to continuous improvement.

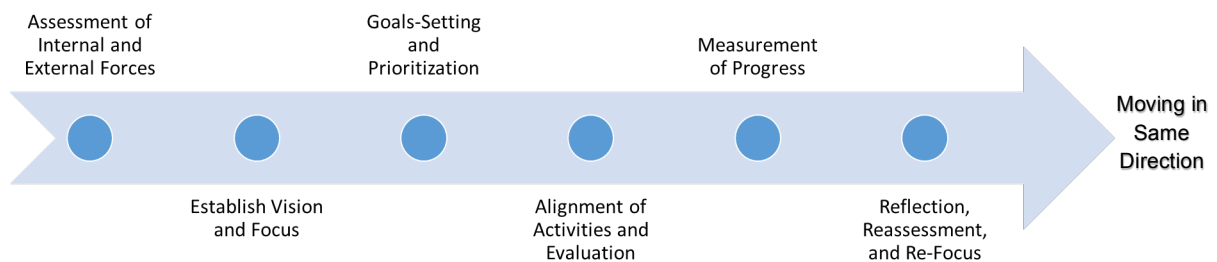


Figure 4.2. Processual approach to continuous improvement.

This process involved the assessment of internal and external forces that impact the school district and community at the macro, meso, and micro levels. With that knowledge, a vision and focus are established which is supported by goal-setting and prioritization to insure activities align with the district's vision and focus. There are ongoing efforts to evaluate and measure progress followed by reflection, reassessment, and refocusing to insure aligned efforts towards continuous improvement:

- The involvement of stakeholders with the focus on continuous improvement influences the practices, actions, and behaviors that emerge within the school district;
- The school district's work setting is an evolving context which is shaped by the human connection thrust and inclusion of stakeholders in the district's continuous improvement focus. The collective focus on overcoming the challenges associated with internal and external forces shapes practices, actions, and behaviors and influences an evolving work setting context.

At this stage of analysis, I reflected on the over-arching themes and sub-themes in the data, and created a data display to visualize the relationships of the case's main themes (see Figure 4.3). Prominent themes included a human connection thrust, stakeholder inclusion, and an evolving context.

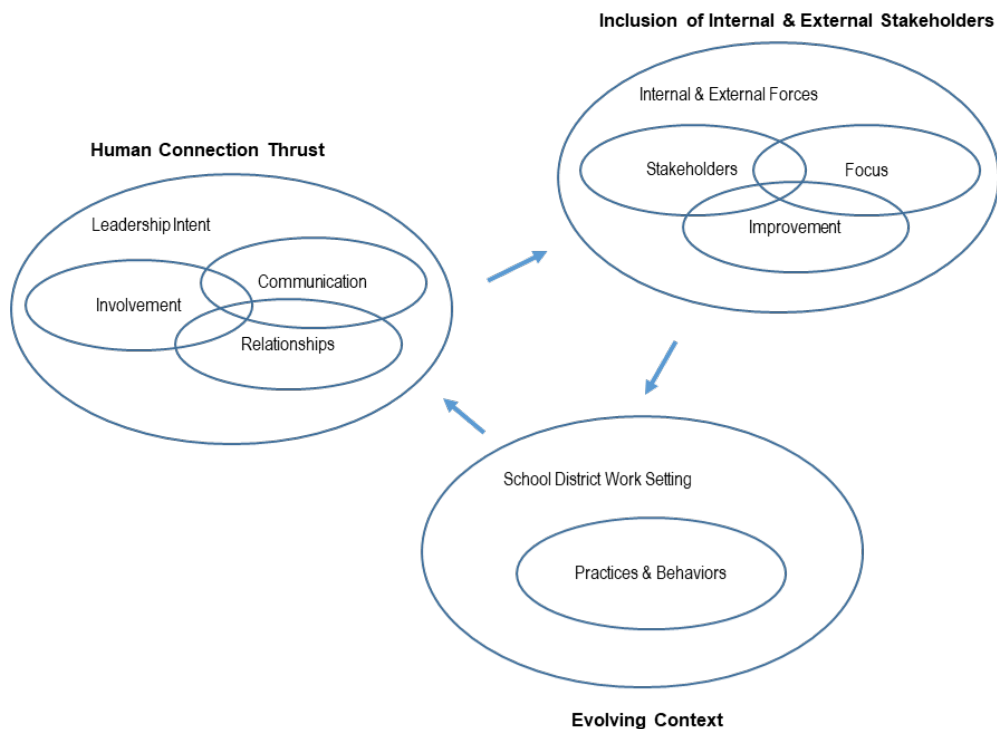


Figure 4.3. Relationships between main themes.

As represented in Figure 4.3, the leaders are intentional about behaviors that foster involvement, relationships, and communication, and they perceive this to be the foundation to how people can connect in the school district and community. This human connection thrust appeared to be the impetus for the inclusion of internal and external stakeholders in advancing the school district's focus on internal and external forces and its emphasis on continuous improvement initiatives. This influences the practices and behaviors within the school district, and shapes an evolving work setting context that is consistently enhanced by the human connection thrust.

The analysis process was instrumental in developing an understanding of this case's context. The sections to follow discuss the case context and its influence on the GTM research question and sampling strategy for the second phase of data collection.

Case Context Discussion

Case study is known as a method that allows a researcher to answer "what" and "how" questions that focus on contemporary events with no requisite for control over behavioral events (Yin, 2014, pp. 9–10). An examination of the nature of events that have occurred in the Loma School District helps to frame the context of this organization. Table 4.4 overviews some of the District's key events since 2012.

Table 4.4

Key School District Events and Timeline

Date	Event
February 2013	Former superintendent died in automobile accident.
July 2013	New superintendent hired. Director of Teaching & Learning position established by new superintendent; position filled.
September 2013	Early release Mondays introduced (PDMs / Professional Development Mondays).
September 2013	District introduced to TPEP/teacher evaluation system to align with state standards.
November 2013	External company hired to facilitate interactive survey process within the district and community to solicit input on the development of the District's strategy.
January 2014	Truancy board partnership established for dropout prevention.
January 2014	ICLE/International Center for Leadership in Education hired to coach the District's teachers on instructional practices.
July-August 2014	Community impacted by Wildland Fires
January 2015	Communications Officer position introduced.
August 2015	Community impacted by Wildland Fires
September 2015	School district announces 100% free lunch program.
September 2015	Twenty-six new teachers hired for the 2015–16 school year.
September 2015	Community-based committee established for long-range facility planning project.
September 2016	School Board approves long-range facility plan.
September 2016	Eighteen new teachers hired for the 2016–17 school year. Agreement established with the state that new hires without certifications have two years to become certified.
January 2017	External (virtual) coaching group hired for support to non-certified new hires.
February 2017	District participates in (voluntary) systems accreditation visit.
April 2017	Propose bond to replace middle school building.

The event timeline in Table 4.4 briefly overviews what has been happening in the Loma School District over the last four years. The participants' reflections of their experiences help to further develop the context of this case with descriptions of key themes around human connection, the inclusion of internal and external stakeholders,

an awareness of internal and external forces, a focus on continuous improvement, and an evolving work context.

Human connection thrust. When reminiscing about experiences of joining the school district four years earlier, participants described the setting as one of a group of schools that were moving in different directions: “Each of the buildings was kind of doing their thing” (Participant c1a4). “Kind of like maybe we didn’t have a lot of guided direction before this superintendent. It felt like everybody was kind of doing their own thing” (Participant c1a3). These observations are further explained:

We had a lot of good initiatives that were going on in the district but they were kind of going in all kinds of directions and nobody was really in sync with anybody else, all the buildings were kind of doing their own thing . . . we needed to get everybody going in the same direction, all the arrows going the same way. (Participant c1a4)

For many years, it was pretty— like in a lot of districts— pretty autocratic or it seemed that way. (Participant c1a2)

The four buildings that kind of just did their own thing. They were sort of loosely associated, at least everybody’s paycheck said the same thing on it . . . As one principal described their staff, it was a building full of independent contractors that shared the same parking lot. (Participant c1a2)

The description of the earlier days denoted a realization that there was a need to connect people, formulate direction, and align initiatives to improve things in the school district. “We can present a million different initiatives, but if there’s no relationships there, it’s going to fall flat” (Participant c1a4).

It was against this backdrop that a focus on people emerged with emphasis on relationships, communication, and involvement. Participant c1a4 noted,

I think the more that we can make our work feel like a family, the more connected we are, I think the more success we’re going to have. And that goes from the kids all the way to the parents, to the teachers, to the administrators.

Another participant commented:

My goal for me specifically is to get the best people that I can possibly get. . . . When I say the best, I'm looking at the number one for me is a person that's able to build relationships with students and work with others (Participant c1a3).

Other shared reflections included:

I think that truly the school's success is built upon relationships. I think that relationships between the teacher and the kids, the teacher and the parents, the administrators and the teachers, the administrators and the parents and community members involved in all of that. Building relationships, building trust it takes time and you have to be intentional about it. You have to make the effort to do it. (Participant c1a2)

I think probably one of the things that is the biggest challenge sometimes is that interpersonal connection between like administration and the rest of the staff. And we're constantly trying to work on that being better We're up on the hill above the high school and the middle school and so sometimes we're known as the people on the hill so there has been somewhat of a disconnect So, I think that would be probably the biggest challenge, is that interconnection, that communication, that level of making us equals not the people on the hill and the people down in the schools. (Participant c1a1)

These descriptions established the participants' understanding of human connection as a necessity to changing the earlier school district dynamics.

Nowadays, there is a commitment to generating conversations by way of a walk and talk approach:

I find myself riding buses, talking to kids, talking to maintenance workers, watching how the cafeteria works and how the kids behave and talking to principals and kids in the building and teachers in the hallway and being in classrooms and just having a look at what's going on. (Participant c1a2)

In this, according to another participant,

It's important to just kind of get a feel for what our kids are like and what our teachers are like and just have that connection. I think that connection is huge for us to really be able to fully do our job and appreciate it. (Participant c1a1)

Avenues for human connection within the school district have been enhanced as value is placed on people over paper.

It's so easy for all of us to get lost in our own little world and just do —I mean, I look at my emails I'm like, 'Good grief! I could sit here all day long and just

respond to my emails without once interacting with another person. (Participant c1a4)

Participant c1a2 expressed similar thoughts:

It's very easy to get insulated without even trying because there are so many things that come across my desk. But it also changes how I work, it changes how my assistant works. And we throw away an awful lot of paper, just get rid of it. . . literally the technology for bureaucracy is just it created ways to generate more paper. The content is of questionable value to begin with.

The leaders perceived the "people over paper" focus as being received positively:

He is out and about in the building just walking around, popping into classrooms, talking to principals, talking to teachers and unclassified. From what I've heard from people is that they are pleased to see that, that they feel like he has an ear to the ground, that he's trying to listen to them. (Participant c1a4)

Other components to the human connection thrust evolve from activities such as listening, information-sharing, and teamwork. "We have to make that sacrifice of time to sit and listen to people, just to dialog and not monolog" (Participant c1a4). Listening is valued in meeting settings as explained by Participant c1a3: "It's just we all sit and listen to what that person has to say at that time. And sometimes there can be back and forth conversation but there is a lot of listening that goes on." Information-sharing is a priority so the district has practices in place to facilitate such communication. For instance, the monthly department head meetings involve the maintenance, transportation, financial, HR, curriculum and learning, communications, after-school, and special education departments.

Everyone comes with again kind of what's happening for them, what they've been doing, what they're intending to do and it just gives all supervisors, department heads an update on what's going on, keeps people informed. It's a really good process . . . There's a lot of information that's shared during that time. It's well-attended, it makes me think that it's well-received that way. (Participant c1a3)

Leaders also emphasized the value of teamwork and collaboration. Participant c1a4 explained: “As a team we sit down and we discuss what’s been going on or what is coming up, any issues that we have and try to work through those as a team.”

Participants implied these human connection activities are meant to address how “there can be a little bit of a disconnect amongst the buildings and amongst the administration or the teachers or the students with administration” (Participant c1a1). Instead there is emphasis on connecting people and working together. These examples point to the importance of communication and relationships. Involvement is also a pivotal element to the human connection thrust; and this is highlighted in the next subsection on stakeholder inclusion.

Inclusion of internal and external stakeholders. Descriptions about the school district give the appearance that it views all employees as having a critical role in the school district’s priority of graduating 100% of its children.

I think that it’s important to share that without question, on a pretty obvious level, our whole district team—and that’s everybody who works for us from bus drivers to custodians to principals and central office folks—they’re really committed to seeing the success of all these kids. Absolutely committed to it. (Participant c1a2)

These kids get on the bus, the driver knows their name, they know each other, they talk. He does the quick check in on how they’re feeling in the morning. And then I stress this with our folks, “you guys are the first ones to see them in the morning and the last ones to see them at night. You know who they are, where they are, where they live or who they’re with and that’s more important . . . whether you are a custodian or a teacher or a bus driver, you may be the one adult in this whole system that that kid connects with and your role in their life is crucial so don’t ever think that it’s not. (Participant c1a2)

Participants also emphasized a range of important relationships with parents and families, local Native American Indian tribes and tribal leadership, local businesses, civic and community organizations, city officials, the community at large, unions, an

accrediting body, the state, and Bureau of Indian Affairs. The district's focus on internal and external stakeholders helps to establish how the identity of the school district is attached to community.

Who we are is a school that celebrates student achievements and really cares about our students. We are a small town. We are a close-knit community. We do see each other in Wal-Mart so we're a part of our community. We're a community school. We're a public school but we're a community school. What are we about? Why do we do what we do? Well, we do it for our students, for our kids . . . Our motto or our mission statement is creating a future for every child, so that's going to be a little different for every child. And that's why we're doing the things the way we're doing them. (Participant c1a1)

The view that the district's schools are community schools is further supported by how both external and internal stakeholders are engaged together in the school district's important initiatives.

It was almost two years ago that our school board actually directed for a committee to be created to study our facilities and get a long-range plan together for about a 20-year window, is what we're looking at. What we ended up doing was we put together a committee of community members as well as staff members to get together and kind of discuss what the issues were. (Participant c1a1)

Participant C1a1 spoke in detail of the facility planning committee, pointing out they had close to 30 people on the committee including parents, staff members, teachers from every building, local business owners as well as community members and other specialists. Participant C1a1 pointed out how the committee was involved in different activities such as building tours and financial discussions, and stakeholder input led to different ideas (Participant c1a1). This facility-planning initiative, Participant C1a1 felt, exemplifies how the school district includes both internal and external stakeholders in important discussions, processes, and decisions. Further, it supports the sentiments that "we want to be known as a district that keeps its community involved, that cares

about what the community cares about and is going to listen” (Participant c1a1).

Participant c1a2 added, “having the stakeholders involved in the conversation is crucial to the success of the whole thing.”

Another example of how internal and external stakeholders have been included is with the development of the school district’s strategic plan. Four years ago, an external company was contracted to ask open-ended questions about the school district in a virtual environment. Once the original responses were compiled they were sent back to internal and external stakeholders with the request that they prioritize the original feedback. The process generated data for stakeholder work groups to develop the district’s strategy (Participant c1a1). “Everything that’s in the existing plan came out of those stakeholder workgroups to include the strategies and indicators of success. So, this is not something that the superintendent dreamed of” (Participant c1a2).

Building level leadership teams (BLLTs) are involved in the ongoing activities surrounding the strategic plan such as assessment of progress, measurement of outcomes, and reformulating goals and indicators. The BLLTs represent each school’s team with the principal, assistant principal, and a rotating group of volunteers (grade level representatives, counselors, department representatives, and parents) (Participant c1a2).

I think they do like a three-year cycle, so you’re committed for three years and then you rotate off and somebody else can step in. So, that gives opportunities for everybody, all of the teachers and parents and any classified to be involved. (Participant c1a4)

The BLLT process is further explained as:

So, they’re bringing their experience from the building level and then looking at the district plan and saying, “Okay, here’s how it’s contributing, how it’s working,” and then making some general recommendations in terms of what we need to

adjust so that it works better where the rubber meets the road with kids and teachers. (Participant c1a2)

There are the school district's over-arching goals and then each of the BLLTs develop their building goals in alignment (Participant c1a4).

The BLLTs have their time, those retreat days where they can look at these goals and say, "Okay, what areas do we need additional support?" Whether that'd be resources or curriculum or time for the teachers, it gives them that opportunity to breathe because teaching is you know sprint, sprint, sprint; it gives an opportunity to breathe, to look at the goals and say, "Are we still on track? Do we need to change something?" So that part's been really good too. (Participant c1a4)

One of the school district's instrumental initiatives has been to align curriculum across all grades and schools to insure children are successful as they progress to higher grades. This process involves representatives from each grade level throughout the system working together to look at standards, gather data and samples, try them out, share with colleagues and ask for input (Participant c1a4).

What I tell them is, "I'm the facilitator, you guys are the experts. So as we look at this, of course we have to have standards that we're comparing it to, but you are the final decision. You guys as a team get to make the decision of which curriculum, which instructional materials we're going to use." (Participant c1a4)

The school district's inclusion of internal and external stakeholders is best summed up as " a continuous process. Everybody has a chance to have input. Not everybody uses those opportunities but they do have the opportunity and we listen to it." (Participant c1a2)

Awareness of internal and external forces. The earlier subsection on the human connection thrust establishes participants' awareness of the district's internal forces. Participants also detailed external forces at more macro levels.

At the societal level, there is the perception that, education people are struggling to find their happy place because they don't feel like they're being valued. So, we do what we can to try to help with that as much as we can in our small part of the world. (Participant c1a4)

Additionally, the state faces a shortage of qualified teachers.

Last year we hired 26 new teachers and this year we've hired 18 new teachers. Some people have either retired or some moved on, but in the state where we're struggling with finding teachers, that concerns us just a little bit that what's it going to look like next year. (Participant c1a4)

Other concerns include how union negotiations can be challenging because of "pay and the inequity that's across the state and again the superintendent and I both understand" (Participant c1a4). This environment can be a recipe for conflict and distrust although Participant c1a4 noted the superintendent had been effective with establishing trust and consistency within the trade unions.

The community is home to 12 distinct Native American Indian tribes. Understanding their history and how they were forced to live together on one small reservation helps to unveil why "they don't really like White people much and the trust is rightfully not in place" (Participant c1a2).

The community dynamics over the years have not always been positive. So, people have been together in the same place but not really working together. And so, we're trying to overcome that and our focus is to make sure that all of our kids graduate and have a future plan for their life and have the wherewithal to achieve it. (Participant c1a2)

Participant c1a2 also described how there are high poverty families, drug issues, criminal behavior, and parents in jail in the community. Some children lack parental role models with little support in social development until they start school. The review of recent third grade test data demonstrated this point as only 26% of third graders were at grade level (Participant c1a2).

We have about 26, 27 percent native kids but they are most of the kids with the attendance and discipline issues. But those go way beyond school. So to be able to successfully and I suppose the best word I could use is adroitly navigate the minefield that goes with that to get kids the assistance they need and to have our staff understand—our staff is not native, for the most part, there are a few folks that are but not very many—to get them to think and be culturally sensitive and understand the differences that kids come through the door with and then have an idea about what to do with and for each of those kids, it's a tall order but we're making progress on it. (Participant c1a2)

As participants reflected on the challenges with the school district's internal and external forces, they remained optimistic and shared how it comes down to focusing on engaging children.

Art, academics, and athletics—One of these three areas is the hook that gets the kid in the door in the morning. If we can get them here, we can help change their trajectory. And that's the gospel of the whole thing. (Participant c1a2)

These different examples demonstrate an awareness of the internal and external forces that exist and impact the school district and its children. This cognizance paired with the human connection thrust and the inclusion of stakeholders establishes how the school district pursues its focus on continuous improvement.

Focus on continuous improvement. The school district's understanding of the internal and external forces serves as a compass to its continuous improvement focus as it endeavors to create a future for every child (Participant c1a1). Earlier sections of this case context discussion introduced examples of how stakeholders have been involved in the strategic plan development, BLLT responsibilities, the facility planning initiative, and curriculum adoption work. The district's focus in these areas over the last four years helps to overview its continuous improvement process which includes assessing its internal and external forces, establishing vision and focus, setting goals, prioritizing, aligning activities and evaluation, measuring progress; and then reflecting,

reassessing, and refocusing to move things forward, which was depicted earlier in Figure 4.2.

The participants described simplicity and alignment as two crucial components to their continuous improvement work as these both allow schools to focus and move in the same direction. The school district's commitment to establishing positive interventions for its children and their families demonstrates this point. Participant c1a4 described, "that's one of the streamlined pieces that we've been developing, is what that looks like, what the support looks like, what the interventions look like, how to intervene, how to document that intervention" (Participant c1a4). This is further explained:

So, we are trying to keep the tools that we are working with on behalf of kids simple and constantly in our sight and the simpler the better. It's just one or two important goals and then the discussion about how we're making progress and how we keep the score and how we're progressing. (Participant c1a2)

We ended up taking off some of the initiatives that just weren't lined up. So, we were doing good things, good practices, but it wasn't what we were wanting to accomplish so we just kind of let them die their natural death. The grants would come up and we'd say, "You know what, that doesn't line up with what our goals are. We're not going to pursue that. We are going to let that go." (Participant c1a4)

The district has on occasion been the recipient of different grants that may have taken away from the overall program rather than added to it. So now we stay real focused and intentional on what our direction is and what our programs are and try to gain resources to support those specific things. (Participant c1a3)

By simplifying the focus and aligning the schools (and their initiatives), the school district can be more impactful with its practices and actions for children.

My perspective is that some of the greatest minds in the world that changed how everybody lives and thinks and works were just one person. So, we don't know who the next Einstein or who the next Kennedy or Martin Luther King, we don't know if they're one of those folks that's just walking around our campus right now. Our job is to make it possible for them to rise to that level. So, that is what we are trying to do. (Participant c1a2)

“If you get those small pieces together, the big indicators at the end, whether it’s the state test or some beginning and end of year assessment that you do, those things will come out right” (Participant c1a2). The importance of the district’s processual approach to continuous improvement and the need to evaluate progress is summed up by:

So, you look at those things and you track them. And if its starts to go awry then you start asking why and what are the causes, who are the players, what’s the problem. Now my folks are asking those questions of themselves, not to the level across the board that I would like it, but they’re doing it, whereas a couple of years ago when we started the thought had not even occurred to them. (Participant c1a2)

Evolving context. The leaders perceive that their emphasis on a human connection thrust facilitates the inclusion of stakeholders in the district’s focus on continuous improvement; and, the work environment appears to be evolving due to these influences. Some of this is driven by a work-in-progress mindset. “We continue to focus and say, ‘What can we do to make us even better?’ And I think it’s been good. I think it’s been a good experience” (Participant c1a4). “It’s not a whole effort to find out what’s wrong, it’s to find out what’s right, sustain that and then find out where you need to further engage the process to improve and get that done as well” (Participant c1a2). In this vein, the initiative to voluntarily pursue systems accreditation is viewed as an opportunity that will help to guide the district in how to be even better with a more global perspective. One of the leaders pointed out:

We’ve gotten some things right but there are some things that we’re still missing . . . back to doing the self-assessment; we’ve already looked at each other and said, “Wow, we’re really missing some strokes here.” And that’s what I want. I want my leaders—the teacher leaders and administrative leaders—to see that for themselves and acknowledge it and recognize it and then help figure out the strategies to change it. (Participant c1a2)

Shifts in practices, actions, and behaviors also exemplify an evolving context. For example, the actions of soliciting input from stakeholders have led to changes in the protocol for teacher professional development. Participant c1a2 reflected that when a stakeholder group was gathered to review the strategic plan and the district's progress teachers said, "You know, we don't have control of our professional development so we're getting things sent to us for professional development that we don't necessarily need. We need to be able to help contribute to that." This feedback resulted in the adjustment of professional development practices so "that was a really important piece of information to have as we go forward" (Participant c1a2). Another example is the gift of time, which was established in the district with early release Mondays (also known as professional development Mondays) as a way to support the inclusion of internal stakeholders in the district's important initiatives and to cultivate more human connection (Participant c1a4). Participant c1a3 explained, "we've put in place early release Mondays where we've given staff time to collaborate."

The focus and alignment with continuous improvement appears to be influencing behavior in students as evidenced in the following reflections:

An eighth-grade boy who is frequently on the wrong side of justice came into the cafeteria not realizing that he had missed his cycle for lunch. He wanted to eat lunch with the seventh and eighth graders and they were already gone and the sixth graders were there and we said, "You can go eat, it's okay. Do you want to?" He said, "Well, yeah, I'm hungry I want to be in here." I said, "Okay, fine." And he went over and he got his lunch. That sounds like a small thing, but if you've been around middle school kids, being with your peer group is huge. But he felt open enough to talk to the principal and to me and not be intimidated, even though he was what you might call a frequent flier, and then go ahead and do what he wanted to do and have his lunch and sit down and relax. And then he came back when he finished. He said, "Well, I guess it's too late to go outside with the other kids so I'll just try to go to class. I'm thankful. See you guys later." That tells me a whole lot about how he feels in the building, how he feels about being at school. (Participant c1a2)

Participant c1a2 described the problems that are prevalent in public school transportation, and proudly noted that no incidents had occurred this past year. He indicated that video recording all bus rides had been instrumental in shifting negative parent behaviors, and shared:

I was watching a video on a bus yesterday and the significant thing that you could see and hear—and this was in the morning—the kids are laughing and happy. And it's like wow, that's what we want. They're excited, they're coming to school, they're ready to go. And when I see them go home at the end of the day, they still got a smile on their face, they're a little bit more disheveled but maybe tired, but they're happy, they're respectful to each other. (Participant c1a2)

These shifts in the School District's context suggest that together the human connection thrust and inclusion of stakeholders in continuous improvement initiatives may be the impetus for these changes as depicted in the illustration of relationships in Figure 4.3. The next section briefly summarizes this case's context and details the GTM research question for Phase II of this study.

Summary

This chapter has documented the analyses that has been utilized to discern the context of the participant organization which is central to this study. The participants' reflections detailed in the case context discussion help to expand on the data presented earlier with the thematic, categorical and content analyses. Together these illuminate how the leaders perceive the school district and offer a contextual understanding of the case. To conclude the following tentative or preliminary hypotheses were formulated based on the case study analysis:

- The school district's leaders are focused on relationships, involvement, and communication, and they perceive these core commitments generate a connection with stakeholders.
- The leaders' intention is for this human connection thrust to support the inclusion of stakeholders in a focused and processual approach to continuous improvement that advances its vision of graduating 100% of its students.
- The human connection thrust and stakeholder inclusion in the continuous improvement process seems to influence the organization's practices, actions, and behaviors.
- The human connection thrust and stakeholder inclusion in the continuous improvement process appears to shape an evolving work context.

As this conclusion intimates, the district's leaders deliberately focus on relational practices and behaviors that perpetuate the inclusion of internal and external stakeholders. Namely, their focus on relationships, involvement, and communication is the impetus for stakeholder inclusion; this is the foundation for continuously improving the district's education and support programs as it endeavors to create a future for every child which is the school district's mission.

This first phase of data collection and (case study) analysis were instrumental to discovering the context of the participant organization. The participant organization's leaders demonstrated intentions and actions that are indicative of practices and behaviors of inclusion. Given the leaders' perceptions and their descriptions, I was curious about the experiences of employees in the schools, and this curiosity led me to explore the following research question in Phase II of the data collection: How do

employees in the schools experience these practices of inclusion? Answering this question will be the focus of Chapter V.

Chapter V: GTM Dimensional Analysis and Results

My earlier chapters have highlighted the unique design of this study utilizing a case study approach in Phase I and grounded theory in Phase II to explore the complexities associated with inclusive leadership. The last chapter detailed Phase I of the research with an in-depth discussion on the context of the case which highlighted the leadership's perspective on the organization. This chapter explains Phase II of the study, and how grounded theory was used to explore what was happening at the ground level with the district's school employees. This chapter presents the grounded theory portion of this research with first an explanation of dimensional analysis, second, an overview of the Phase II research process, and, third, a description of the emerging core and primary dimensions with explanatory matrices. The chapter concludes with a summary of the GTM findings.

Dimensional Analysis

Grounded theorist Leonard Schatzman (1991) became attuned to the challenges faced when analyzing grounded theory data over the course of his teaching career when working with graduate research students. He "identified a gap between the teaching of research mechanics and the specific analytic processes involved in the definition and interpretation of data that lead to theory building" (Kools et al., 1996, p. 313). Drawing from Blumer's (1969) concept of symbolic interactionism that identified how people's interactions influence meaning making (pp. 4–5), Schatzman raised the importance of this gap by developing dimensional analysis to give grounded theory researchers "the ability to address the complexity of phenomenon by noting its attributes, context, processes, and meaning" (as cited in Kools et al., 1996, p. 315). This

form of analysis aligns with second generation constructivist grounded theory as it recognized that both researchers and participants are involved in the process of making meaning of complex phenomena. Kool et al. (1996) described dimensional analysis as involving a set of operations including dimensionalization/designation, differentiation/explanatory matrices, and integration/reintegration.

Dimensionalization and designation. When dimensionalizing, a researcher is viewing data through the lens of context, conditions, processes, and impacts. This provides structure for understanding the dimensions that emerge from the data, and the process of designation occurs simultaneously. “Designation is simply the naming or labeling of dimensions or properties observed in the data. Through designation, the investigator develops a vocabulary with which to continue analysis” (Kools et al., 1996, p. 316). Once the researcher has established the key dimensions, she transitions into the use of explanatory matrices for a deeper understanding of the data.

Differentiation and explanatory matrices. Differentiation is described as “the limiting of data by determining the salience of dimensions and organizing them into a logical configuration that provides them with meaning” (Kools et al., 1996, p. 329). The use of explanatory matrices in traditional GTM occurs as a part of the (axial) coding process; however, in dimensional analysis these serve a different function as they are the “cornerstone of the analytic process” (p. 317), providing structure and context for explaining the social processes. The explanatory matrix allows the researcher to capture the complexity of their findings within a framework that focuses on the context, conditions, processes, and impacts. These help with deciphering what is happening

which, in turn, facilitates structure and context for explaining the data (Kool et al., 1996; Schatzman, 1991).

Integration and reintegration. Upon reaching theoretical saturation, a researcher “integrates dimensions and their components according to the central, organizing perspective” (Kools et al., 1996, p. 319). This final stage is where the explanatory matrix serves as a vehicle for integrating the dimensions and components for interpretation of the data and moving into modeling.

These operations elevate the rigor associated with GTM as this form of analysis “provides researchers with the analytic tools necessary to conduct analysis systematically and to communicate about the analytic process with clarity” (Kools et al., 1996, p. 328). The dimensional analysis operations described here were utilized to analyze the GTM data in Phase II of this study offering a structured approach to my data analysis process.

Phase II: Grounded Theory Research Process and Analysis

The grounded theory data collection commenced following the case study. The process was launched with the Superintendent distributing the IRB-approved invitation to school employees. Once participants submitted signed letters of consent, intensive interviewing took place to engage each participant in reflecting on their experiences of being involved in the Loma School District. This phase of the data collection comprised of 21 interviews with participants in principal, teacher, counselor, school staff, and other roles to insure a wide range of perspective across different functions and schools. These voices on the ground were instrumental to uncovering what was happening in the school district.

GTM's constant comparative method was essential in Phase II as it engaged me in the process of intensive interviewing, transcript coding, and memo-writing over the course of the grounded theory data collection. In addition, three trained GTM researchers also coded my transcripts during the first half of data collection. Their work was essential to the cross-checking of my coding to insure objectivity with the process. The iterative nature of interviewing, coding, and memo-writing served as the impetus for the emergence of different themes within the data. During the early interviews, details emerged on areas of focus such as academics and curriculum, resources and interventions, teams and buildings, school programs, and meetings types. Participants shared experiences with how people related, interacted, and communicated emphasizing perceptions and feelings on involvement, openness, and autonomy. By the midway point, codes were being sorted into the 18 emergent categories shown in Table 5.1.

The emergent categories served as the starting point for how data was viewed and later reorganized with dimensional analysis strategies. By the 14th interview, theoretical sampling was engaged to delve further into the experiences of those within an inclusive school setting. The Loma Park School was selected for theoretical sampling as 6 of the first 14 interviews were with Loma Park employees, and these participant narratives had illuminated descriptions that offered depth to the emergent categories. The theoretical sampling involved seven additional interviews and seven field observations. The theoretical sampling and field observations deepened emergent themes.

Table 5.1

Emergent Categories in GTM Coding Process

Emergent Categories
Academics and Curriculum
Alignment
Avenues for Interaction
Communication
Community Dynamics
Context
District Dynamics
Flexibility and Choice
Focus
Internal & External Forces
Involvement
Leader Influences
Meetings
Openness
Relationships
Resources and Interventions
School Programs
Team and Building Dynamics

The constant comparative method's iterative approach helped me to transition into dimensional analysis as I began the process of dimensionalizing. This entailed examining the data through the lens of conditions, processes, and impact from what the participants were describing as their experiences in the Loma School District. Typically, an assessment of context is included in the dimensionalization process but this was purposely set aside as the case study served to contextualize this organizational case during Phase I. The contextual relationships of this organization and aspects of culture and climate will be discussed in Chapter VI.

The following sections overview the core and primary dimensions that unfolded through the dimensional analysis process. The core dimension is detailed in depth as it serves as the over-arching dimension that is supported by each of the primary dimensions. Each primary dimension will be presented with specific attention to its processes. Participant narratives are shared to support the relevance of these essential dimensions that emerged within this single organization with inclusive leadership.

GTM core and primary dimensions. Participant interviews offered flavor to patterns of instability, distrust, and racism that were rooted in the school district's history. Stories were rich with explanations on how the schools were focused on positive interventions designed to address the present social and economic disruptions faced by children and families. Participants expressed passion for being involved in changes designed to improve the quality of education against the backdrop of pressing internal and external challenges. The interview data evidenced expressions of optimism and appreciation for having autonomy to make a difference in the school district's important work. Aspects of support, care, and openness flavored participants' descriptions of relationships, interactions, and communication as they intimated positive feelings about their work and its importance to helping children to be successful.

GTM's processes afforded flexibility with examining these imperative aspects of participants' experiences with inclusion; yet, its structure with the constant comparative method and the coding team insured my attention to details that were prevalent with the social processes in this school district. The transition from categorizing codes in the transcripts into dimensionalizing the data, and later differentiating, was instrumental to breaking down the narratives to understand participants' lived experiences. This

process the development of the core and primary dimensions to capture the essence of what was happening in the Loma School District.

Table 5.2 overviews the core dimension and its six supporting primary dimensions.⁴ These emerged from the dimensionalizing of the grounded theory data that reflected participant experiences at the ground level within the Loma Schools (Kools et al., 1996).

Table 5.2

Core and Primary Dimensions

Core Dimension:	Crossing Boundaries to Accelerate Progress
Primary Dimensions:	Building Connection
	Experiencing Openness
	Favoring Flexibility and Choice
	Engaging in Focused Work
	Making Changes to Overcome Negative Forces
	Feeling Positively at Work

Each primary dimension listed in Table 5.2 directly supports the core dimension of Crossing Boundaries to Accelerate Progress. The core dimension is unique as it represents the over-arching theme which is interlinked with the primary dimensions. It is the core dimension that is a distinguishing aspect of this study as it overviewed what was happening in this organization.

The sections to follow first present a full description of the conditions, processes, and impacts related to the core dimension, and then the details on each of the primary

⁴ In this study, the core dimension appears in text in title case, primary dimensions in italicized title case, and the processes within the dimensions in italicized sentence case (e.g. *Empowering stakeholders*). This formatting ensures that when such derived parameters do not get confused with the same words and phrases occurring in text and which were not derived from the analysis.

dimensions processes with brief references to conditions and impacts. Each subsection offers an explanatory matrix to represent the framework that highlights how conditions, processes, and impacts played a role in the dimensions that explained what was happening in the Loma School District. The matrices are supported by explanations and participant narratives. These are followed by a summary of the dimensions and their relationships.

Core Dimension: Crossing Boundaries to Accelerate Progress. From the beginning, participants reflected on the individual and group efforts that were happening regularly to insure momentum towards overcoming the difficulties faced by the Loma School District and its community. Participants in different roles, levels, and locations consistently shared the challenging circumstances denoting employees' understanding of the dynamics the school district faced while working to facilitate education for the public in accordance with state standards. Their high-level perspective, coupled with that of the participants, involved efforts in change intimated the ability of employees at varying organizational levels to assess circumstances from a whole system perspective and work towards overcoming the issues. This reoccurring theme pointed to how it was not just school district visionaries that contributed to the strategy and direction of this organization as participants demonstrated high level thinking and active involvement in improving the school district's circumstances.

Shared experiences included insights into how participants were working together to evolve change to cross the boundaries that they face, and in turn accelerate progress. Table 5.3 overviews the conditions, processes, and impacts that align with this core dimension, Crossing Boundaries to Accelerate Progress.

Table 5.3

Core Dimension: Crossing Boundaries to Accelerate Progress

Core Dimension	Conditions	Processes	Impacts
Crossing Boundaries to Accelerate Progress	<ul style="list-style-type: none"> Heart-Breaking Realities 	<ul style="list-style-type: none"> Thinking Broadly Involving People 	<ul style="list-style-type: none"> Organic Change

The following descriptions offered depth to how heart-breaking conditions were an impetus to processes of *Thinking broadly* and *Involving people* with the resulting impact of organic change.

Heart-breaking realities. As participants described the Loma community, it became evident that there were many realities that created boundaries for people in this setting. Some of these included poverty, social and economic issues, cultural injustices, natural disaster, and the overall state of public education. Participant G5e2 captured the essence of Loma’s challenges when describing the importance of the school district’s free meal program. The participant shared how important it was to provide breakfast, lunch, and after-school meals as this was the only food some children would get for the day. The reflection was that this was “heart-breaking but it was the reality.” Many participant reflections embodied this notion of heart-breaking realities faced by children and families in this school district as evidenced with the following participant thoughts:

Today, our poverty rates have climbed. We’ve lost our manufacturing. We used to have a very successful wood products industry here but that is pretty much gone. . . Since our poverty rates are so high, we know that a lot of our kids come out of traumatic situations. I have a little girl here, I asked her if there’s anything I could help her with and she said, ‘can you buy me some Lunchables’ so that she had food on the weekend. (Participant G5b5)

We have students that they’re in kindergarten and if they don’t get themselves up and ready and get on the bus, then nobody makes sure that they get to school . . . A lot of kids are homeless, they don’t have a home, they’re skipping from

family member to family member's house, sometimes they're sleeping in cars, they are staying in a hotel. They don't always have the food they need at home. A lot of my students have one parent or both parents that are not in the picture, they're either in jail or just out. They've lost custody of the kids. That's pretty common with the kids that I work with. They know when they come to school they'll have what they need. (Participant G5e2)

This is high poverty per capita, a very high number of drug users and babies whose mothers were alcoholics or using drugs before they were born. So, the per capita, the depression and mental issues and the learning disabilities are astounding to me as far as places I have lived. (Participant G7e4)

Alongside these daunting challenges, the Loma School District was also influenced by the negative circumstances in the public education sector.

The state of public education injected a series of dramatic influences as there was increasing tension with state budget instability, constraining legislation, low teacher salaries, a punitive evaluation system, and the overall negative stigma associated with the teaching profession. One individual summed up teaching as being a less than desirable career as no one wants to be in a profession where you work so hard for minimal compensation. Other participants emphasized how issues were not always internal but rather they evolved from the state level. Participant G7e4 noted:

I think the issue isn't always just a district issue and an administrative issue, it comes a lot from the state and then trickles down. Because certain administrators are required to follow certain rules and force you to do certain things that maybe you feel aren't appropriate for kids. So, there's a lot of weight coming down that shuts out that opportunity to feel listened to. I don't think it's just the district or just the administrators though, I think that it's just so far at the top that it ends up into a pile on the employees where it doesn't—I think in public education in general, it doesn't really feel like you have much voice.

This participant further described the challenges teachers face with the state evaluation system, which is a sentiment that was echoed by others:

People have been kicking and screaming against the state evaluation system for years and instead of improving the process, it keeps getting worse. People speak out and they write letters and we do it collectively and it still just becomes worse. And the administrators are required to follow through with this as well so it's not

really in their hands either . . . You give up more time to work with the kids, that's why we're here. So some people kick and scream for, "I want more time with my kids." (Participant G7e4)

These heartbreaking realities constituted boundaries that challenged the school district. The boundaries represented constraining forces that worked against the organization and its purpose to create a future for every child. These conditions evoked the two processes of *Thinking broadly* and *Involving people*.

Thinking broadly. When describing challenging internal and external forces that made up heart-breaking realities, participants exhibited a high level of understanding of these boundaries, and offered perspectives that demonstrated the process of *Thinking broadly* on factors that enabled them to cross boundaries to accelerate progress.

Participant G2b3 overviewed how earlier work with external consultants under the current superintendent helped to spearhead new thinking and broader perspective:

It really helped us focus with the right direction on how to prepare students for an unknown world. The example is that there are people in jobs today that didn't exist three, four years ago mainly it's because nobody thought about that being a job. For us to be preparing students for the jobs that are there right now is kind of outdated. We need to be preparing students to be thinking about jobs that haven't been invented yet because they need to be prepared for those jobs in two, three years with additional training or after four years with a college degree and preparing them to think outside the box. So, we really have the mindset of don't prepare them for today, prepare them for tomorrow and tomorrow's tomorrow. We've done that with enhanced technology and improved curriculum across the district. (Participant G2b3)

Another participant expanded on this, acknowledging that the main purpose of teaching is not specializing in subjects. The content is important but it does not take priority over the core subject of "creating citizens of the community, the state, the country; and working towards building the next level of leadership for our country" (Participant G4d10i). The connotation was that education is about building skill sets that allow children to be successful in life rather than passing on material. These

perspectives aligned with the school district's vision of creating a future for every child, and they exemplified how *Thinking broadly* brought together strategic thinking with global perspective. The elevated, more strategic level understanding of the school district's circumstances with positioning that embraced a global lens was further modeled with the following comments:

I think the school district has done several good things to bring itself to a level of sensitivity to the children that it serves, a heightened awareness of the challenges that our kids face at home and an empathy for those children that we don't bring the hammer down on kids. That we try to work with kids and we try to get into their heads a little bit and find out what's going on. . . We've seen a cultural change, we've seen a shift in our district that really works hard to graduate kids. I think we have a better sense in our district of future orientation. We are not just teaching kids how to be good at school but we want to teach kids how to be good at life. I have to give a lot of that credit to our superintendent. (Participant G5b5)

I would say our focus is preparing our students for the unknown world. That focus has kind of been two or threefold. We did not have a realistic, reliable curriculum plan. So, part of that was because our district, for a long time, had not been fiscally sound. . . With our current superintendent, we established we were going to rebuild and accommodate and follow a curriculum adoption. So that was helpful. (Participant G2b3)

Participant G5d1 deepened this with thoughts on how the school district endeavored to see beyond the borders of its own community as described with "trying to give our kids a more world experience."

The examples that emerged with the process of *Thinking broadly* illustrated a commitment to put children and their success front and center in the Loma School District. *Thinking broadly* correlated to the process of *Involving people* as the whole system perspective engaged strategic thinking and global perspective which naturally aligned with including people in efforts to overcome boundaries.

Involving people. The importance of the process of *Involving people* in overcoming the challenges faced in the Loma School District came across with a village analogy that was shared by a participant:

I kind of think of it as it takes a village to raise kids, they say that. And I think the school is part of your village but here in this school it takes every single one of us to make sure that these kids are getting what they need. And not just in regard to academics. There's kids that need a hug every day and they come in and give you a hug and tell you that they love you. And all of us working together. It might be one of the ladies working in the kitchen that the kids connect with. And that's the reason that they get up and come to school because there's somebody that smiles at them and gives them a hug. So, I just think it takes each one of us as a whole to work together to make the school function. (Participant G5e2)

This village analogy showed how *Involving people* was a requisite to crossing the boundaries presented by conditions of the heart-breaking realities. The analogy exemplified the need to involve the whole school to meet the needs of its children. The idea is that the entire school community is important in the process of educating and caring for students.

Involving people is not necessarily an intuitive practice within traditional hierarchies in organizational life as supervisor-subordinate relationships tend to be typified by top-down direct and tell behaviors. The Loma School District altered this tendency by bringing choice into this aspect of the workplace. Participant experiences often exemplified how opportunities to be involved rested upon choice and personal interests. This was illustrated in Participant G7e4's comment on what employees can be involved in. "It's totally like open to whatever they are passionate about and feel will help the school and students." This was furthered with:

I enjoyed being a part of that the BLLT team . . . you're not governing the school but you're making decisions to impact the school and I like being knowledgeable and I like having input in that process and so that was the place that allowed me to do that. There is a representative from all grade levels and so you got to hear a little bit more about what's going on . . . we might be looking at professional

development opportunities that we might be able to bring into the building. We look at facilities use, covering prep time for everybody. A little bit of that problem solving how to bring it all together and make it function smoothly. (Participant G5d6)

Choosing to be involved in school BLLTs illustrated an avenue for employees to engage in *Thinking broadly* to bring about changes cross the boundaries presented by heart-breaking realities. A field observation in the Loma Park School revealed representatives on the BLLTs were instrumental to guiding the direction of the school as the group was a conduit to addressing important academic and operational matters on behalf of the school. The field observation exemplified this as the BLLT group was focused on cost efficiencies, pre-planning for the upcoming school year, and professional development choices. Other field observations demonstrated that employees had choice in becoming involved. The technology committee meeting represented a forum for the processes of *Involving people* and *Thinking broadly* as it allowed the group to dialog and make decisions on different matters. The observation showed how people in different functions worked collaboratively to explore a technology investment involving a large sum of funds. The process of *Involving people* led to discussion on needs, efficiency, and relevance. Together those involved in the technology committee weighed the options and came up with a plan that spearheaded the impact of change. This was not orchestrated in a top-down manner rather it was facilitated in an organic.

Organic change. The impact of organic change in the Loma School District derived from the processes of *Thinking broadly* and *Involving people*. The example of the school BLLTs not only evidenced these processes, it provided specifics on how these processes led to the impact of organic change. Both field observations of the

BLLT and Technology Committee demonstrated how initiatives in these forums were driven by employee voices rather than leader directives. The exchanges evidenced discussions around investments, efficiencies, and strategies that were driven by employees resulting in organic change. One participant summed up the impact of organic change as it derived from processes of *Thinking broadly* and *Involving people* as “helping people understand the ground is fertile so all that is needed is to grow things, and administration will help with tending the ground by adding water and fertilizer” (Participant G5b5).

Primary Dimension: *Building Connection*. The primary dimension of *Building Connection* evolved under the conditions of positive influences that advanced the process of *Interacting collaboratively*. This process was delineated in the different ways that people interacted in the Loma School District and community (see Table 5.4).

Table 5.4

Primary Dimension: Building Connection

Primary Dimension	Conditions	Processes	Impacts
Building Connection	<ul style="list-style-type: none"> • Positive Influences 	<ul style="list-style-type: none"> • Interacting Collaboratively 	<ul style="list-style-type: none"> • People First Stance • Quality Relationships

The impacts of this primary dimension and its process of *Interacting collaboratively* led to the impacts of a people first stance and quality relationships with children, families, teachers, colleagues, unions, district administration, and the community.

Many participants explained the condition of positive influences in relation to leaders. Participant G5d19i described one principal: “He is not a top-down administrator

and so I think fosters goodwill and good feelings from his staff. They feel appreciated.”

Participants’ descriptions made it evident that experiencing equality was a positive influence as explained by Participant G5e2:

He just treats everybody the same as long as you’re working hard and doing your job . . . I never feel like he holds himself higher. I don’t know, like that he’s better than me . . . anybody from the janitor to the teacher who’s been here the longest, he treats everybody the same and encourages everybody . . . It’s just appropriate. It’s like even though we have people with their doctorate and people who have an associate, nobody is like I’m better than you or know more than you. Like everybody just kind of works together to do what’s best for the kids and they support each other. (Participant G5e2)

Conditions of positive influences were also described by participants as when leaders showed care and conveyed value to them as evidenced in comments such as:

Our grade level chair spends a great deal of time outside of her work day taking care of us. She goes down, she meets with the principal when there are issues that need to be discussed. She comes back and communicated them right away with us. She is willing to advocate for us and she is a great person for that because she has such grace about her. (Participant G5d6)

My job can be all over. It can be emotionally draining and you put in a lot of hours, a lot of hours you don’t get paid for. And sometimes you have days where you feel like you’re not doing enough, but when you get a little note like that, you know that you are doing enough and that you’re helping the kids. And it seems like our boss sees us, he sees what we’re doing. Even though we might not see him every day or talk to him every day, he just makes us feel important. (Participant G5e2)

My principal is willing to advocate for things. He will advocate for our building to receive professional development, he’ll advocate for time for the staff to learn . . . He tries to create opportunities for that to happen. (Participant G5d6)

These reflections pointed to how participants favored conditions that allowed them to experience equality, caring, and being valued. These conditions of positive influences were an important component to the process of *Interacting collaboratively* within the primary dimension of *Building Connection*.

Interacting collaboratively. The process of *Interacting collaboratively* was instrumental to connection experiences in the Loma School District as it was situated in a range of practices and behaviors that brought people together through interactions. Illustrated in Figure 5.1, *Interacting collaboratively* exemplified how people interactions encompassed listening, discussing, exchanging, sharing, supporting, advocating, and conveying value. This positive mixture of interactions involved behaviors and practices that were described by participants and observed in field observations. While some of these interactions surfaced in other dimensions in this study, they are featured in this primary dimension of *Building Connection* as they directly influenced how people connected. Figure 5.1 illustrates how these interaction types were fluid and ongoing. They built upon each other and encouraged the capacity for organizational members to face challenges, work through difference, counter silos, identify disconnect, and heal past punitive behaviors.

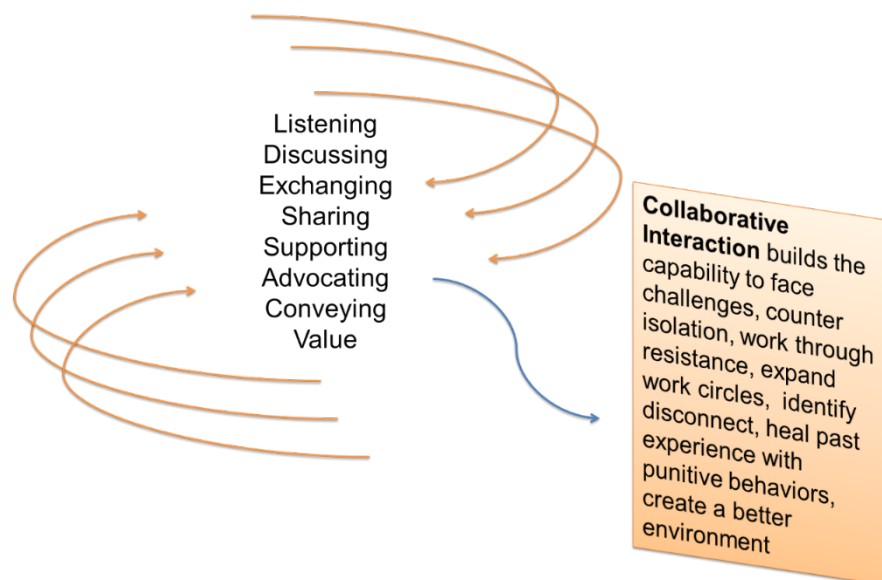


Figure 5.1. Collaborative interaction.

Several participants expressed value in listening, discussing, exchanging, and sharing within their work settings, and participant descriptions showed themes to be synergistic and interrelated in nature. Listening (and being heard) was viewed as a quality aspect to interactions in work environments as shown by the following comments:

I feel like it's nice to be listened to, it's nice to be sought for opinion and feel like you are being validated. Like it's not just listening for the heck of it, it's really listening and putting that to purpose. (Participant G5d19i)

One thing I like about those committee meetings is I feel like I'm heard. I feel like I'm valued. I feel like what I have to say is important in those meetings. People listen and use my ideas. It makes me feel good. I'd rather be in a meeting where I feel I have something I can contribute. (Participant G8g7)

Other components to the process of *Interacting collaboratively* entailed discussing, exchanging, and sharing which evidenced communication and interaction was not directive (or from one direction) as characterized in traditional hierarchical and/or supervisor-subordinate relationships. Participant G5di explained, "Our team lead is not a hand-me-downer of things. She likes to hear what we think and she likes it to be a collaborative collection of us working together to figure out what makes sense." Another participant outlined how the process of discussing, exchanging, and sharing unfolded in a work group:

I think when you're working together it takes a lot of pains to figure out how to all work together as a team . . . for the person that facilitates for the truancy board, there's kind of a check off form. She kind of goes through it and reads it and asks what do you think, what do you think, and then adds things if we think there's more things we want. And if any of us have ideas of other things we might want to add. Then amongst each other we will ask "what do you think? I think that's a good idea, that's a bad idea." (Participant G8g7)

Participants spoke with enthusiasm about opportunities to learn from peers describing how sharing and exchanging best practices were important to professional

development and overall collaboration in the education process. “You’re out there, you’re trying to find innovative ways to teach, how do you reach those kids that aren’t getting it and sharing those ideas and having those discussions with staff” (Participant G5d6). Participant G5d1 furthered this with:

And there’s opportunity to talk about things all the time, it’s just whether you go out there and you ask for those conversations. I really like to find out what my counterparts are doing with classroom management, stuff that’s working for them. And if they have a challenging student that maybe I know and I see one of my students that has similar behavior, what are they doing to be successful with that student. That’s a big piece to share, is what we’re doing to be successful in our classrooms.

Supporting, advocating, and conveying value were also components to the process of *Interacting collaboratively*. Participant G5e2 reflected on how her supervisor conveyed value to her:

He does little things all of the time just to thank us for taking care of these kids and everybody working together . . . He’ll just leave a little sticky note on everybody’s doors telling you one positive thing that you’ve been doing that he notices. And it’s a little thing, but I think it’s important. It’s a little thing that some people might be like, ‘Oh whatever,’ but I think it’s a big thing. It’s a little thing that makes you feel like you make a difference.

These practices and behaviors evidenced both formal and informal patterns of communication, and helped to establish how people built connection in the school district. Seemingly fluid and ongoing, the process of *Interacting collaboratively* is crucial to the primary dimension of *Building Connection* as it directly influenced positive interactions with colleagues and supervisors from all levels in the school district. These relational interactions were rich in potential as the impacts were a people first stance and quality relationships. As described by Participant G6b9i, “relationships are the critical element of everything that we do . . . if you take care of the teachers, teachers take care of the kids and the parents will be take care of so that’s the cycle.” In this

school district, the process of *Interacting collaboratively* was energized by conditions of positive influences. The practices and behaviors of listening, discussing, exchanging, sharing, supporting, advocating, and conveying value captured the relevance of *Interacting collaboratively* which extended to people in different levels and roles. These engaged an infinite emphasis on relational practice and fueled the impacts of focus on people and relationships. Together, these aspects made up the primary dimension of *Building Connection*

Primary dimension: *Experiencing Openness*. As participant stories unfolded, I was struck by how frequently the concept of *openness* was used to characterize experiences. The term *open*, helped participants to describe people’s world views, thought processes, internal actions, physical feelings, communication types, teaching approaches, leader behaviors, support to children, and evolution of change. The data reflected 47 distinct codes related to *Experiencing Openness* with participants using a range of phrases to delineate this primary dimension including open door, open thought, open attitude, open forum, open communication, open discussion, efforts to be open and welcoming, and open to doing new things to delineate this dimension.

The descriptions on *Experiencing Openness* were deep and expansive uncovering how conditions of open atmospheres and attitudes influenced the process of *Communicating* (see Table 5.5). In turn, these resulted in the impact of awareness.

Table 5.5

Primary Dimension: Experiencing Openness

Primary Dimension	Conditions	Processes	Impacts
Experiencing Openness	<ul style="list-style-type: none"> Open atmosphere and attitudes 	<ul style="list-style-type: none"> Communicating 	<ul style="list-style-type: none"> Awareness

Communicating. The Loma School District's conditions of open atmospheres and attitudes influenced the process of *Communicating*. The GTM data evidenced weighted emphasis on communication practices of frequent exchanges (68 codes), listening (47 codes), and sharing (57 codes). The process of *Communicating* and these related practices unfolded in the following descriptions:

Interaction on a regular basis. Interaction in the hallway. I personally make it a point to have relationships with my colleagues and my administration just because it feels good and all of these people are a huge resource . . . there are a lot of people here who have been here a lot longer than me and have seen what I'm seeing 10 times over and it's a huge resource to be able to communicate with those people. And I think the communication piece of it is a huge piece of building trust . . . I'm looking for new ideas all the time. So, we get an opportunity to learn from each other both formally and informally on a daily basis. (Participant G5d1)

Communication, we work on it all the time. And it's amazing to me even when you think you have communicated well, you have to continue to do checks and balances with communication because of interpretation. We are always working on communication. (Participant G6b9i)

There is constant communication on a daily basis, and we officially sit down to meet together to do their planning for the week. So, there is always that constant communication back and forth between staff out in the classrooms . . . I usually say, "Hey, do you mind just kind of brainstorming with me? I have a question and I don't know quite how we take it. I'm interpreting it this way, how are you interpreting it?" And then we kind of work back and forth to try to provide the information that is needed. (Participant G5e11)

These reflections were indicative of communication practices occurring within direct work groups as well as expanding circles of work where different roles and levels were involved in key initiatives. These also occurred in exchanges between subordinates and leaders as mentioned by Participant G5d1:

Not only literally is the door open, but my principal is always open if I have challenging situations with a student . . . always open to have a conversation and really be a shoulder. He always listens to what you have to say and then gives ideas.

The process of *Communicating*, within the primary dimension of *Experiencing Openness*, evidenced how people engaged with each other through mutual exchanges.

Participant G5e11 described exchanges as:

With communications back and forth, we do a lot of email contact and whenever I need to shoot an email out to the district office, it's a really quick reply and it's always very professional . . . They're always very open and welcoming if we have a concern, a question or comment that we reach out and touch base. So, that communication back and forth has been, from my experience so far, pretty open and pretty welcoming.

The action of back and forth communication showed reciprocity in exchanges.

The process of *Communicating* and its components of listening and sharing were notable aspects to the primary dimension of *Experiencing Openness* as they influenced the nature of exchange surrounding disagreement and difference. Participant G5e2 shed light on this explaining:

I said, "this is how I feel." And I just told him, "honestly, I feel like this is what we need to do." And I basically presented it to him and he listened and agreed with me. And something he had said before was, "this is not going to happen. This is how we're going to do this." We tried it the way that he said and it wasn't working for three of my students and I went in and provided the documentation to him and he listened to me and he agreed with me and he revised it.

Another relevant reflection demonstrating listening and sharing within the context of disagreement and difference was:

Each grade level shared where they were at, pros and cons and how they see it being used and then that just kind of led to that open discussion. A discussion in staff meetings in these settings is usually pretty amicable. It's just pretty calm, people are pretty respectful and listening to others' comments and opinions. And even though they may not agree with them, I guess tensions usually don't rise. People are able to share their thoughts and they're willing to be open and listen to that. Although they may not change their minds and they may not agree, they do listen respectfully. (Participant G5d6)

These reflections were important as they evidenced an openness to listening and sharing, which led to the impacts of an awareness of unproductive circumstances and

change to improve things. Other instances of listening and sharing that resulted in the impact of awareness surfaced across a range of topics on efficiencies with student and staffing ratios, finances, and student programming. Often topics uncovered varying perspectives representative of disagreement, and yet these aspects of difference were viewed objectively. Participant G5e18i reflected on a decision to move a student to the next grade or hold him back. She mentioned open dialog was invited and how she felt welcome to share her reasoning, “No one made me feel bad, even though I disagreed with their original thinking” (Participant G5e18i).

Working through disagreement and resistance was something participants tended to address as an afterthought. There was an element of comfort when participants talked about instances when people were not in agreement. The following comments established that the primary dimension of *Experiencing Openness* created an atmosphere where disagreement became palatable as the process of *Communicating* alleviated silos and tensions that typically accompany it. Participants explained:

Rarely do we have a meeting where we all agree on the issue, but we agree that we have the solution to the issue and we’re going to go with it. We don’t walk away from it any different. I mean, we are still co-workers and have a good relationship. (Participant G1a13i)

It’s always been where if we need any clarifications, if it’s a misunderstanding because I’m not quite understanding, that people are always patient to try and explain so this is where I’m coming from, this is what I’m thinking. And so it’s always kind of, like I said, a very back and forth communication with each other. I think even if it comes down to it, we handle it as grownups and that’s okay. I agree to disagree with you. If we’re not going to see eye to eye, that’s fine. You can have your opinion on the situation but I’m going to have mine and I’ll respect yours and I hope that you respect mine. But to be quite honest, of the time I’ve been here, I don’t feel like there’s ever been at time that it’s gotten to that point . . . to be upset with each other, to try and hold a grudge would just be super difficult. It would affect our working environment, it would affect the kids we work with and just that negative energy I’ve never really felt it. (Participant G5e11)

We just kind of work through the process of conversation and try to come to a decision that we can all deal with. Sometimes you don't get everybody to agree on one thing, but we do come to a decision that everybody can live with.
(Participant G5d6)

These comments denoted how disagreement was a received aspect in the work environment where participants endeavored to listen and share as they worked through difference. The process of *Communicating* through listening and sharing came across in the differences experienced between new and tenured employees. Participant G5d15i contrasted how new and tenured employees had a completely different frame of reference:

As the years go by, some of us who have been around a long time and still think the standards of the past are in place, sometimes we are a little shocked to find that not everybody either adheres to or even knows about some of the things that were accepted in the past as this is the standard for our building. And we've had to work through that a lot . . . it's supposed to be this way, why is it this way? We have had a lot of conversations in which we found out, those of us who have been around, that sometimes the new teachers have never heard that this is the way things are done, and then we reexamine should it still be an expectation in our building? (Participant G5d15i)

In this case, the participant described how tenured colleagues were open to seeing things from new employee's perspectives. They reflected on their own assumptions about how things were done in their school, and began to re-assess what really made the most sense as practices from the past were not necessarily still relevant. Here the process of *Communicating* led to the impact of awareness propelling people forward as they worked through difference and disagreement.

The value of the impact of awareness was highlighted when Participant G5c14i explained, "Everybody has a world view. The problem is when that becomes the norm for what a world view is. That's problematic for a teaching staff in this world that is very diverse . . . that simply doesn't happen here." The primary dimension of *Experiencing*

Openness illuminated how conditions of open attitudes and atmosphere were an impetus to the process of *Communicating* which resulted in the impact of awareness.

Primary dimension: *Favoring Flexibility and Choice*. The primary dimension of *Favoring Flexibility and Choice* emerged as participants shared irrefutable preferences for having input and decision-making opportunities. A common theme that surfaced was how value was placed on autonomous work conditions as these allowed for processes of *Painting the picture* (deciding how) and *Individualizing* (choosing to serve uniqueness). These in turn fostered the impacts of freedom to be oneself and ownership (see Table 5.6).

Table 5.6

Primary Dimension: Favoring Flexibility and Choice

Primary Dimension	Conditions	Processes	Impacts
Favoring Flexibility and Choice	<ul style="list-style-type: none"> Autonomy 	<ul style="list-style-type: none"> Painting the Picture Individualizing 	<ul style="list-style-type: none"> Freedom to Be Oneself Ownership

The strength in the condition of autonomy was elaborated on by Participant

G7e4:

It’s very interesting when people do have the level of autonomy to choose their team, choose their task, it really is motivating intrinsically and people do come together and make things happen and they feel empowered. I always think if you don’t trust their professionalism or that they learned anything in school, then why are you hiring them? So sometimes I feel like there’s that leadership style that always thinks they need to keep your feet in the fire, or thinking that that’s going to make you a better employee when really the exact opposite is what is found in research. And I feel like this school is a good example of giving people autonomy over their time and task and their teams and giving them a chance to do something they’re passionate about.

Participant G5d19i expanded on the value of autonomy referring to how her supervisor “has been very good about trying to empower us in the building to feel like

we contribute to decisions, to feel like our voices are heard and we can impact decisions.” This individual further emphasized how the approach is empowering rather than punitive. These comments established the value employees perceive with conditions of autonomy; and how conditions of autonomy fostered the processes of *Painting the Picture* and *Individualizing*. *Painting the Picture* was a phrase used to depict having the opportunity to decide how you proceeded with your work; *Individualizing* overviewed how participants had the leeway to choose to serve the individual needs of people. The GTM data totaled 125 codes in support the primary dimension of *Favoring Flexibility and Choice* with heavy weight to choice (57 codes), autonomy (34 codes), and individualism (21 codes) all of which supported the processes associated with this primary dimension.

Painting the Picture. The process of *Painting the picture* was used to describe value in deciding one’s path. It was also explained as making choices and decisions, having input, using your own ideas, doing things in your own way, and/or doing things in a different way. Participant G5d1 explained:

We are given the expectations and we are allowed to take our own path to those expectations. It’s not that each step is outlined, but we’re given what the end result expectation is and then we’re able to use our own skills and personalities to get to that point.

This thought delineated what it meant to engage in the process of *Painting the picture*. This participant continued by highlighting how there is value in having the freedom to do work in a way that allows you to own it:

I guess I feel like coming from previously being a manager, it’s kind of like running my own little child business. You are training them to do different things but the way that you present that is you. We’re not told how to teach things. We’re given the training to show us different ideas and strategies on how to show our kiddos, how to do different things, and how to put the curriculum to good use; but it’s our job to go through and decide what that looks like for our classroom.

And my principal would never come into my classroom and say, “Oh, you’re not doing that right.” He puts a lot of trust in us to do what we’re supposed to, but also, like I said, when you’re surrounding yourself with people with strong personalities, you can’t necessarily expect them to do it your way either. So, he gives us a lot of opportunities to be ourselves in our classrooms. (Participant G5d1)

The reference to running “my own little child business” was an illustration of how employees favored flexibility and choice as it offered freedom to be oneself and to own one’s work. Participant G7e4 expressed similar sentiments:

That was empowering to feel like I did have the ability to draw lines in what my job is and how much I am able to take on and continue doing this job, continue doing it well . . . so, I felt like I was able to kind of paint the picture as far as what was my deep-seated philosophies are in education and being allowed to continue with that philosophy as my cornerstone to work. So, my philosophies are embraced.

In this example there was reference to the participant’s personal philosophy on education and how the process of *Painting the picture* allowed for the impacts of owning one’s work and being one’s self. The process of *Painting the picture* was described in other ways that featured being different, giving input, and having choices either as an individual or as a part of a work group as shown with the following thoughts:

I think we have input into what we are doing; here is the target given by the district and we help develop that, how we get there, that path gives us a lot of flexibility from the district. Our group said, “Hey, this is what we’re trying to do. Here are our academic scores, this is now aligning academics, this is how we fit and these things go along with what the district is trying to do.” (Participant G6b9i)

We have a lot of flexibility and we all teach differently. We all think different pieces are important and we have that flexibility to go up and say, “You know, this group that I have in my room right now might not need as much practice with this skill but they definitely need some practice with this skill.” So, we can go through the curriculum and really pick and choose what we want to focus on with the students. (Participant G5d1)

In these cases, individuals or groups are given the flexibility to make choices about what is best in the work environment. Choice was also uncovered in an example pertaining to one of the district's key initiatives involving technology usage. Both field observations and interviews uncovered how several teachers had opted to incorporate a new software program for student use with their end of year project presentations. While technology was a district focus area, participants clearly articulated there was choice with technology:

We have a technology person that came in and did this presentation and really it's just kind of this is out there for you. Hey, if it works for your classroom, if it works for your paradigm, then this is a really cool thing. So that's an opportunity for those that do use it to really share some of the ways that they're using it and some of the ways they're not using it and for those of us who don't use it, maybe some ideas of how we could get that in our classrooms. (Participant G5d1)

You have to have buy-in; you can't just tell them this is what it is, but you know a lot of this is if you can show them and walk them through it and they can understand it or they can see what kids are doing with it, you're going to get more buy-in, more willingness to open that iPad carton and give it a try. (Participant G5d6)

These comments evidenced how participants engaged in the process of *Painting the picture* by choosing if new technology worked for their classrooms. They *Painted the Picture* based on what fit well for their situation with the students in their class. This allowed for the impacts of freedom to be oneself and ownership with their work decisions.

There were instances where participants contrasted circumstances that were not conducive to *Painting the picture*. In these cases, sentiments were that people did not typically respond well to being micromanaged. Participant G5b5 expressed:

Teachers don't like to be told what to do. They really don't. They've got a good education, most of them have master's degrees, they have very strong opinions of how a classroom runs and what they need to do to make their classrooms successful, and they don't appreciate interference, unless it's interference they

chose. So, if a teacher says, “I really want to have this training or I would really like to have this program in the school,” and they initiate that, there’s a huge amount of personal power and time put into that. (Participant G5b5)

Building on this, Participant G5d15i emphasized, “When we work on something it’s something that we feel like we need to do, not just something that somebody thrusts upon us.” Another participant considered “blanket” things to be representative of micromanagement, and shared:

You have to do so many performance tasks a year. Those are like blanket requirements everybody is supposed to do and it can feel a little pressing . . . it is tasks I think teachers have done in the past, but just in the beginning when it was presented the way we had to write them up, it was lengthy and time consuming, seemed a little redundant. Kind of just like one more thing I think teachers felt was on their plate. (Participant G5d19i)

This perspective on “blanket” things contrasted with how participants described being more receptive to approaches that involved giving input and having choices. Participant G4d19i explained this as: “It’s not a blanket everyone will do this. It’s who is on board? Who is interested? Who wants to try it? And then I think once things like that are successful, word of mouth spreads it.” This helped to show the importance of being able to *Paint the Picture* as it was an open path for participants to choose the direction of their work resulting in the impacts of being oneself and ownership.

Individualizing. The process of *Painting the picture* was important as it conveyed the importance of the primary dimension of *Favoring Flexibility and Choice*. The process of *Individualizing* expanded on the idea of *Painting the picture*, evidencing how in addition to deciding the path participants were willfully engaged in making choices to support uniqueness. More specifically, the process of *Individualizing* entailed making choice to support need and uniqueness. Making these choices insured all children were afforded opportunities and support to be successful. In this respect, this

process was about addressing each child's uniqueness and needs to insure they were successful members of the group.

The teaching specific term *scaffolding* was used to describe how instruction is individualized to each child's needs as further explained by a participant:

Teachers can watch a child do something and do the assessment in their heads, make their notes and then move on to the next kid and know how to fine tune for that child the next day . . . they scaffold everything and I watch them do it and it's just incredible. (ParticipantG5c14i).

Scaffolding was an essential component in these school settings. In addition to the use of the scaffolding approach with assessment and instruction, the field observations evidenced specific activities that extended the process of *Individualizing*.

A field observation of a grade level meeting evidenced how teachers were reviewing student placements into classrooms for the upcoming year. The meeting involved a one by one discussion of each child's needs to determine the best classroom placement based on fit for each individual. A number of factors were considered when engaging in the process of *Individualizing* and assessing the best learning environment for each child. This entailed developing the classroom environments to be representative of rich diversity across a range of backgrounds and abilities. In this case, *Individualizing* took into consideration academic and behavioral performance, language and special education, as well as factors to each child's personal support system. Decisions were finalized based on the optimal learning scenario for each child evidencing the process of *Individualizing*.

The processes of *Painting the picture* and *Individualizing* emerged from the conditions of autonomy. These resulted in the flourishing impacts of freedom to be oneself and ownership, which shaped the primary dimension of *Favoring Flexibility and*

Choice as well as influenced other dimensions of experiences of people in the Loma School District.

Primary dimension: *Engaging in Focused Work*. The primary dimension of *Engaging in Focused Work* involved conditions of a ground up approach that influenced the process of *Empowering stakeholders* with the resulting impacts of intentional improvement and alignment. Table 5.7 highlights this primary dimension’s process of *Empowering stakeholders*, which had significance in the Loma School District as the process resulted in the impacts of alignment and intentional improvement.

Table 5.7

Primary Dimension: Engaging in Focused Work

Primary Dimension	Conditions	Processes	Impacts
<i>Engaging in Focused Work</i>	<ul style="list-style-type: none"> • Ground Up Approach 	<ul style="list-style-type: none"> • Empowering Stakeholders 	<ul style="list-style-type: none"> • Alignment • Intentional Improvement

Empowering stakeholders. Descriptions by participants spotlighted empowerment in a variety of focused initiatives to help the school district move forward. These extended across academics and operations with heavy emphasis on efficiencies and needs. Participant G5d19i explained over time she had been empowered to contribute to various focused work initiatives such as the BLLT, the leadership learning team, the special education team, literacy groups, and the technology committee. “It’s just kind of what has interested me at the time or what I have had time for” (Participant G5d19i). Reflecting on being empowered to engage in improvement initiatives, Participant G5c14i explained:

The truancy board added a lot of life to what I do. It truly has because it’s that holistic thing. You’re working with families, you are working with kids that are connected to people. And helping kids try to find that one person in their school

that is the person they can build a relationship with and then they'll maybe feel beholden to get to school to see them . . . it's a wholeness. You are not just dealing with an isolated child. You are dealing with a child in the context of the community. (Participant G5c14i)

Here the process of *Empowering stakeholders* lent itself to positive interventions that were based on bringing about improvement that is aligned with each child and family's needs. The truancy board evidenced how an empowered work group was aligning a focused initiative to address behavioral challenges with this positive intervention. In addition to evolving the impact of alignment it brought intentional improvement addressing ways to bring about better circumstances for children in trouble.

Another example of the process of *Empowering stakeholders* is the Loma School District's curriculum adoption and alignment work initiatives. Participants discussed these at length acknowledging the importance of this work in school settings.

Participants explained:

What we do, we have a curriculum that has been adopted by the district and that's usually done with input from a district committee that is put together across grade levels, depending on what the curriculum addresses. So, say if it's a curriculum for writing, they would assemble a committee of teachers interested in giving their input on that. And then they take that back to their building, get that input from their colleagues and the take it back to the committee where the decision is made. That's when the curriculum is adopted. (Participant G5d12)

In the curriculum alignment meeting we usually go over some questions and talk and share about our classes. We will have different levels there. So, all of us talk and we share and that is good because then the elementary realizes they are preparing for our classrooms and we realize what the elementary teachers do. (Participant G2d8)

Being empowered to engage in the curriculum adoption process engaged stakeholders in the importance of curriculum alignment throughout the school district. The impact of alignment further emerged when Participant G5d15i emphasized

“everyone at grade levels is aiming for consistency. So, working together as a grade level team gives us that chance to offer a more consistent educational opportunity to students across the grade level.” Participant G5d12 added, “we were all assessing by different measures. With the curriculum adoption with K-5, now everybody is using the same curriculum, similar format, components.”

The process of *Empowering stakeholders* to lead curriculum work allowed for attention to understanding children’s unique needs as mentioned by Participant G5d12:

As far as how we use the curriculum, we meet usually two times a week in our grade levels and we work together to kind of make sure that we are aligned, we’re all teaching essentially the same thing . . . where are you this week, where will you be at the end of next week. Then also deciding things. This year we have a bit of an interesting group as far as what their skills are so we’ve had to kind of adapt the curriculum to address the needs of these students. We discuss a lot. We work together as far as what are you seeing, this is what I’ve done, this is what I’ve had to supplement, have you had to supplement anything? And then we sometimes share those things. (Participant G5d12)

The focused curriculum work is a commitment to the school district’s “plan between grades, between buildings, so that’s looked at and marked out” (Participant G2b3). The importance of this focused work is that “teachers work together to get an idea of what skills and abilities to work on with kids to better help prepare them” (Participant G5e11). Another participant elaborated:

One thing we are currently working on is finding a universal way that we can share reading scores that mean something to all of us. And so, I think finding that tool that we can use to assess our kids and report growth that allows for consistency as you pass through the grade levels, that’s something that I see all of us are feeling a need for. We’ve recently updated our diagnostic assessment and we just had a meeting about it and how we see it and if it’s useful. Everybody has had experience trying it out and so everybody, for the most part, is on board that this is a good tool and so recognizing that it’s a good tool that we’ll have the whole staff using it and reporting on a common measurement for this assessment. (Participant G5d6)

Again, the process of *Empowering stakeholders* lent itself to impacts of alignment and intentional improvement. The focused work with the truancy board and curriculum adoption initiatives exemplified how stakeholders from different levels, roles, and locations were empowered to engage in a manner that influenced alignment and improvement with behavioral challenges and learning transitions. In these cases the conditions and processes of the primary dimension of *Engaging in Focused Work* illuminated these impacts.

Primary dimension: *Making Changes to Overcome Negative Forces*. As the earlier description of the core dimension highlighted, the district and its schools face a range of negative forces. One of the re-occurring themes in participants' narratives was a focus on *Making Changes to Overcome the Negative Forces*. This primary dimension is characterized by conditions of working amidst challenging internal and external forces as seen in Table 5.8.

Table 5.8

Primary Dimension: Making Changes to Overcome Negative Forces

Primary Dimension	Conditions	Processes	Impacts
Making Changes to Overcome Negative Forces	<ul style="list-style-type: none"> Challenging internal and external forces 	<ul style="list-style-type: none"> Facilitating Positive Interventions Embracing inclusive thinking and action 	<ul style="list-style-type: none"> Progress

These conditions have influenced processes of *Facilitating positive interventions* and *Inclusive thinking and action* with the resulting impact of progress.

Facilitating positive interventions. Participants across roles described positive interventions that were improvement initiatives to provide support and resources to children and families to overcome obstacles associated with social, emotional, and

learning challenges. The positive interventions encompassed areas such as literacy, nutrition, learning disabilities, physical, and behavioral needs. Participant G8g7 expressed:

It's really nice having the truancy board so the kids aren't going to court. They're not going into that courtroom, they're coming in front of the truancy board and explaining what it is that's going on in their lives and the reason why they're not coming to school and then we're able to get the help for them that they need so that they can be successful about coming to school. Because usually there's a reason why they're not coming to school. It could be a health reason, chemical dependency, or transportation. (Participant G8g7)

Another example of the process of *Facilitating positive interventions* entailed being involved in an ACES (Adverse Childhood Experiences) committee at one school:

People with high ACES scores have a higher risk of all kinds of health problems as adults. People with higher ACES scores often grow up in homes where there's a person who is mentally ill or chemically dependent or they have been abused. The ACES committee tries to come up different ideas to start working on things that are related to kids with high ACES scores. (Participant G8g7)

In detailing her experiences on this committee, the participant shared the group is supported by various full and part-time employees and community groups. She reflected further:

What we have been working on is because with teachers it's like there's always a new program and a new idea and sometimes it's like the same thing just repackaging it. So, rather than doing any big changes and talking about ACES, we are talking about doing drips of information to them. ACES for our students is also looking at self-care for taking care of the teachers themselves. (Participant G8g7)

Other collaborative efforts that demonstrated the process of *Facilitating positive interventions* were teachers working together with counselors and staff to address behavioral and/or health related needs. The Loma Park School coordinated efforts with the local resource room and staff when children had immediate needs such as soiled clothes or lice or behavioral challenges. Field observations evidenced careful

communication between teachers, counselors, and staff as they insured immediate needs were met for children. The interviews and field observations uncovered a keen attentiveness by staff in all roles to the needs of children, and this process of *Facilitating positive interventions* resulted in the impact of improvement. One participant quantified the impact of improvement explaining that *Facilitating positive interventions* in one school had decreased the number of behavioral referrals. At the time it was approximately 200 incidents less than in the prior year (Participant G6b9i).

This primary dimension of *Making Changes to Overcome Negative Forces* and its process of *Facilitating positive interventions* were stimulated by inclusive thinking and action where stakeholders were engaging together to facilitate interventions that helped individuals and groups in need regardless of the individual and/or group affiliation(s). *Facilitating positive interventions* insured students had the support to overcome all types of challenges which revealed the process of *Inclusive thinking and action*.

Inclusive thinking and action. The process of *Inclusive Thinking and Action* embraced the relevance of individuals and groups of all types working together to address the unique needs of all children in the Loma School District. The process of *Inclusive thinking and action* was best highlighted by reflections on the diverse student demographics in the Loma School District being a mix of Caucasian, Native American, and Hispanic populations, Participant G2b3 shared:

That is a combination that statistically you wouldn't think would work, and yet our students make that work on a daily basis and build friends across lines. So that piece is really, really impressive. That spills out into how our students are hopefully teaching our parents how to interact because we do have parents who grew up in a different time frame.

Another description expanded on this aspect of diversity:

When you have three different cultures that are together, you have the white group, you have the Hispanic group, and you have the Native American group, and there's different cultural values in each of those groups . . . it's a matter of understanding that, honoring that and then helping that child. (Participant G5b5)

Diversity as a priority was beautifully modeled in small yet meaningful ways. One of the schools multi-cultural programming was described as including children in the planning and presentation of school assemblies open to parents and the community with children presenting in English, Spanish, and Salish as these represent the three native languages to the area (Participant G5e2). Participant G5b5 framed the richness to diversity in the Loma School District with:

You build relationships. You build your classroom into like a family, into a little community of learners. And the fortunate thing for us is we have most children who are Native American and Hispanic than we have Anglo kids. So, kids of color are not considered unusual in this building . . . The kids here they don't really look at race or color, they're kids and they all play together and they get along.

Another refreshing perspective on diversity in the Loma School District was that "today's students, for the most part, I don't want to say are color blind, they obviously see the color, but it has less of an impact with the cultural issues that may historically be there" (Participant G2b3). This participant noted children have grown up together as peers and been friends so they don't know anything different, mentioning:

Our students are the ones who are inclusive and support each other so that it's less of a mandate and direction and more of a student expectation . . . so, they've grown up in a culture where we all work together so race isn't something that—if there's a bit of segregation, my students wouldn't even allow for that. They are the ones who help make sure that's managed on a day to day basis. (Participant G2b3)

These reflections offered perspective on how the process of *Inclusive thinking and action* involved people (students and employees) in inclusiveness. Feeling included

spoke to any type of insider/outsider relationship not just ones defined by race and ethnicity. Participant G2d8 explained:

I have noticed with the special education students, the students in the classroom are very patient with them. They don't make fun of them and they usually don't mind being paired with a special education kid. They are very cooperative.

Another example came from an outsider's experience with moving to the Loma community:

They first usually ask what is your job, what are you doing . . . what do you need and where do you come from? They want to know about you personally but then they also want to ask things about how they can help . . . sometimes people would come down with a pile of books or a bookshelf or this or that and say, 'Do you need this?' And I would be like 'Yeah, actually I do.' So, I always felt excited to have the chance to talk about what I was doing and how we were going to work together, what our roles were. The offer of help was just really – I love that about a small town, people are always willing to share. (Participant G7e4)

Coming into a new community can position someone as an outsider, yet in this instance the individual has been welcomed in a way that conveyed she was valued and included.

This dimension of *Making Changes to Overcome Negative Forces* was stimulated by the processes of *Inclusive thinking and action* and *Facilitating positive interventions* where stakeholders were engaging together in improvement initiatives to help all individuals and/or groups in need of support. The process of *Inclusive thinking and action* allowed for a whole system perspective that established relevance to the positive intervention actions which resulted in the impact of improvement. Ultimately, this dimension exposed how people of varying backgrounds, preferences, and levels were involved in processes that embraced and supported diversity and needs within the Loma School District as it endeavored to Make Changes to Overcome Negative Forces.

Primary dimension: *Feeling Positively at Work*. The primary dimension of *Feeling Positively at Work* emerged as every participant described feelings of affection, enthusiasm, and/or passion about their relationships, experiences, and/or contributions in the Loma School District. As outlined in Table 5.9, the conditions for this dimension encompassed a positive, supportive setting, which advanced the process of *Having positive emotions*. This led to the impacts of passion and optimism.

Table 5.9

Primary Dimension: Feeling Positively at Work

Primary Dimension	Conditions	Processes	Impacts
Feeling Positively at Work	<ul style="list-style-type: none"> Positive, Supportive Work Environment 	<ul style="list-style-type: none"> Having Positive Emotions 	<ul style="list-style-type: none"> Passion Optimism

Having positive emotions. The process of *Having positive emotions* left several participants reflective of prior experiences in other work settings. Contrasting past work in schools, district offices, and other types of educational organizations as well as positions held in different professions and industries, participants described less supportive work conditions. Participant G5e11 explained:

Before I came to work with the school district, I was employed with another job who I felt didn't provide the guidance to me that I needed to complete my job and I kind of always felt that I was walking on egg shells. Like I didn't know if I was doing what I was supposed to be doing, resources were not offered to me. When I came to work with this school district, it was such a night and day experience for me. So, it's been, nothing but a positive experience.

This participant further distinguished the work conditions in the Loma School District from a past work environment emphasizing:

I couldn't ask for a better working environment working with a better group of people, I have been very lucky. I think it's really comfortable here, and I compare it back to my other experiences where at my other employer, it was just kind of I had my own little corner of the office but not very much positive interaction.

Whereas here, I can just leave my door open and you hear people and little feet coming by, “Good morning. How’s it going?” People take the time to actually just have a minute to chat with you and to see how your weekend was. I feel like we’re very much involved with each other and try to help each other out . . . I think we can see too that because the kids are just so positive and happy and I think it definitely has to do with the positivity around the building. (Participant G5e11)

Participant G5c14i pointed out that the positive, supportive conditions were influenced by leaders sharing “the speed of the leader is the speed of the building.” This comment was used to describe how the leader sets the tone for things in the work place: “I have worked for enough principals that were not respectful, that had favorites . . . that had a particular world view that they felt was the right world view and there was no room for another world view” (Participant G5c14i). This perspective demonstrated former work conditions that were not supportive and positive. Another individual explained how she left public education for a period because her voice was not heard when injustices were occurring. Others lamented about the lack of understanding and respect in former settings:

I have been in other schools where there is so much paperwork and it is so tedious and you don’t have any support. The paper work is just thrown at you and you’ve got to do it whenever there is time and they don’t give you enough time. Here they give you extra days. It’s nice that they value that time in this district. (Participant G2d8)

Participants detailed these past work experiences by way of articulating the value they placed on the process of *Having positive emotions* at work in the Loma School District.

The process of *Having positive emotions* was uncovered in how participants shared sentiments of appreciation and affection for current work experiences. *Having positive emotions* about work was voiced in different ways such as being engaged and working together. Participant G2d8 felt positively about her school sharing:

I just love this school district. It's just wonderful. The staff is supportive . . . the thing I like about this staff is everybody is engaged. The school I came from, they were not. During professional development, you'd have people sitting in the corner talking about other things like sports. It's better than any school I've been in . . . Just dealing with students and doing a good job and this type of thing is really cool. We all work together to try to make it a good experience for the students . . . They have the best support here of anything I've seen. It makes me feel good. It makes me glad I'm here and it makes me glad to do my job. (Participant G2d8)

This reflection pointed to the relevance of positive, supportive conditions as they are the impetus to *Having positive emotions* at work. Other participants built on this, expressing how being supported and feeling valued contributed to this process:

I'm fortunate that I love coming to work every day. The school environment here is awesome. Our administrative staff and everybody kind of supports each other and it's just nice. It's nice being able to come to a job that I love . . . I think the overall trust and morale of our building is exceptional. You don't find that in very many places. (Participant G5e2).

It's always been really positive for sure. It makes me feel important and respected . . . They have always made me feel important, like I said, and listened to. I don't know what else to say, but it's always been pleasant for sure. (G5e11)

I think that the trust is there because we are professionals, we're intelligent individuals, we have passion for what we do, our leadership has confidence in us that we are, like I said, not only doing what we're supposed to do but we're able to do it in our own way. I think it makes us feel more satisfied than if we were having to conform to someone else's way of getting that job done. (Participant G5d1)

These comments unveiled how the process of *Having positive emotions* at work involved aspects of trust, respect, and even love; and these advanced impacts of passion and optimism. These impacts fueled participants' feelings of appreciation. Many reflections included appreciation for leaders as they were viewed as a key influence in the school's climate. The impacts of optimism and passion that emerged were also attributed to accomplishments. Participant G5d12's comment below helped to establish this point with a reflection on the Loma School District today compared to years prior:

There are definitely still some places that we need to grow, but I would say that it has definitely evolved to the point that as far as locally, I feel very optimistic about our district. There were days when it was very hard to come to work because our buildings weren't being maintained, they were leaking, we didn't have janitorial services, our parking lots were falling apart.

Another expression of optimism included, "It's funny, in this building I can walk through the halls and everyone looks you in the eye, they smile, they say 'hi' . . . this building has a good feeling. It has a good vibe to it" (Participant G5d19i). Another participant described one school as having an amazing climate noting when you teach kids "you have to be positive with them so much and you're nurturing so much that you tend to nurture everybody" (Participant G5b5).

As the above comments show, participants expressed appreciation for positive, supportive work conditions which influenced the process of *Having positive emotions* and led to the impacts of passion and optimism.

Summary of Dimensions

Over the course of Phase II of the data collection and the dimensional analysis processes, interview narratives were dissected and reconstructed to understand participant experiences. Dimensionalization and designation led to the emergence of seven different dimensions from the interview data. This chapter examined the dimensions through the lens of conditions, processes, and impacts to gain an understanding of the data's complexity. The structure offered with the GTM differentiation strategy supported the development of the explanatory matrices for each dimension. Table 5.10 summarizes each dimension by presenting the core and primary dimensions along with their supporting conditions, processes, and impacts.

Table 5.10

Explanatory Matrix: Summary of Dimensions

Core Dimension	Conditions	Processes	Impacts
Crossing Boundaries to Accelerate Progress	<ul style="list-style-type: none"> Heart-Breaking Realities 	<ul style="list-style-type: none"> Thinking Broadly Involving People 	<ul style="list-style-type: none"> Organic change
Primary Dimensions	Conditions	Processes	Impacts
Making Changes to Overcome Negative Forces	<ul style="list-style-type: none"> Challenging Internal and External Forces 	<ul style="list-style-type: none"> Facilitating Positive Interventions Embracing Inclusive Thinking and Action 	<ul style="list-style-type: none"> Progress
Experiencing Openness	<ul style="list-style-type: none"> Open Atmosphere and Attitudes 	<ul style="list-style-type: none"> Communicating 	<ul style="list-style-type: none"> Awareness
Building Connection	<ul style="list-style-type: none"> Encouraging Leader Influences Expanding Work Circles 	<ul style="list-style-type: none"> Interacting Collaboratively 	<ul style="list-style-type: none"> Quality Relationships People First Stance
Favoring Flexibility and Choice	<ul style="list-style-type: none"> Autonomy 	<ul style="list-style-type: none"> Painting the Picture Individualizing 	<ul style="list-style-type: none"> Freedom to be Oneself Accountability
Engaging in Focused Work	<ul style="list-style-type: none"> Ground Up Approach 	<ul style="list-style-type: none"> Empowering Stakeholders 	<ul style="list-style-type: none"> Alignment Intentional Improvement
Feeling Positively at Work	<ul style="list-style-type: none"> Positive, Supportive Work Environment 	<ul style="list-style-type: none"> Having Positive Emotions 	<ul style="list-style-type: none"> Passion Optimism

The relationship between the core and primary dimensions is important to understanding what is happening within the Loma School District. Figure 5.2 presents a visual representation of how the primary dimensions are fluid and interconnected. It depicts how the primary dimensions built upon each other in support of the core dimension. Each of the primary dimensions reinforces each other in a swirling manner to bring about momentum with overcoming the impact of internal and external (negative)

forces in the school district and its community, which were boundaries that needed to be crossed. The behaviors are constructive with a positive emphasis, and therefore generative propelling the organization towards core dimension of Crossing Boundaries to Accelerate Progress.

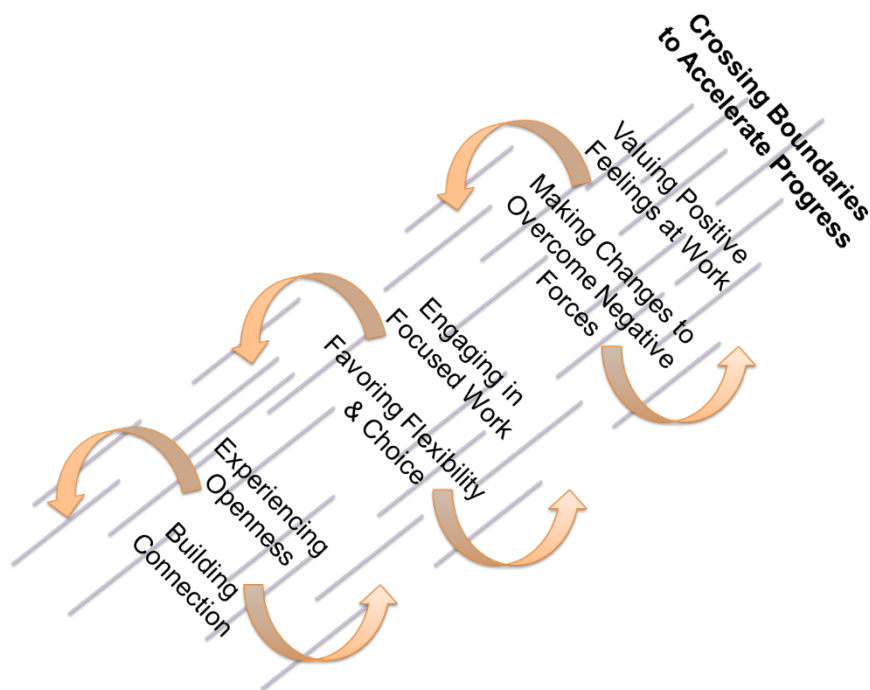


Figure 5.2. Core and primary dimension relationships.

The value of this GTM research is best summarized with how Holloway and Schwartz (in press) postulated:

A distinguishing feature of grounded theory is the deliberate pursuit of theory grounded in experience of persons inside the phenomenon of interest . . . this privileging of the experience of the persons inside the phenomenon and the subsequent building of theory based on their sense of the world, positions the method as particularly strong for Equity, Diversity, and Inclusion [EDI] research and application of this research to practice. The nature of grounded theory questions the centrality of participants and their stories; the exploration of the interaction between self and self, other, systems, and generated theoretical propositions; and theory grounded in the data are elements that powerfully connect the method to EDI studies. (pp. 6–8)

Holloway and Schwartz's (in press) premise established how GTM has offered a synergistic fit to understanding the intricacies of inclusive leadership. Aspects of inclusion are heavily influenced by relational, communicative, and participative components in the behaviors present in inclusive organizations. Positioning participant viewpoints as central to understanding processes in the Loma School District system illuminated this organization's behavior as it pertains to inclusive leadership, inclusive practices and values, and inclusive organizational contexts. Insights from the GTM results discussed in this chapter were essential to the development of theoretical propositions that can facilitate development and learning for organizations and members. Chapter VI overviews a set of theoretical propositions for future practice and research with further discussion on the research findings, modeling, and implications for practice and future research, based on the case study and the GTM findings.

Chapter VI: Discussion, Modeling, and Implications

Earlier chapters have described how this multiple method study was designed to broaden the scope of scholarship in the emerging area of inclusive leadership; and conjointly, deepen our practitioner understanding of how inclusion brings about optimal organizational behaviors for practical application purposes. Chapter VI examines this study's findings as they pertained to inclusion's presence in organizational life within the case of a single school district. It summarizes the overlapping findings of the case study and grounded theory research with specific attention to the Loma School District's focus on human connection and intentional change against the backdrop of an evolving contextual setting. Visuals are presented to illustrate essential aspects of the study including the overlays of climate and culture within the evolving context of an inclusive organization. This is followed by the introduction of four theoretical propositions with discussion on how these are grounded in extant literature. The chapter concludes with: a briefing on this study's implications for leadership practice; limitations to the study; recommendations for future research; and closing remarks.

Summary of Case Study and Grounded Theory Findings

The design of this study paired the use of a case study approach with GTM to explore the complexities associated with inclusive leadership, inclusive practices and values, and climates and cultures of inclusion. These aspects of inclusion were examined and analyzed in the data collected from 25 interviews, seven field observations, and document reviews relevant to the organization's historical events and current strategy. The case study and grounded theory findings pointed to several overlapping themes that were present within the context of an organization

characterized by inclusive leadership. The case study's interviews with school district office leaders established the contextual aspects of this case. The fundamental case study themes that emerged from a leadership lens were the presence of a human connection thrust based on relationships, communication, and involvement; inclusion of the school district's stakeholders in a processual approach to focused improvement efforts to address internal and external forces; and an evolving context within the school district setting that was perpetuated by the organization's practices and behaviors. The grounded theory portion of this study uncovered employee perspectives on seven dimensions to organizational life exposing conditions, processes, and impacts that drove the evolving context that was present within the Loma School District. These comprised of the core dimension of Crossing Boundaries to Accelerate Progress which was supported by the primary dimensions of *Making Changes to Overcome Negative Forces, Experiencing Openness, Building Connection, Favoring Flexibility and Choice, Engaging in Focused Work, and Valuing Positive Feelings at Work*.

Figure 6.1 provides a visual overview of the overlapping findings that emerged from the case study and grounded theory data sets.

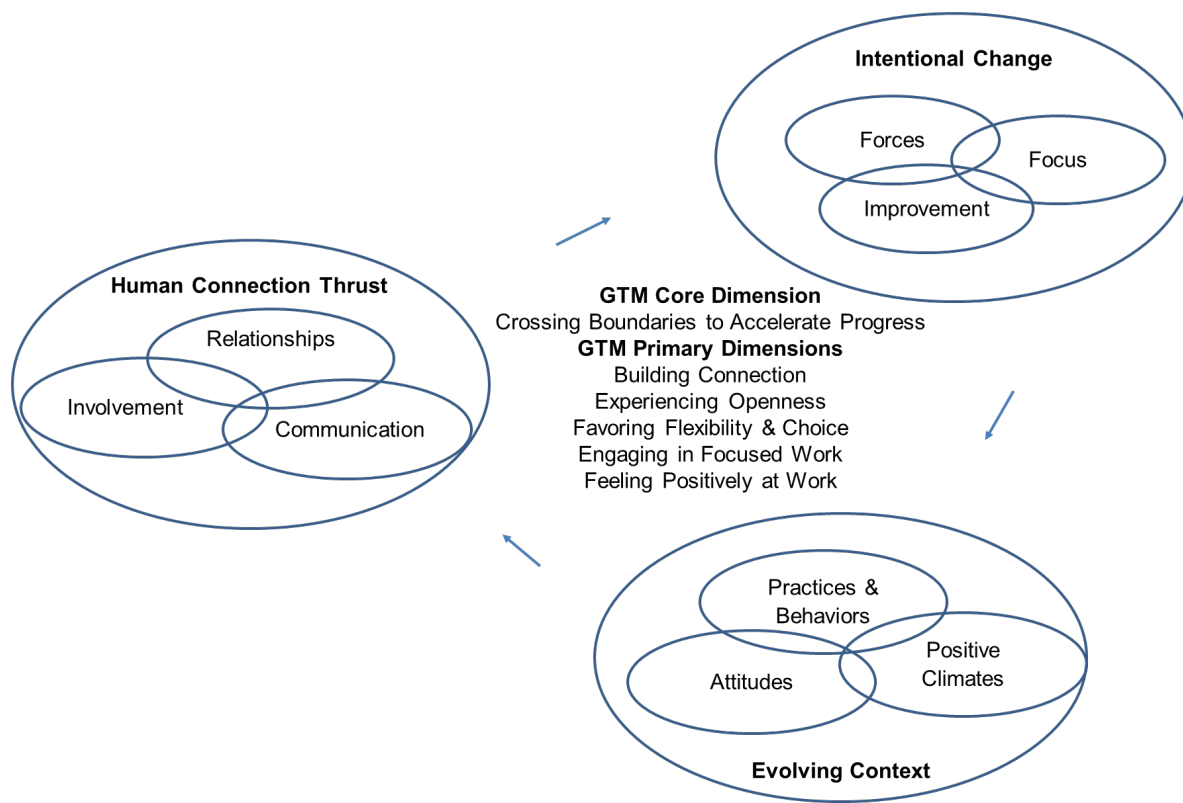


Figure 6.1. Overlapping case study and grounded theory findings.

The figure presents three circles that represent each of the case study themes from the leadership's perspective on the human connection thrust, inclusion of stakeholders in continuous improvement, and an evolving context. The GTM core and primary dimensions are featured in the center of the circle diagram depicting how these dimensions are central to organizational life as they are the connective tissue within the cycle of inclusion in an inclusive organization. In this manner, the GTM core and primary dimensions linked the context of this case to processes that were occurring across the micro, meso, and macro levels of the organization. These GTM dimensions brought to life how individuals and groups were engaging in processes that served in a connective capacity. The case study's emphasis on human connection correlated to ground level

experiences that emphasized the importance of relationships, communication, and involvement through the social processes of *Building Connection, Experiencing Openness, and Favoring Flexibility and Choice*. The human connection thrust directly influenced the second key premise that emerged in the case study which was the involvement of stakeholders in continuous improvement efforts to overcome internal and external forces. This same focus surfaced in the GTM data where participants described processes that involved them in improvement efforts to overcome heartbreaking realities. These emerged out of the GTM primary dimensions of *Engaging in Focused Work, Making Changes to Overcome Negative Forces*, and the core dimension, *Crossing Boundaries to Accelerate Progress*. These aspects to the GTM data built upon the improvement focus as participant narratives confirmed their involvement in change processes and initiatives within the Loma School District. High levels of stakeholder involvement and choice were drivers to organic change. Overall, this evidenced how intentional change evolved across levels within the organization.

Figure 6.1 also established that the GTM dimensions mingled together as they propagated a fluid cycle of inclusion that influenced the human connection thrust, intentional change, and an evolving context. The core dimension of *Crossing Boundaries to Accelerate Progress* remained prominent in the dimensions establishing its overlapping influence with how the main themes of human connection, intentional change, and an evolving context propelled the organization's inclusion cycle. Figure 6.1 illustrates a cycling of inclusion where the drivers of human connection thrust and intentional change motivated specific practices and behaviors. These influenced positive climates and attitudes that were a generative force within the inclusive

organization. This figure sets the stage for how the flowing dynamics within an inclusive system's processes influence climate and culture in an interconnected manner.

Together the case study and grounded theory findings reinforced one another as participant language, experiences, and perceptions from the micro, meso, and macro levels of the organization echoed the human connection thrust, intentional change, and an evolving context evidencing extensive overlap in the findings. This is representative of how Creswell (2014) particularized the benefits of qualitative research as leveraging text and image data with unique data analysis steps and diverse designs as a vehicle for involvement in a "sustained and intensive experience with participants" (p. 187) to establish meaning of a phenomenon from the point of view of those involved in the research. Triangulation was used to confirm the overlapping findings that emerged from the participant experiences in this case study and grounded theory research. The study's findings were triangulated in six ways to validate this research as detailed in the next section.

Triangulation of findings. This study advanced qualitative validity as multiple techniques were leveraged to triangulate the findings (Creswell, 2014). The triangulation strategies comprised of:

- A multiple-method research design using case study and grounded theory to explore the perspectives of participants across a range of roles and backgrounds within the context of a single organizational setting;
- A combination of interview, observation, and document review data to reinforce findings;
- Member checking procedures for accuracy with the interview transcripts.

- Structured, iterative GTM processes to preserve objectivity;
- The use of a GTM trained coding team to insure objectivity through the transcript coding process;
- Self-reflection on my own researcher positionality to demonstrate the biases of my background and past experiences, and safeguard objectivity over the course of this study.

These triangulation processes proved effective in advancing qualitative validity as they established trustworthiness of the data which encompasses the qualitative criteria of rigor (Yin, 2014).

Discussion and Modeling

The data sampling took into consideration perspectives from individuals and groups at the micro, meso, and macro organizational levels. Case study interviews previewed the organization at a strategic level providing an understanding of leadership perspectives in the Loma School District. Grounded theory interviews unveiled how employees throughout the school district perceived their work environments with respect to relationships, communication, and involvement and the nature of their work in everyday organizational life. In-person field observations afforded me the opportunity to witness interactions and actions representative of practices and behaviors that derived within a setting influenced by the human connection thrust, intentional change, and evolving change. Together, the findings established that,

- the dynamics of how inclusive leadership shaped the organizational space,

- prominent themes of human connection and intentional change were evidenced by the GTM dimensions of inclusion and their supporting processes against the backdrop of an evolving context,
- inclusive practices and behaviors with derivative attitudes developed as a result of these GTM dimensions and processes,
- the presence of inclusion was sustained and regenerated in an evolving context evidencing an interconnected relationship with climate and culture within this inclusive system.

The following subsections detail the relevance of inclusive leadership to the GTM dimensions of inclusion that unfolded through the enactment of inclusive practices and behaviors. These influenced the overlays of climate and culture and their relationship to the evolving context that emerged in this inclusive organization. Visuals are included to illustrate the complexities in this study's findings on inclusion.

GTM dimensions and processes of inclusion. In the case of the Loma School District, inclusive leadership fostered a supportive space that encouraged the intermingling of seven GTM dimensions of inclusion which were enacted through processes made up of inclusive practices and behaviors. These resulted in derivative attitudes and positive climates fostered by the human connection thrust, intentional change, and the evolving context setting. These GTM dimensions are important as they cultivated relational and improvement focused practices and behaviors amongst individuals and groups. The intermingling of the GTM dimensions of inclusion influenced the processes that engaged inclusive practices and behaviors to propel the school district collective forward with Crossing Boundaries to Accelerate Progress which drove

the organization's evolving context. These GTM dimensions and processes were fluid and ever-present in how they advanced the cycle of inclusive leadership's evolving context. These flowing forces enhanced the enactment of inclusive practices and behaviors in the school district. In turn, positive climates and derivative attitudes (people first stance, global perspective, and organic change) emerged which stimulated shifts in culture.

Figure 6.2 diagrams the flowing GTM dimensions of inclusion relevant to the Loma School District's inclusive setting. The complexity of inclusion is illustrated by showing no systematic rhythm in this inclusive system. Rather, these GTM dimensions of inclusion intermingled within a cultural space that was shaped by inclusive leadership. This cultural space is illustrated in Figure 6.2 as a mesh support netting which served as the backdrop to the organization's evolving context.

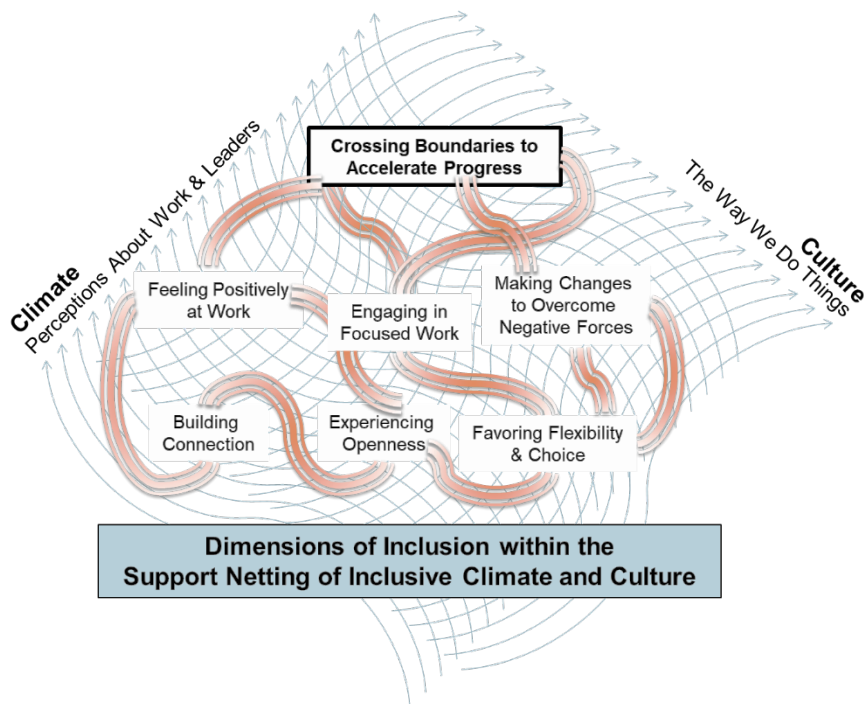


Figure 6.2. Intermingling dimensions of inclusion.

The activation of this support netting allowed for processes to emerge and propagate within the container of this inclusive organization instigating inclusive practices, behaviors, and derivative attitudes. These drove shifts in the organization's climates and culture. Aspects of climates and culture overlapped within the support netting of inclusion against the backdrop of the organization's evolving context. This figure shows how each of the primary dimensions flowed towards the prominent core dimension of Crossing Boundaries to Accelerate Progress representing its significance to the organization's evolving context. This core dimension was driven by the primary dimensions, all of which supported a focus on human connection, intentional change, and evolving context that influenced this inclusive system. These GTM dimensions were fluid and connected as they built upon each other and thrived within a whole system that denoted inclusiveness. It is important to point out that this system of inclusiveness hinged on how inclusive leadership encouraged the intermingling of these GTM dimensions of inclusion in a constructive way through vision, strategy, structure, protocols, processes, and policies that were positioned with a whole system perspective (Booyesen, 2014). The intermingling of these GTM dimensions of inclusion was further intensified by how individuals and groups brought these to life through specific processes.

Figure 6.3 illustrates the processes that developed within these intermingling GTM dimensions of inclusion. It builds on Figure 6.2's intermingling dimensions of inclusion as it highlights the processes that characterized each GTM dimension.

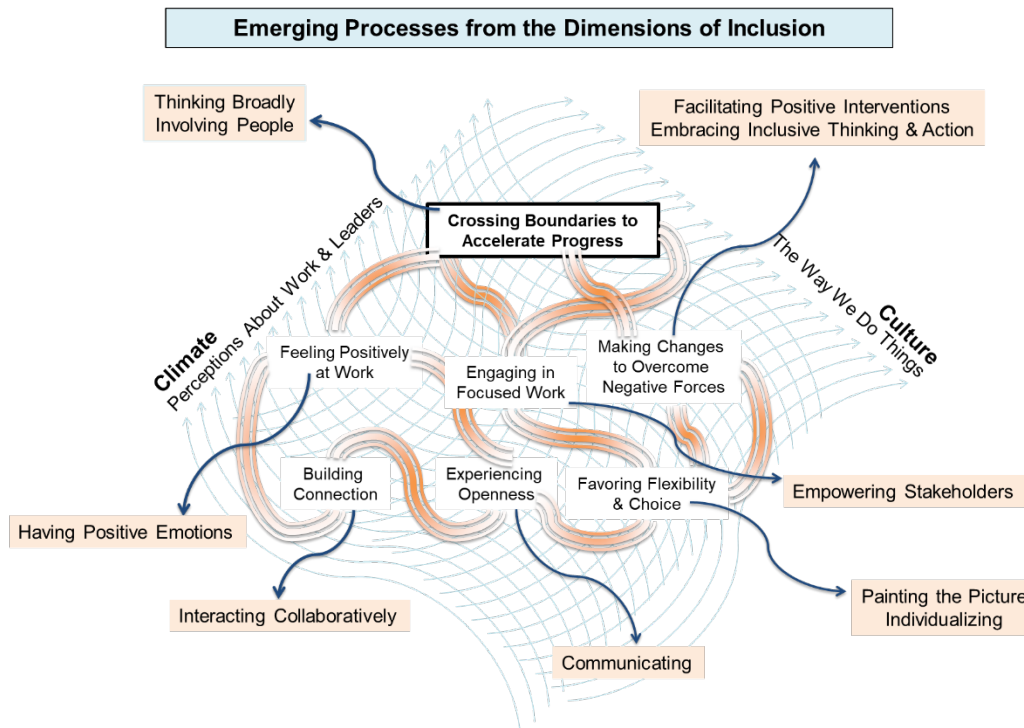


Figure 6.3. Emerging processes from the dimensions of inclusion.

These processes emerged from the dimensional analysis that was detailed in Chapter V. The processes served a critical purpose in this research by uncovering the layers of interaction and action occurring within the GTM dimensions. The processes within the Loma School District revealed what was happening at the heart of this inclusive organization. The next subsection brings these components together with the modeling of this study's findings.

Modeling. Taking into consideration the intermingling of the dimensions of inclusion and their processes, it is important to capture the essence of how these dynamics were interconnected within this inclusive organization. Figure 6.4 models how the case study and grounded theory findings established specific characteristics of inclusion's fluid existence within the Loma School District.

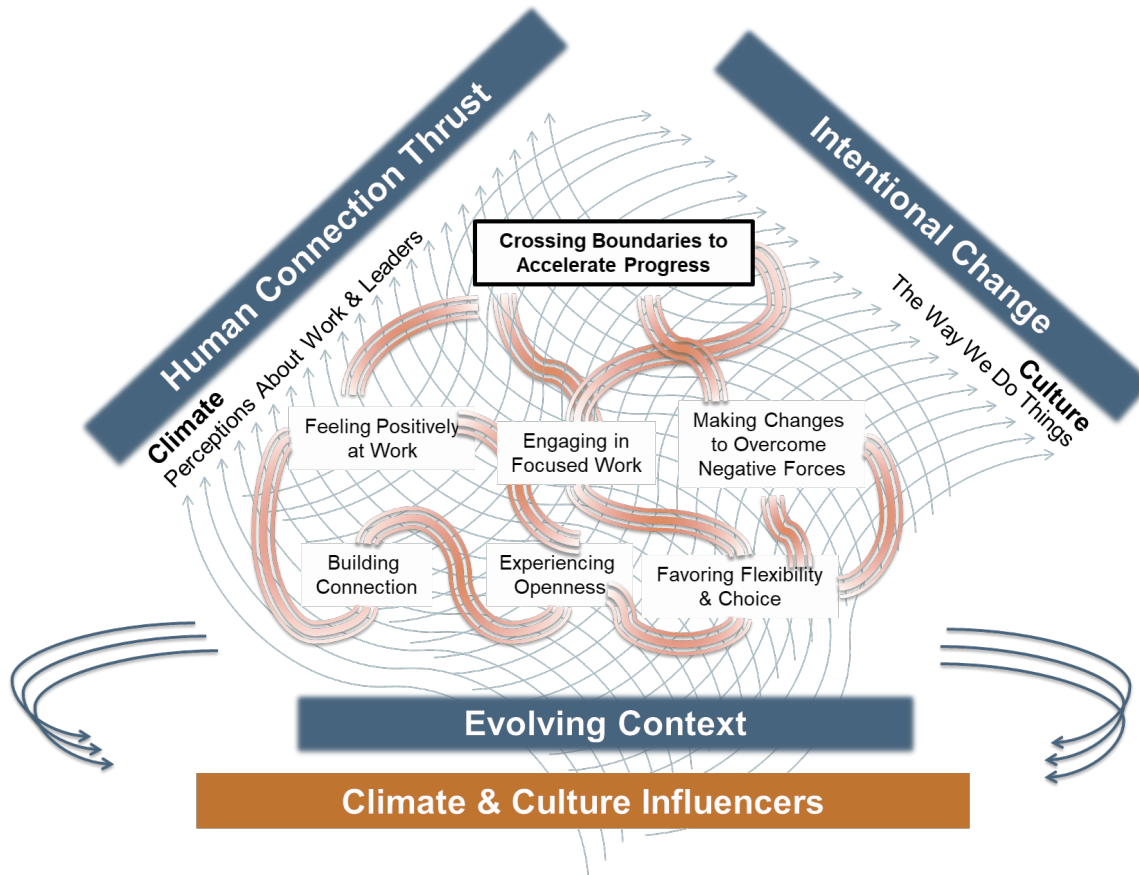


Figure 6.4. Model of Inclusive Leadership's evolving context

While earlier figures detailed the overlapping of case study and grounded theory findings (Figure 6.1), the intermingling of the GTM dimensions of inclusion (Figure 6.2), and the GTM processes that emerged within the dimensions (Figure 6.3), this model engages a broader, integrative view on the school district's inclusive system. It summarizes the interrelated aspects of this study's findings showing:

- A mesh of support netting transpired with inclusive leadership. This illustrated how climate and culture were the holding space for inclusion.
- The intermingling of seven GTM dimensions evidenced a human connection thrust, intentional change, and evolving context which reinforced inclusion.

The processes that emerged within each GTM dimension captured what was happening in this inclusive system.

- Climate and culture were interwoven aspects to organizational life in the ways that individuals and groups perceived, experienced, and valued aspects of work activity and people interaction.
- Climates supported the human connection thrust, intentional change, and evolving context at different levels within the organization. Positive perceptions leading to positive climates that contributed energy to the processes within the dimensions of inclusion.
- These dynamics stimulated derivative attitudes reflecting a “people first” stance, global perspectives, and organic change which impacted perceptions of the workplace through experiences and relationships; this affected how individuals and groups did things and what they valued with the resultant positive climates eventually compelling shifts within the culture of this organization as evidenced with its evolving context.

This model depicts characteristics that represent the framework of an inclusive organization as it reflects the interplaying components that influence the human connection thrust, intentional change, and evolving context in conjunction with inclusive leadership’s support netting that bridges aspects of climate and culture.

This model and the earlier visuals illustrate the complexities associated with this study’s empirical findings on inclusion. Of importance were the interconnectedness of the intermingling dimensions and their emerging processes. This discussion and modeling section has examined how GTM’s dimensions and processes reflected in the

lived experiences of participants to gain an understanding of what was happening within this inclusive organization. These were essential components to the grounded theory research and the dimensional analysis process. At this juncture, the discourse shifts away from the GTM specific terminology of dimensions and processes to more granular commentary on practices and behaviors. Commentary is shared on the enactment of inclusive practices, behaviors, and derivate attitudes and how these fit into the Loma School District's contextual setting driven by its climates and culture.

Inclusive Leadership's Evolving Context

The next section frames the case study and grounded theory findings in a discussion on Inclusive Leadership's evolving context to address the enactment of inclusive practices and behaviors along with derivate attitudes that mobilized the linkage between climate and culture in this organization's cycle of inclusion.

Inclusive practices, behaviors, and attitudes. The findings established that a human connection thrust, intentional change, and evolving context distinguished the Loma School District's cycle of inclusion. Earlier figures (6.1, 6.2, 6.3) illustrated the themes that emerged from the case contextual analysis and grounded theory dimensions and processes that revealed the lived experiences of individuals and groups within this inclusive organization. The bridging of the findings prompted the question of how practices, behaviors, and attitudes fit into this inclusive system. Quite simply, the processes within the GTM dimensions mirrored the inclusive practices and behaviors; the impacts within the GTM dimensions mirrored key attitudes that were derived from the cycle of inclusion. The enactment of inclusive practices and behaviors emerged within the cultural space that was created by inclusive leadership. That cultural space is

represented by the support netting of inclusion. More precisely, inclusive leadership mobilized the enactment of inclusive practices and behaviors that brought to life the cycle of inclusion.

To summarize, the inclusive behaviors and practices involved the processes of *Interacting collaboratively, Communicating, Empowering stakeholders, Painting the picture, Individualizing, Inclusive thinking and action, Facilitating positive interventions, Thinking broadly, and Involving people*. The enactment of these practices and behaviors were a by-product of how inclusive leadership influenced a cultural space of support that impacted day to day organizational life. These influences prompted inclusive attitudes that placed value on a people first stance, global perspectives, and organic change. These attitudes were derived from the enactment of inclusive behaviors and practices. The derivative attitudes combined with the enactment of inclusive behaviors and practices built upon each other in a developing and regenerating manner that supported the cycle of inclusion and its emphasis on the human connection thrust, intentional change, and evolving context. True to inclusion's fluid composition, the overall impact of these forces flowed throughout the organization affecting participant perceptions (climate) and how things were done (culture).

Climates and cultures of inclusion. An earlier subsection described how inclusive leadership's evolving context was mobilized by the enactment of inclusive practices and behaviors resulting in derivative attitudes. Together, these influenced aspects of the organization's climate and culture. In the case of the Loma School District, climates and culture were interwoven into how they contributed to the shifting patterns of inclusion in support of the human connection thrust, intentional change, and

evolving context. Inclusive practices and behaviors (and derivative attitudes) impacted participant perceptions (climate), and eventually influenced shifts in the more slow-changing aspects of how things were done (culture). While the interplay between climate and culture was not systematic and orderly, the clustering of positive climates within the cycle of inclusion was relevant to the dynamics that drove human connection, intentional change, and evolving context. From assessment of the findings, it was evident the clustering of positive climates served as a generative force as exemplified with the grounded theory dimension of *Having positive emotions*.⁵ This drove positive employee perceptions (climate) helping to foster more relational activity and improvement efforts stimulating the evolving context. The relationship between climate and culture is based upon inclusive leadership creating a space of support and organizational members enacting inclusive practices and behaviors which impacted people's perceptions (climate). When perceptions were positive, over time they impacted how things were done (culture) in the organization. This offered flavor to how climate and culture were interwoven within the support netting of this inclusive organization. The overlap that occurred between climate and culture was productive as it became richer in its emphasis on human connection, intentional change, and evolving context as the organization endeavored to cross boundaries to accelerate progress.

The full scope of findings pertaining to the case study's key themes and GTM's dimensions and processes of inclusion were illustrated in this chapter's visuals and model offering an assessment of inclusive leadership's evolving context. These aspects to the study's findings directly support the emergence of four theoretical propositions:

⁵ The climates were inclusive; however, they are referred to as positive since they derived from positive emotions.

- Inclusive leadership creates a cultural space.
- Inclusion is enacted through positive practices and behaviors.
- Dynamics of positive climate clustering enrich human connection and intentional change within inclusive organizations.
- Inclusive organizational cultures foster evolving contexts that are sustained by people first attitudes, global perspectives, and organic change.

The next section overviews how these theoretical propositions are grounded in extant literature.

Grounding Emergent Theory in Extant Literature

The research conducted in the Loma School District provided empirical evidence that uncovered how inclusion had the capability to be a positive and generative force within a single organizational setting (Cameron, 2013; Caza & Carroll, 2012; Ferdman, 2014; Gallegos, 2014; Roberson, 2006; Shore et al., 2011; Simola, 2016). This section extends the theoretical discussion on inclusive leadership, inclusive practices and behaviors, and climates and cultures of inclusion with four theoretical propositions. Each of these harmonizes with various aspects of scholarship that span across different domains of leadership and change. This study's findings affirmed existing research as well as brought forth new contributions to scholarship. This discussion presents the theoretical propositions, frames them within extant literature, and highlights ways this study has expanded on current knowledge in the areas of inclusion as well as climate and culture.

Theoretical proposition one: Inclusive leadership creates a cultural space.

The idea that inclusive leadership created a cultural space emerged from the case study

themes and GTM research. The findings evidenced how inclusive leadership fostered conditions to encourage human connection and intentional change against the backdrop of an evolving context of inclusion (Cameron, 2013; Caza & Carroll, 2012; Frederickson, 2009; Nkomo, 2010; Simola, 2016). These aspects to inclusive leadership aligned with how inclusion scholars have posited inclusion perpetuates cycles of virtuousness supported by relational, communicative, and participative practices and behaviors (Booyesen, 2014; Cameron, 2013; Cameron & Spreitzer, 2012; Ferdman, 2014).

The literature also depicted inclusive leadership in a positive light due to how it encourages relationships and involvement with emphasis on ensuring value to uniqueness and belonging amidst differences, which was confirmed in the Loma School District case (Ferdman, 2014; Gallegos, 2014; Mor Barak, 2008; Nkomo, 2010; Shore et al., 2011). While inclusion literature is still in its youth, many other bodies of scholarship support its relevance to leadership and change including POS, high quality communication and relationships, and employee voice and participation (Cameron, 2013; Caza & Carroll, 2012; Gorden et al., 1988; Jordan, 1990; Kahn, 1990; Milliken & Morrison, 2003; Nishi & Rich, 2014; Roberts et al., 2016). In this study, inclusive leadership's emphasis on the human connection thrust (relationships, communication, involvement) aligned with relational leadership theory (Uhl-Bien, 2006); and the intentional change theme (internal/external forces, focus, and improvement) correlated to adaptive leadership theory.

Relational leadership theory. This study found inclusive leadership to have a pronounced focus on human connection. The data detailed how this played out with the focus on relationships, communication, and involvement that was present across the

micro, meso, and macro levels of the organization due to how inclusive leadership shaped a supportive space for organizational members. This ties to Dutton and Heaphy's (2003) work on high quality connections (HQC) and how these depend on people to interact to accomplish their work. The human connection thrust brought forth the significance of social interaction to inclusion which correlated with how Uhl-Bien (2006) distinguished relational leadership theory as socially constructed rather than entity-based. The reference to entity-based leadership is a perspective denoting leadership resides in individuals or groups (typically with titles) that influence relationships to accomplish organizational goals.

Relational leadership theory contrasts with this, offering the perspective that leadership is socially constructed versus attributed to individual entities. "The key difference between relational and entity perspectives identify the basic unit of analysis in leadership research as relationships not individuals" (Uhl-Bien, 2006, p. 662). The study's findings showed that inclusive leadership emphasized a human connection thrust which aligned with relational leadership theory. Its focus on social interactions and a collective stance were relational and communicative in nature (Browning et al., 2012; Gallegos, 2014; Nkomo, 2010; Ruderman et al., 2010; Uhl-Bien, 2006). This pointed to the relevance of positive organizing and relating across differences as well as RCT's emphasis on high-quality interactions, connections, and relationships (Jordan, 1990; Ragins & Kram, 2007; Roberts et al., 2016; Simola, 2016).

Scholars have built on relational research emphasizing how relationships and change are interrelated as denoted with a range of frameworks (Booyesen, 2014; Boyatzis, 2006; Heifetz, Grashow, & Linsky, 2009; Uhl-Bien & Marion, 2009). One

example is the framework on global mindsets which has illuminated the importance of engaging social skills for relationship-building and dealing with complex change (Booyesen, 2016). Other scholars have emphasized how intentional change and complexity evolve at different levels within an organization which brings forth the relevance of adaptive leadership theory to the Loma School District's case (Boyatzis, 2006; Heifetz et al., 2009; Uhl-Bien, 2006).

Intentional change coupled with the human connection thrust were found to be essential components to a cycle of inclusion in the Loma School District. There was an organic approach to change that hinged on an awareness of internal and external forces, and stakeholder focus on the needs surrounding improvement. The cultural space that was shaped by inclusive leadership fostered conditions that supported social interaction and collective work efforts that evidenced involvement and empowerment across levels that mobilized intentional change. These elements of organizational change that were revealed in the Loma School District correlated to adaptive leadership theory.

Adaptive leadership theory. Findings in the Loma School District study demonstrated the organization's intentional focus on organic change facilitated the overcoming of boundaries to accelerate progress. More specifically, data evidenced how an inclusive organization encouraged stakeholder involvement in focused improvement efforts amidst challenging internal and external forces; thinking broadly with an awareness of the challenges the organization faced; and employing ground up approaches and organic change efforts to facilitate positive interventions. These factors were influenced by the cultural space that was created by inclusive leadership, and

reflected certain aspects of how adaptive leadership encourages change efforts. Adaptive leadership (Heifetz et al., 2009) has been conceptualized as the “practice of mobilizing people to tackle tough challenges and thrive” (p. 2) in different ways in turbulent environments. This leadership theory is notable as it distinguished the importance of creating a holding space that empowers organizational members to engage in problem-solving, decision-making, and risk-taking to advance change. Inclusive leadership in the Loma School District paralleled to this as its leadership created a cultural space within which employees were empowered to become involved and lead improvement initiatives. This in turn allowed for intentional change as organizational members facilitated positive intervention efforts to make changes to overcome negative forces.

Adaptive leadership theory (Heifetz et al., 2009) raised how leadership contextual circumstances can shape how organizations and their members address difficult conditions, and this was mirrored in the Loma School District experience. The support conditions of inclusion that emerged from the cultural space created by inclusive leadership paralleled to adaptive leadership and its creation of a holding space. Both inclusive and adaptive leadership recognize how contexts can be shaped to empower people to handle complex and ambiguous circumstances through involvement in change efforts (Booyesen, 2014; Boyatzis, 2006; Heifetz et al., 2009). In the case of the Loma School District, this played out as people were brought together to meet the challenges presented by the community’s heart-breaking realities. The district’s engagement of internal and external stakeholders in intentional change efforts was in response to overcoming those negative forces.

Change theory also has significance to the Loma School District's emphasis on intentional change because of the complexities associated with how individuals and groups handle change (Boyatzis, 2006). Boyatzis (2006) posited "smooth, continuous change does not fit with reality" (p. 607), which is relevant to the importance of empowering and mobilizing stakeholders at all levels to effect change as there is strength in collaboration. Scholarship on collaboration has evidenced how nurturing environments can serve as an impetus motivating stakeholder engagement in new ideas (de Poel et al., 2012; Jaskyte, 2010; Lance, 2010; Ozcelik et al., 2008). This was exemplified with how collaborative interaction in the Loma School District was a conduit to Crossing Boundaries to Accelerate Progress as depicted with its intentional change focus. Further, the empowerment and involvement of stakeholders to facilitate change suggested the importance of systems thinking and a whole systems approach in this case (McCauley, 2014; Senge, 1990). To this point, the natural engagement of systems thinking (Senge, 1990) occurred in the Loma School District as organizational members learned and developed an awareness for how internal and external forces impacted their organization and community at a macro (strategic) level. Wooten (2006) described how a systems approach stimulates difference in perspective and ideas which allows for a productive focus (p. 164). These aspects to a whole system lens linked to the work stakeholders were engaged in at the micro and meso levels. Ultimately, stakeholder involvement propelled a focus on interactions and change processes that drove the relational and change components in this inclusive organization.

Theoretical proposition two: Inclusiveness is enacted through positive practices and behaviors. The study in the Loma School District offered perspective on

how organizational members enacted positive practices and behaviors. The findings showed that inclusive leadership established conditions that promoted open attitudes, ground up approaches, and autonomy. Participants were emphatic in how they placed value on these aspects of organizational life. This emerged in the findings as openness, flexibility, and choice were imperative to enacting positive practices and behaviors as they insured empowerment and motivated engagement in individuals and groups across levels of the organization.

One of the primary findings in both sets of findings was how people went about their day to day work with a common understanding of the value of involvement. The findings confirmed involvement was essential to both human connection and intentional change which aligned with other studies in this area (Fernandez & Moldogaziev, 2015; Schor, 1994). The data in this case evidenced how participants valued being a part of work processes, having access to information, and engaging in decision-making. The processes supporting inclusion in this case—*Painting the picture, Individualizing, Communicating, Interacting collaboratively, Inclusive thinking and action, and Empowering stakeholders*—substantiated other research that has set forth the value of involvement (Henderson, 2014; Mor Barak, 2008; Roberson, 2006; Shore et al., 2011). Shore et al. (2011) postulated that involvement allows stakeholders to experience insider status through information sharing, safe voice channels, and participation in decision-making. In this respect, involvement encompassed communication, which was reflected in the school district's processes. In the case of this inclusive setting, being involved and having voice also meant the preservation of individual uniqueness along with a sense of belonging (Ferdman, 2014; Nishi & Rich, 2014). Participants in the

Loma School District were explicit in their descriptions of how this took place in their work environment thereby substantiating standing research on the importance of involvement.

Involvement in the Loma School District was prevalent at the micro, meso, and macro levels of the organization depicting how positive practices and behaviors were enacted as these originated at the individual and group levels across the school district. The importance of involvement in organizational settings has been linked to various aspects of Positive Organizational Behavior (POB) literature including positive leadership theory and Psychological Capital (PsyCap). While these are comprehensive constructs encompassing behaviors that extend well beyond involvement, the findings in the Loma School District case specifically substantiated the relevance of involvement which is one of the key components to POB. This subsection speaks directly to the importance of involvement to the enactment of positive practices and behaviors associated with inclusion.

Positive leadership theory. Cameron (2013) ascertained that positive leadership can create dynamics of interpersonal flourishing, virtuous behavior, positive emotions, and emerging networks. This theory placed high value on positive relationships asserting that people can serve as “energizers” to “create and support vitality in others” (p. 53), which was a key theme that emerged within the dimension of *Feeling Positively at Work* serving to advance involvement levels. Loma School District participants attributed positive feelings of optimism and passion to relationships and positive leader influences as these insured relational and supportive practices and a space for involvement to occur. Additionally, participants expressed a high regard for

having the opportunity to lean into their strengths and uniqueness when involved in different facets of organizational life (Brewer, 1991; Fletcher & Ragins, 2007; Shore et al., 2011). At a broad level, these aspects to positive leadership theory support how relationships and positive leader influences energized involvement at different levels throughout the Loma School District (Cameron, 2013; Heaphy & Dutton, 2008). To illuminate how involvement drove the enactment of positive practices and behaviors of inclusion at micro levels in the organization, it is helpful to examine one of PsyCap's four components.

PsyCap. Described as “a higher order positive construct comprised of the four-facet constructs of self-efficacy/confidence, optimism, hope, and resiliency,” PsyCap is known for focusing on strengths and positive capacities to develop organizational members towards “optimal functioning, flourishing, and reaching human potential” (Luthans, Youssef, & Avolio, 2007, p. vii). Involvement falls directly within PsyCap's hope component offering perspective on how individuals in the Loma School District were involved in driving the areas of human connection thrust and intentional change in the Loma School District. This is demonstrated with how these scholars ascertained that hope results with “emphasis on bottom-up decision-making and communication, opportunities for participation, employee empowerment, engagement, delegation, and increased autonomy that have documented workplace outcomes” (Luthans et al., 2007, p. 69).

These aspects of PsyCap were substantiated by the Loma School District's experiences with involvement. Specifically, the findings showed how intentional improvement efforts, organizational change, and progress were connected to the

empowerment and involvement of individuals and groups with their enactment of positive practices and behaviors. Therefore, the conditions of involvement in the Loma School District mirrored this PsyCap component as hope, derived from involvement, and was evidenced in the data that showed participants' positive feelings about work.

One of PsyCap's features is its emphasis on the development of individual capacities. This study extended the potential of PsyCap by offering evidence of how these dynamics have the capability to extend beyond an individual focus on capacity development with hope and involvement. This emerged with how involvement was embedded throughout the micro, meso, and macro organizational levels with the school district's cycling of inclusion, so capacity development would be beneficial if extended to all levels within an organization. The importance of expanding on this is that positive emotions that derive from relationships and involvement influence the generation of positive climates which are a productive force within organizations (Koene et al., 2002; Watkin & Hubbard, 2003).

Based on the above, this study built on positive leadership theory and PsyCap as it demonstrated how human connection flourished within inclusive environments, and illustrated that the ability to be involved led to the enactment of positive practices and behaviors. The data evidenced that relationships and involvement were guiding forces to the enactment of positive practices and behaviors, which fueled positive climates within the school district. Participant narratives supported this with detailed descriptions on having positive feelings and perceptions about relationships and involvement which tied into being empowered, using strengths, and being themselves (Henderson, 2014;

Koene et al., 2002; Mor Barak, 2008; Roberson, 2001). This signified how positive climates thrived within the Loma School District.

Theoretical proposition three: Dynamics of positive climate clustering enrich human connection thrust, intentional change, and the evolving context within inclusive organizations. Research on climate covers the broad spectrum of positive and negative perceptions that emerge in work environments (Ehrhart et al., 2014; Glisson & James, 2002; Nkomo, 2010). Findings in this study evidenced clusters of positive climates which resulted from the supportive, nurturing environments generated within an inclusive organization. The Loma School District's clustering of positive climates and their relationship to the cycle of inclusion around a human connection thrust, intentional change, and the evolving context corroborated research on climate strength (Ehrhart et al., 2014).

Climate strength. Ehrhart et al. (2014) asserted climate strength evolves from a range of conditions including "(a) the presence of cohesive work units and high within-unit social interaction (b) having dense social networks (c) unit members engaging in higher levels of sense-making (d) interdependency with work units (e) being provided with high levels of information" (p. 100). Each of these attributes were exhibited in the Loma School District study thereby depicting how inclusive systems reflect climate strength. Table 6.1 overviews how positive practices, behaviors, and attitudes associated with inclusive leadership exemplified the attributes of climate strength as identified by Ehrhart et al. (2014). Specifically, the positive practices, behaviors, and attributes led to cohesive work units, dense social networks,

sense-making, and information sharing. These were evidenced with the Loma School District's climate strength examples shown in the right column of Table 6.1.

Table 6.1

Drivers of Positive Perceptions and Climate Strength in the Loma School District

Positive Practices, Behaviors, and Attitudes	Climate Strength Indicators	Loma School District Climate Strength Examples
<p>Practices and Behaviors</p> <ul style="list-style-type: none"> • Thinking Broadly • Involving People • Facilitating Positive Interventions • Embracing Inclusive Thinking and Action • Communicating • Interacting Collaboratively • Painting the Picture • Individualizing • Empowering Stakeholders • Having Positive Emotions <p>Inclusive Attitudes</p> <ul style="list-style-type: none"> • People first • Global perspective • Organic change focus 	<ul style="list-style-type: none"> • Cohesive Work Units • Dense Social Networks • Engagement in Sense-Making • High Levels of Information Sharing 	<p>Positive Influences</p> <ul style="list-style-type: none"> • Supportive, nurturing leader and peer influences led to strengthened connections and increasingly frequent and open communication patterns within groups as well as across school locations, the district, and community <p>Expanding Circles of Work</p> <ul style="list-style-type: none"> • Stakeholder involvement across levels, roles, and areas insured collaboration, connection, belonging • Quality relationships extended vertically and horizontally • Wearing many hats engaged colleagues across functional areas <p>Empowerment and Choice</p> <ul style="list-style-type: none"> • Engagement in leading change led to problem-solving, decision-making, and ownership • Awareness and alignment of work activities <p>Information Exchange & Sharing</p> <ul style="list-style-type: none"> • Meetings were forums for discussion • Frequent, open informal and formal communication patterns • Attention to identification of disconnect rather than difference • Acceptance and acknowledgement of disagreement in the workplace • High levels of understanding of negative forces influencing a whole system perspective

Positive leader and peer influences established cohesion in business units and the expansion of work circles across functions and levels encouraged denser social networks. The inclusive system's human connection thrust encouraged cohesive business units and denser social networks. Its intentional change emphasis empowered stakeholders with openness, flexibility, and choice which resulted in sense-making and information sharing both formally and informally. These aspects to the Loma School District's clustering of positive climates substantiated climate strength research. Further, these examples expanded on it offering specifics for practical application as well as offering opportunity for research to further explore how inclusive climates can sustain and regenerate climate strength.

This study evidenced how the positive climate clustering was generative, often spreading in a way that supported the existence and growth of a human connection thrust, intentional change, and evolving context in a constructive and reinforcing manner (Cameron, 2013; Wooten et al., 2016). This aspect of the Loma School District case revealed how positive climates can enrich an organization's trajectory as reflected in the organization's focus on Crossing Boundaries to Accelerate Progress. This occurred because positive climate clustering built the energy and motivation to drive engagement in change in an inclusive manner (Caza & Carroll, 2012; Simola, 2016; Syed, 2014; Watkin & Hubbard, 2003). The human connection thrust component holds tremendous significance to organizational climate and cannot be emphasized enough.

Golden-Biddle, GermAnn, Reay, and Procyshen (2007) posited relationships define "intimate bonds in which groups of people develop a sense of mutuality, positive regard, and respect for one another. People in these relationships feel enriched and perhaps

even energized by them” (p. 291). High quality interactions, connections, and relationships across various areas of scholarship offer empirical evidence to support the value of relational practice (Ragis & Kram, 2007; Roberts et al., 2016; Syed, 2014). The human connection thrust that emerged in this study furthers the relevance and importance of relational practice in organizations as it generates positive climates.

Theoretical proposition four: Inclusive organizational cultures foster evolving contexts that are sustained by people first attitudes, global perspectives, and organic change. Inclusive organizational cultures are unique as their fluid state counters what are typically slow changing aspects of culture that represent the way things are done (Frontiera, 2010; Gallegos, 2004; Glisson & James, 2002; Schein, 2010). This was evidenced in the Loma School District as the dimensions of inclusion and their processes brought to light how organizational members at all levels enacted inclusive practices and behaviors that centered on human connection thrust, intentional change, and an evolving context. In the case of the Loma School District, its flexuous landscape of inclusive leadership instigated a cultural space which fostered empowerment and involvement for the enactment of inclusive practices and behaviors. Further, it influenced the clustering of positive climates around human connection and intentional change. These flowing human dynamics and progressive change behaviors cultivated collaboration, strength, and agility which were evidenced in derivative attitudes reflecting people first stances, global perspectives, and organic change (Jaskyte, 2010; Ozcelik et al., 2008). This allowed the school district to cross boundaries and accelerate progress which echoed aspects to literature on boundary spanning mindsets (Chrobot-Mason et al., 2016).

Boundary spanning mindsets. Returning to the boundary spanning literature is important as the findings in the Loma School District study substantiated the value this brings to leadership and change in today's turbulent times. The relevance of boundary spanning is evidenced in its focus on comfort with ambiguity and agility with bringing different groups together. Chrobot-Mason et al. (2016) characterized boundary spanning mindsets as having the capacity to mobilize interaction between groups to solve complex problems, and the ability to motivate intergroup interactions. Boundary spanning mindsets are relevant in today's interdependent, global society as they facilitate collaboration and solutions with an emphasis on inclusion. Specifically, the boundary spanner will create "an identity that values 'we' as well as 'me within we'" (p. 108). This aligns with the collective stance and co-constructed nature that typifies inclusive leadership and systems of inclusion (Booyesen, 2014; Ferdman, 2014; Gallegos, 2014; Wasserman, Gallegos, & Ferdman, 2008). Aspects of boundary spanning were confirmed in this study by how participants described the relationship and involvement practices relevant to *Communication*, and *Inclusive thinking and action* as well as the process of *Collaborative interaction*. This encompassed listening, discussing, exchanging, sharing, supporting, advocating, and conveying value. These activities reflected the presence of inclusion engaging reciprocity, mutuality, and respect for uniqueness while encouraging belonging (Brewer, 1991; Ferdman, 2010; Fletcher & Ragins, 2007; Gallegos, 2014; Jordan, 1990; Shore et al., 2011). These aspects to an inclusive system were supportive to the key premises in boundary spanning as inclusive leadership fostered the cultural space for the enactment of inclusive practices and behaviors.

Scholars have delineated culture in varying ways including what constitutes the structure of an organization, how socialization occurs, what shapes group behaviors, the nature of interdependent variables such as values and behaviors, and what constitutes shared meaning for organizational members (Cameron & Quinn, 2011; Denison, 1996; Ehrhart et al., 2014; Jaskyte, 2010; Kotter & Heskett, 1992; Schein, 2010). The research in the Loma School District built on these attributes of culture through the lens of an inclusive system (Booyesen, 2014; Ferdman, 2014; Gallegos, 2014; Wasserman et al., 2008). The fluid nature of a culture of inclusion captured how the structure, socialization, interdependent variables (invisible and visible), group behaviors, and shared meaning within an organization were all aspects that illuminated what was happening within this inclusive system. This study's findings furthered our knowledge of climate with evidence on how positive, inclusive climates are linked to cultures of inclusion that are shifting nature due to inclusive leadership's evolving context.

These theoretical propositions advance aspects of inclusion based on the experiences of individuals that have worked within an inclusive organization. This multiple method study involved integrating the GTM social process dimensions from voices at the ground level of the school district with the case study's over-arching themes from leadership perspectives at a more strategic level. Both areas depicted human connection and intentional change as essential components to this inclusive system's way of organizational life. As the four theoretical propositions highlighted, these angles of inclusiveness bridged how leadership, practices and behavior, and climate and culture were driving components to the organization's evolving context.

These reflected in how people first attitudes, global perspectives, and organic change depicted the penetration of inclusion in the school district.

Implications for Leadership Practice

The introduction of four theoretical propositions pertaining to inclusive leadership serve as a compass guiding how this research contributed to both scholarship and practice in the areas of leadership and change. As indicated earlier, this study's findings not only have implications for future research across different domains of scholarship, but also hold relevance for practical application at the micro (individual), meso (group), and macro (organizational) levels of organizations. Table 6.2 presents an overview of practical application strategies at different organizational levels. These practitioner strategies are seemingly straightforward which could be construed as a contradiction to inclusion's complexities. However, the complexities associated with inclusion are also its strengths. Qualities of inclusion remain elusive as they do not play out in a structured and predictable manner. And yet, inclusion's malleable nature serves to benefit organizational practice as the flexibility within an inclusive system allows for meeting the needs and uniqueness of individuals and groups.

Table 6.2

Implications for Practical Application

	Needs	Practical Application	Outcomes
Micro Level	Talent Development Leadership Development	Establish talent development initiatives that extend capabilities beyond technical expertise towards skillsets that build human connection and intentional change efforts. <ul style="list-style-type: none"> • Communication and relationship building skillsets for collaboration across roles, levels, and units; and constructive handling of conflict. • Involvement opportunities across departments and divisions to foster awareness of the organization's internal and external forces. • Engagement in whole system perspectives and strategic thinking for needs assessment, decision-making, and facilitation of improvement initiatives. 	<ul style="list-style-type: none"> • Quality Relationships • Collaboration • Focused Improvement • Positive Climates (Engagement)
Meso Level	Fostering Positive Climates Productive Inter/Intra Group Work Functions and Outcomes	<p>Develop conditions for collaborative interaction in formal and informal settings in support of healthy human connection. Engage organization in a whole system perspective.</p> <ul style="list-style-type: none"> • Advancement of strengths to facilitate interventions, progress. • Ability to work through difference and disagreement constructively. <p>Develop strategic thinking skills at group levels for the benefit of the whole system.</p> <ul style="list-style-type: none"> • Enhancement of cross-functional network building opportunities to tap into the energy of the whole system. • Expansion of work circles across functions, levels, roles to create interdependencies that strengthen networks and break down silos. • Increased opportunities for involvement in organizational priorities across groups, departments, divisions. 	<ul style="list-style-type: none"> • Transparency • Organic Change • Alignment • Silo Prevention • Trust, Respect

(table continues)

Table 6.2 (continued)

		<ul style="list-style-type: none"> Utilization of differences as a resource for furthering openness and transparency through exchange rather than disconnect and conflict. 	
		<p>Advance whole system perspectives capable of facilitating improvements that align with the organization’s change needs.</p> <ul style="list-style-type: none"> Fostering of communication channels. Skills development in listening, discussing, exchanging, sharing, supporting advocating, conveying value. Implementation of productive meeting settings Auditing of policies, processes, strategies, systems that promote inclusion and participation. 	
Macro Level	<p>Inclusive Organizational Culture</p> <p>Employee Engagement</p> <p>Effecting Change</p>	<p>Engage and model techniques that build relationships, communication, and involvement across the macro, meso, and micro levels of the organization; Foster positive leader influences based on the unique and individual needs of individuals and groups in the organization.</p> <p>Advance vertical and horizontal channels for human connection and intentional change through:</p> <ul style="list-style-type: none"> Leveraging collaborative interaction and inclusive thinking and action. Pushing out opportunities for involvement in addressing negative forces and facilitating change Empowerment with choice and decision-making Coaching on skillsets for thinking broadly to cultivate awareness Inclusive Leadership Development 	<p>Inclusive Leadership</p> <p>Quality Relationships</p> <p>Intentional Change</p> <p>Progress</p> <p>Global Perspective</p>

This study elevated awareness of the interplaying components that made up inclusion efforts against the evolving context in the Loma School District. The case study themes and GTM dimensions and processes validated the emergent nature of

inclusion. It uncovered the importance of leadership's work with creating a cultural space, and how organizational members enact positive practices and behaviors that rest within the supportive netting of an inclusive organization's climate and culture. These fostered the clustering of positive climates to drive human connection and intentional change, and the evolving context situated shifts for a culture of inclusion. This explanation delineates the theoretical texture of inclusion with its malleable and emergent nature, but what does this look like when you envision it from the standpoint of practical application?

Having completed this study on inclusive leadership, inclusive practices and behaviors, and climates and cultures of inclusion, it is important to return to the early Inclusion Triad model from Chapter II. The original Inclusion Triad was developed based upon a literature review across various bodies of scholarship, and advanced the question of how inclusive leadership stimulates climates and cultures of inclusion. This question was answered with the empirical findings from this study.

Figure 6.5 illustrates how the mesh of support established through inclusive leadership envelops a system in a cycle that supports human connection, intentional change, and an evolving context. Essentially, as inclusive leadership shapes an optimal space for inclusion through relationships, communication, and involvement, organizational members become engaged in human connection and intentional change efforts. The enactment of inclusive practices and behaviors emerges at different levels within the organization.

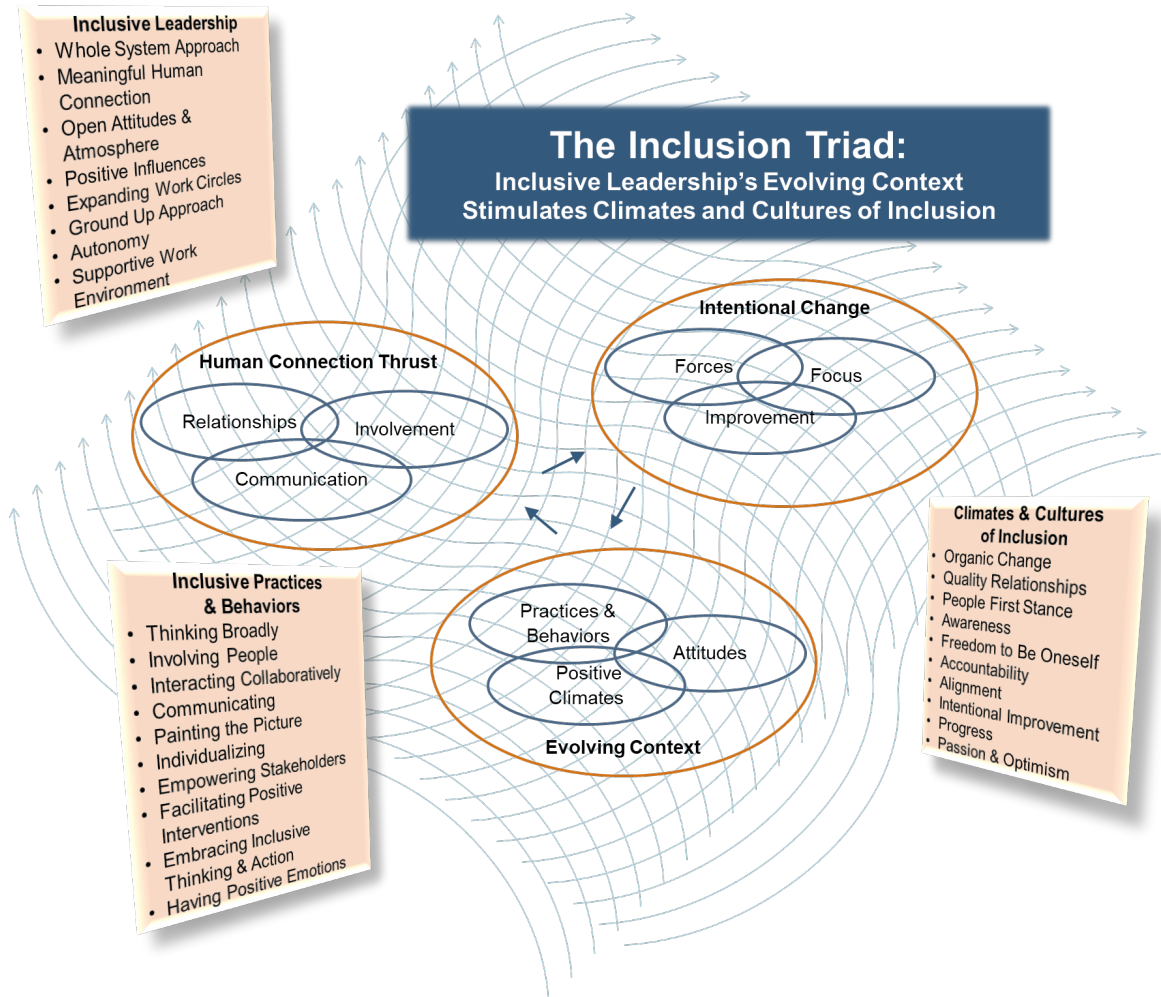


Figure 6.5. The Inclusion Triad: Inclusive leadership's evolving context stimulates climates and cultures of inclusion.

These practices and behaviors fuel the cycle of a human connection thrust and efforts towards intentional change, and this plays out with a continuous improvement focus on overcoming challenges associated with internal and external forces. The cycle influences derivative inclusive attitudes and positive climate clustering effecting inclusive leadership's evolving context. The fluid composition of the inclusive system engages eventual shifts of climate and culture. The original and current figures (Figure 2.2 and Figure 6.1) both reflect aspects of how inclusive leadership supports inclusive practices and behaviors which lead to organizational contexts made up of climates and

cultures of inclusion. However, Figure 2.2 was linear in its design so it did not accurately reflect the dynamic and fluctuating strengths associated with how inclusive leadership stimulates climates and cultures of inclusion. Figure 6.1 depicts the cycling and evolving nature of inclusion within inclusive leadership's evolving context along with its relevance to the overlays of climate and cultures of inclusion.

Limitations of the Study

This study's key limitations revolved around its strengths, which included the use of a multiple method design to capture participant perspectives at the micro, meso, and macro levels within a school district. The study was designed to delve deeply into participant experiences in the Loma School District which offered in-depth knowledge and understanding of what was happening within this inclusive organization. The thorough nature of this research meant it was limited to one organization in one sector using qualitative methods. This research design precluded insights from a more expansive participant sampling as described below.

- **Single organization focus:** The samplings from this study came from a single K-12 school district which did not allow for comparisons of inclusive leadership in other educational institutions with characteristics depicting inclusive leadership.
- **Sector specific study:** The study took place within the education sector which did not allow for an understanding of aspects of inclusive leadership in other industries that make up the landscape of our interdependent, global society. Examining inclusive leadership within for-profit, non-profit and/or government settings could broaden findings on inclusion research.

- Singular inquiry approach: The use of qualitative methods allowed for an in-depth understanding of the phenomenon of study from a select group of participants. This singular approach to inquiry prevented sampling from more diverse and expansive populations. While this study was not designed to establish generalizability, the use of quantitative methods could have broadened the research findings.

This was an exploratory study designed to examine the nascent area of inclusive leadership. It unveiled important empirical findings that were triangulated from multiple angles to establish authenticity and accuracy with the research. Naturally, a qualitative lens limits the scope of sampling due to its emphasis on in-depth participant perspectives.

Recommendations for Future Research

Scholarship specific to the behaviors and processes that are relevant to inclusive leadership encompasses research across a range of constructs including diversity and inclusion, Positive organizational scholarship, and organizational culture and climate. While these bodies of work are rich in theoretical discussion and findings, little existing empirical research deciphers and authenticates the social processes associated with inclusive leadership, and the linkage between the culture and climate constructs. Inclusion scholarship is still in its youth; moreover, organizational culture and climate research is extensive yet typically examined as separate disciplines. These realities suggest robust opportunity for future research.

This exploratory study on inclusive leadership, inclusion practices, and cultures and climates of inclusion sets the stage for future empirical work that can enrich our knowledge of the inclusion construct. My recommendations for future research include:

- Multiple organization focus: Replicate this study's research design with the added component of expanding it to a multiple case study approach to examine inclusion within two different organizations. This would facilitate the comparison of inclusive leadership characteristics in more than one organizational setting to deepen the exploration, dialog, and authentication of best practices associated with inclusive leadership.
- Inquiry across sectors: Build on the findings of this study by examining inclusion-related processes outside of the public education sector. This could involve exploring aspects of inclusion in different industries that are non-profit, private and/or government related. Facilitating inquiry of this nature across sectors would expand our understanding of how inclusion translates into organizational behaviors and practices that are prevalent in different work arenas thereby expanding both the breadth and scope of inclusive leadership research.
- Additional qualitative studies: Conduct further exploratory research in the developing area of inclusion through other qualitative research designs. One example would be to engage in phenomenological research to understand in depth lived experiences of people within an inclusive setting. Other qualitative studies might extend to critical incident studies, biographies of inclusive

leaders and organizations, and ethnographic studies focusing on unobtrusive measures.

- Mixed method research: Design a cross-sectional study that employs a survey to further validate the specific attributes of inclusive leadership, inclusion practices, and climates and cultures of inclusion that were uncovered in this study. This could entail developing a scale to measure how well people in organizations build connection, which could serve as a tool for gauging development needs. The scale might involve specifics derived from the concept of collaborative interaction with statements such as: “I feel like my manager advocates for me;” “I feel valued by my leader and colleagues;” “my team mates listen to me;” and, “people in my organization exchange information openly.” A qualitative component could be incorporated with open-ended questions such as tell me about a time you felt listened to by your leader. A mixed method research design would allow for sampling to occur across organizations and industries for a comparison of inclusive behaviors.

Ultimately, the knowledge gained from expanding research on inclusion can serve as a vehicle for helping non-inclusive organizations to become more inclusive in a society which is increasingly interdependent.

Concluding Remarks

My study was purposeful in its qualitative design to generate new theoretical propositions that could support future inclusion research as well as elicit benefits for practitioners in an area that is still under-developed. My strong desire to understand

how inclusion and contextual influences emerge within organizational life as a generative force compelled me to examine the characteristics of inclusive leadership, inclusive practices and behaviors, and climates and cultures of inclusion by exploring how these evolved within an inclusive organization.

This research uncovered how components of inclusion existed against the backdrop of an evolving context which was fueled by human connection and intentional change within the Loma School District. These dynamics resulted from a leadership influenced mesh of support that advanced inclusion at the micro, meso, and macro levels of this organization. Overlays of climate and culture emerged due to the intermingling of dimensions of inclusion and their processes within the organization's support netting of inclusion. This showed that the inner workings of an inclusive organization were characterized by people connections and work activities that generated inclusion through practices and behaviors that were made possible when leadership shaped a cultural space for this to occur. As these flourished, positive climates propagated. These were generative and solidified inclusive attitudes as represented with the school district's people first attitudes, global perspectives, and organic change.

This research expanded the theoretical discussion that has evolved in diversity and inclusion. It also raised awareness of how inclusion fosters strength and synergy by bridging aspects of leadership and change to promote human connection, intentional change, and evolving context for the good of an inclusive system and its stakeholders. Further, it extended climate and culture scholarship with evidence that these are interlinked within the framework of inclusive organization. The research contributed to

practical application as the presence of inclusion in organizations offers the prospect for new organizational capabilities that can increase collaboration and perseverance with Crossing Boundaries to Accelerate Progress. It also confirmed human connection and intentional change efforts can become natural forces of energy within organizations that are focused on inclusion.

The enlightening results from this research broadened the scope of current scholarship and established essential avenues for practical application. By illuminating inclusion's relevance to organizational behavior, the findings unveiled how inclusion positions systems generatively even with the complexities we face in today's work world. For me personally, this research holds powerful significance to application as it advances rich potential for practitioners of leadership and change. Specifically, the practical application of inclusion brings with it the capability to reshape relationships and routines in a manner that heightens connection, discovery, and growth within work contexts. The idea that climates and cultures of inclusion optimally energize individuals and groups to foster human connection and intentional change is pertinent as it presages break through advantages that would ordinarily remain untapped. Inclusive leadership's evolving context engages people in becoming a part of the equation, tapping into the energy of the whole system, to problem solve offering promise for crossing boundaries to accelerate progress in today's global society.

Appendix

Appendix A: School District Letter of Authorization/Cooperation

Letter of Authorization / Cooperation

June 21, 2016

Antioch University / Institutional Review Board (IRB)
Graduate School of Leadership & Change
900 Dayton Street
Yellow Springs, Ohio 45387

Please note that Maria Dezenberg, an Antioch University PhD student, has the permission of _____ School District to conduct research for her study titled: "Cases of Inclusive Leadership in a Grounded Theory Study."

The purpose of this study is to better understand how employees have experienced inclusion in our organization. The primary research activity will entail interviewing employees of different roles, levels, functions, and groups. Ms. Dezenberg will follow the below protocols when arranging participant interviews with volunteer employees.

In the event that Ms. Dezenberg has requests to observe a school district meeting, other activities, or review policies or documents pertinent to this study, these should be directed to _____ for approval.

Ms. Dezenberg has agreed to provide my office with a copy of the Antioch University IRB approved consent document before she finalizes the selection of participants and moves forward with interviews. The interviews will be transcribed by a professional transcription service bound by a confidentiality agreement. Any personally identifying descriptions will be eliminated from interview transcripts. Each participant will receive a copy of their transcript and given the opportunity to correct, add, and/or delete information for accuracy. Participants will have the option to stop participating in the study at any time.

The primary purpose of this study is to fulfill the requirement to complete formal research for her dissertation at Antioch University; however, we understand she may use the data and results of the study in future scholarly publications and presentations. The confidentiality agreement will be effective in all cases of data sharing. Ms. Dezenberg has agreed to make a full report of her research available to us as well as facilitate a pro bono presentation on the findings.

If Antioch University's Institutional Review Board (IRB) has any concerns about the permission being granted by this letter, please contact us at one of the phone numbers listed below.

Signature

Signature

Appendix B: Antioch University Institutional Review Board Application

Institutional Review Application for Ethics Review

Project Title: A Case of Inclusive Leadership in a Grounded Theory Study

Submitted: 2016-09-21 19:31:31

Application Status: Approved

Approval Type: Expedited

Application Retrieved From: <https://irb.antioch.edu/application.php?appid=2741>

1. Name and mailing address of Principal Investigator(s):

Maria Dezenberg

(mailing address deleted)

For faculty applications, Co-Principal Investigator(s) name(s): N/A

2. Academic Department: PHDLC

3. Departmental Status: Student

4. Phone Number: (a) Work [REDACTED] (b) Home [REDACTED]

5. Name of research advisor: Dr. Lize Booyen

6. Name & email address(es) of other researcher(s) involved in this project:

a) Name of Researcher(s)

N/A

b) E-mail address(es)

N/A

7. Project Title: A Case of Inclusive Leadership in a Grounded Theory Study

8. Is this project federally funded: No

Source of funding for this project (if applicable): N/A

9. Expected starting date for data collection: 09/19/2016

10. Expected completion date for data collection: 05/07/2017

11. Project Purpose(s): (Up to 500 words)

The purpose of this study is to understand more about the social processes that derive from inclusive leadership. A case study with grounded theory methods will be used to explore people's lived experiences with inclusive leadership within the context of a single organizational setting. The data that is gathered will be collected and analyzed throughout the process in accordance with constructivist grounded theory principles as the vehicle for developing theoretical propositions pertaining to the micro and meso level social processes that evolve from inclusive leadership.

12. Describe the proposed participants- age, number, sex, race, or other special characteristics. Describe criteria for inclusion and exclusion of participants. Please provide brief justification for these criteria. (Up to 500 words)

The participant organization inclusion criteria for this case study is based on the presence of inclusive leadership attributes which are outlined in the attachment titled: Inclusion Experience. The exclusion

criteria for the participant organization included: 1) there was no evidence of inclusive leadership as outlined in the Inclusion Experience attachment 2) the organization expressed challenges with the time commitment for a qualitative study and/or 3) the organization demonstrated a lack of interest.

The participant organization for this case study will be the School District in,xxxx. The School District serves over 5000 students with a high diversity rank index rating of 52.3%. This hybrid school district comprises of five traditional on ground schools / The district's virtual academies and K–9 boarding school have been excluded from this study as they vary significantly in structure and functions from the traditional on ground schools. Their inclusion could impede my ability to contextualize and define the parameters of this single case study, which is essential to this study. Additionally, the K–9 boarding school has unique cultural considerations as it serves a protected population (Native American students).

The case study interviews involve sampling members of the school district's hierarchy to establish a broad understanding of the organizational context. The proposed participants for these interviews will likely include the superintendent, human resources director, communications officer, and a board member as they are knowledgeable of the facts, events, and language surrounding this organization's work environment. Due to the emergent nature of grounded theory, it is possible that these early case study interviews will help to guide the inclusion and exclusion criteria of participants for the grounded theory interviews.

The grounded theory interviews will explore the social processes at the ground level of the organization that evolve from inclusive leadership. At this early juncture, the proposed participants for the grounded theory interviews will be full-time employees (18 years of age or older) in the role of school teacher, counselor, or support staff at the xxxxxx School District's on ground schools. The inclusion of these roles is important to this study as they represent the voices at the ground level within a school system. As noted, this plan may shift to involve other participants based on the data from the earlier case study interviews. As the initial sampling unfolds, I will begin to explore the emerging concepts in the data which may require additional sampling of populations with different perspectives or in different roles.

My goal is to insure volunteer participants in this study are representative of diverse age, sex, race, and other identity groups. This study will exclude students as minors are a protected population.

13. Describe how the participants are to be selected and recruited. (Up to 500 words)

Documentation of permission from the xxxxxx School District is attached in the final section of this application. The letter of approval/cooperation was provided by the school board and superintendent authorizing this study on inclusive leadership.

This study will involve two phases:

Phase I Case Study: The first phase of the study will involve the superintendent distributing an invitation to recruit volunteers from the school district's leadership hierarchy as an avenue to gain knowledge about the school district.

Phase II Grounded Theory: The second phase of the study will involve the superintendent distributing an invitation to recruit volunteers that are employees of the xxxxxx schools. This participant sample will emerge from the case study interviews, and be determined following Phase I. It will be a purposive sample.

There are two invitation drafts (one for each phase of the study) attached to Part III of this application.

14. Describe the proposed procedures, (e.g., interview surveys, questionnaires, experiments, etc.) in the project. Any proposed experimental activities that are included in evaluation, research, development, demonstration, instruction, study, treatments, debriefing, questionnaires, and similar projects must be

described. USE SIMPLE LANGUAGE, AVOID JARGON, AND IDENTIFY ACRONYMS. Please do not insert a copy of your methodology section from your proposal. State briefly and concisely the procedures for the project. (500 words)

The proposed procedure for this study involves intensive interviewing. Volunteer participants will be asked to engage in an audio-recorded interview with me that will be approximately an hour in length. The purpose of the interview will be to explore reflections on work experiences of being included in the

School District. The audio recording will be submitted to a professional transcriptionist service bound by a confidentiality agreement. I will eliminate any self-identifying descriptions from each transcript, and then share the transcript with the participant so he/she has the opportunity to correct, add, and/or delete information for accuracy. The final transcripts will be shared with my dissertation committee and coding partners during periods of discussion and analysis.

Additionally, the emerging data and hypotheses from this study will serve as the compass for triangulating my findings. This process may involve meeting observations and/or document reviews based on the interview data. Examples include: 1) observations of school or district level employee meetings and 2) document reviews of policies, procedures, meeting minutes or other relevant information.

15. Participants in research may be exposed to the possibility of harm - physiological, psychological, and/or social - please provide the following information: (Up to 500 words)

a. Identify and describe potential risks of harm to participants (including physical, emotional, financial, or social harm).

It is possible that volunteer participants may experience some discomfort when reflecting on interview questions. Participants will not be required to answer questions, and may opt to refrain from discussing topics that cause discomfort. Further, each participant will have an opportunity to review their transcripts, and add/delete/change any information for accuracy. Other possibilities of harm such as identification of the participant will be mitigated by the deletion of self-identifying data including no use of names or locations pertinent to that individual.

b. Identify and describe the anticipated benefits of this research (including direct benefits to participants and to society-at-large or others)

The opportunity to reflect on personal experiences with inclusive leadership may help participants to better understand their continuum of work experiences and professional development. At a broader level, the findings from this study may reveal more about the social processes that emerge when inclusive leadership is present. This may be a useful contribution to scholarship as this is a newer area of study within the diversity and inclusion research domain; and ultimately, the findings may allow me to develop avenues for helping practitioners better understand the value of inclusive leadership in today's global workplace.

c. Explain why you believe the risks are so outweighed by the benefits described above as to warrant asking participants to accept these risks. Include a discussion of why the research method you propose is superior to alternative methods that may entail less risk.

The risks to this study are minimal because participation is voluntary, and vulnerable populations are excluded. Further, this study will focus on qualitative interviewing which embraces a respectful, non-intrusive approach; and each participant will have the opportunity to review his/her interview transcript and make changes for accuracy.

d. Explain fully how the rights and welfare of participants at risk will be protected (e.g., screening out particularly vulnerable participants, follow-up contact with participants, list of referrals, etc.) and what provisions will be made for the case of an adverse incident occurring during the study.

Participation in this study is strictly voluntary. Participants may 1) opt not to answer questions during interviews 2) stop the interview at any time 3) review and edit their interview transcripts following the interview and/or 4) withdraw from the study at any time with no adverse effects. Vulnerable populations in this school district including the Native American school and all children (minors) have been excluded

from this study. With these provisions the possibility of an adverse incident occurring is minimal. In the event that a participant does need assistance, there are four mental health professionals situated within the xxxxxx School District that I can refer the individual to for support.

16. Explain how participants' privacy is addressed by your proposed research. Specify any steps taken to safeguard the anonymity of participants and/or confidentiality of their responses. Indicate what personal identifying information will be kept, and procedures for storage and ultimate disposal of personal information. Describe how you will de-identify the data or attach the signed confidentiality agreement on the attachments tab (scan, if necessary). (Up to 500 words)

Following each interview, the data will be transcribed by a professional transcription service bound by a confidentiality agreement. I will remove all self-identifying information from the transcripts and share it with each participant for approval to insure anonymity for all participants. The final transcripts will only be shared with my dissertation committee and coding team during periods of analysis over the course of this study unless written permission is granted by a participant (s) to do otherwise. Over the course of this study my research notes, transcripts, and recordings will be kept in a locked, secure location.

My drafted letter of consent is included on the attachments tab of this application. Written at an 8th grade reading level, it details this plan for safeguarding the anonymity of participants.

17. Will audio-visual devices be used for recording participants? Will electrical, mechanical (e.g., biofeedback, electroencephalogram, etc.) devices be used? (Click one) Yes

If YES, describe the devices and how they will be used:

A hand held digital audio recorder will be used to record each interview for transcription purposes.

18. Type of Review: Expedited

Please provide your reasons/justification for the level of review you are requesting.

An expedited review is being requested as there will be minimal risk to participants and this study fits into the category of research for this type of review. Specifically,

1) I will interview volunteer participants about their work experiences to better understand social processes which will entail researching individual / group behaviors.

2) Data collection will occur by way of digital audio recordings.

3) My research may involve materials such as documents or other data.

19. Informed consent and/or assent statements, if any are used, are to be included with this application. If information other than that provided on the informed consent form is provided (e.g. a cover letter), attach a copy of such information. If a consent form is not used, or if consent is to be presented orally, state your reason for this modification below. *Oral consent is not allowed when participants are under age 18.

20. If questionnaires, tests, or related research instruments are to be used, then you must attach a copy of the instrument at the bottom of this form (unless the instrument is copyrighted material), or submit a detailed description (with examples of items) of the research instruments, questionnaires, or tests that are to be used in the project. Copies will be retained in the permanent IRB files. If you intend to use a copyrighted instrument, please consult with your research advisor and your IRB chair. Please clearly name and identify all attached documents when you add them on the attachments tab.

I have agreed to conduct this project in accordance with Antioch University's policies and requirements involving research as outlined in the IRB Manual and supplemental materials.

Appendix C: Invitation to Participate

Dear

A research study has come to my attention that you might be interested in. Please note that participation in this study is voluntary and entirely up to you with no impact on your employment. I have attached the consent form from the researcher that provides more information and outlines the commitment to confidentiality

If you are interested, you should contact the researcher (Maria Dezenberg) directly at XXXXXX or XXXXXX.

Sincerely,

Appendix D: Consent Form

Consent Form

This informed consent form is for full-time employees from XXXXX School District who we are inviting to participate in a research project titled “A Case of Inclusive Leadership in a Grounded Theory Study”.

Name of Principle Investigator: Maria Dezenberg

Name of Organization: Antioch University, PhD in Leadership and Change Program

Name of Project: A Case of Inclusive Leadership in a Grounded Theory Study

You will be given a copy of the full Informed Consent Form

Introduction

I am Maria Dezenberg, a PhD candidate for Leadership and Change at Antioch University. As part of this degree, I am completing a project on inclusive leadership; specifically, learning what employees experience when work settings are participative and inclusive. I am going to give you information about the study and invite you to be part of this research. You may talk to anyone you feel comfortable talking with about the research, and take time to reflect on whether you want to participate or not. You may ask questions at any time.

Purpose of the Research

The purpose of this project is to interview full-time employees in XXXXXX School District to learn more about the school district and employee experiences with participation and inclusion. This information may help us to better understand the positive outcomes of such employee experiences which could benefit other schools and organizations.

Type of Research Intervention

This research will involve your participation in a minimum of one audio-recorded phone interview with me that will last up to an hour, where we will explore your reflections on your work experiences. Each of these interviews will be tape recorded solely for research purposes, but all of the participants' contributions will be de-identified prior to publication or the sharing of the research results. These recordings, and any other information that may connect you to the study, will be kept in a locked, secure location.

Participant Selection

You are being invited to take part in this research because you are knowledgeable about XXXXXX School District. You should not consider participation in this research if you are a part-time employee and/or under 18 years of age.

Voluntary Participation

Your participation in this study is completely voluntary. You may choose not to participate. You will not be penalized for your decision not to participate or for anything of your contributions during the study. Your position in the School District will not be affected by this decision or your participation. You may withdraw from this study at any time. If an interview has already taken place, the information you provided will not be used in the research study.

Risks

No study is completely risk free. However, I do not anticipate that you will be harmed or distressed during this study. You may stop being in the study at any time if you become uncomfortable. If you experience any discomfort as a result of your participation, employee assistance counselors will be available to you as a resource.

Benefits

There will be no direct benefit to you, but your participation may help others in the future.

Reimbursements

You will not be provided any monetary incentive to take part in this research project.

Confidentiality

All information will be de-identified, so that it cannot be connected back to you. Your real name will be replaced with a pseudonym in the write-up of this project, and only the primary researcher will have access to the list connecting your name to the pseudonym. This list, along with tape recordings of the discussion sessions, will be kept in a secure, locked location.

Limits of Privacy Confidentiality

Generally speaking, I can assure you that I will keep everything you tell me or do for the study private. Yet there are times where I cannot keep things private (confidential). The researcher cannot keep things private (confidential) when:

- The researcher finds out that a child or vulnerable adult has been abused
- The researcher finds out that that a person plans to hurt him or herself, such as commit suicide,
- The researcher finds out that a person plans to hurt someone else,

There are laws that require many professionals to take action if they think a person is at risk for self-harm or are self-harming, harming another or if a child or adult is being abused. In addition, there are guidelines that researchers must follow to make sure all people are treated with respect and kept safe. In most states, there is a government agency that must be told if someone is being abused or plans to self-harm or harm another person. Please ask any questions you may have about this issue before agreeing to be in the study. It is important that you do not feel betrayed if it turns out that the researcher cannot keep some things private.

Future Publication

The primary researcher, Maria Dezenberg, reserves the right to include any results of this study in future scholarly presentations and/or publications. All information will be de-identified prior to publication.

Right to Refuse or Withdraw

You do not have to take part in this research if you do not wish to do so, and you may withdraw from the study at any time without your job being affected.

Who to Contact

If you have any questions, you may ask them now or later. If you have questions later, you may contact: Maria Dezenberg. Email: XXXXXX.

If you have any ethical concerns about this study, contact Lisa Kreeger, Chair, Institutional Review Board, Antioch University Ph.D. in Leadership and Change, Email: XXXXX

This proposal has been reviewed and approved by the Antioch International Review Board (IRB), which is a committee whose task it is to make sure that research participants are protected. If you wish to find out more about the IRB, contact Dr. Lisa Kreeger.

DO YOU WISH TO BE IN THIS STUDY?

I have read the foregoing information, or it has been read to me. I have had the opportunity to ask questions about it and any questions I have been asked have been answered to my satisfaction. I consent voluntarily to be a participant in this study.

Print Name of Participant _____

Signature of Participant _____

Date _____
Day/month/year

DO YOU WISH TO BE AUDIOTAPED IN THIS STUDY?

I voluntarily agree to let the researcher audiotape me for this study. I agree to allow the use of my recordings as described in this form.

Print Name of Participant _____

Signature of Participant _____

Date _____
Day/month/year

To be filled out by the researcher or the person taking consent:

I confirm that the participant was given an opportunity to ask questions about the study, and all the questions asked by the participant have been answered correctly and to the best of my ability. I confirm that the individual has not been coerced into giving consent, and the consent has been given freely and voluntarily.

A copy of this Informed Consent Form has been provided to the participant.

Print Name of Researcher/ person taking the consent

Signature of Researcher /person taking the consent

Date _____

Day/month/year

Appendix E: Guide for Case Study and GTM Probing Prompts

Semi-Structured Interview Questions (Case Study)

Question #1 Describe your role and focus in the School District?

Question #2 What are some of the key activities and/or processes that you support and/or facilitate?

Question #3 Can you elaborate more on _____?

Question #4 How do you work with the District's schools?

Question #5 Can you share an example of this?

Question #6 What else do you feel it is important to share?

Opening Interview Question and Probing Prompts (Grounded Theory Interviews)

Question #1

Share with me how participation and inclusion have been a part of your work experience.

Question #2

How does this happen in your school?

Question #3

What is it like for you when this happens?

Question #4

You talked about _____, can you reflect more on that?

Question #5

What other examples can you share?

Question #6

What else do you feel is important to share?

Appendix F: Participant Numbering

Interview Type	Employment Location	Title/Roles	Interview Ordering
C = Case Study G = Grounded Theory	Numerals 1-7 = Employment Location	Letters a-g = Participant Roles	Numerals = Participant Order i= in person

Appendix G: Case Study Thematic Categories, Supporting Codes, and High Frequency Descriptors

<p>Highest Frequency Descriptors Involve: 39x Community: 36x Care / Support / Resources: 34x Improve / Progress: 30x Ask / Input / Listen: 30x Align: 25x Relationships: 22x</p>	<p>Additional High Frequency Descriptors Team 18x Understand: 13x Connect: 8x Coach: 6x Interact: 7x Partner: 4x</p>
<p>Category: Relationships</p>	
<p>Supporting Codes</p> <p>Value placed on relationships Open relationship with leader Connect with people Connection with people allows for success Connection occurs when work feels like family Size limits connection Caring approach Need for people to feel cared about Gestures of support coach Showing care is appreciated Showing care Responsiveness to concerns Showing concern Create context where people feel they are part of a family Develop trust Learn from leader Leader is visible Leader works to understand schools by experiencing them Out and about approach Out about approach prevents insulation Uses walk and talk approach Superintendent is out in the schools observing and speaking to people Superintendent in schools Observes in schools Observes to see if work is aligned with strategy Walk and talk approach is viewed as caring Union supports walk and talk approach Moving about district and talking to people Leadership is talking to employees and students Intentional about sacrificing time to listen to people Leader listens to people Interacts with students Asks questions Asking open-ended questions Asking questions to formulate plans Focus on asking questions Develop employees to ask questions Help staff understand cultural differences Value placed on relationships that are not top-down Intentional about building relationships and trust Make people equals Building strong partnerships with stakeholders Making time for people is crucial to success Need to interact and know who people are Inviting the community to be a part of the discussion Involving community in the schools Provide opportunity for teams to interact is crucial Work as team Work through issues as a team Processes involve collaboration amongst stakeholders Address silos and interpersonal connection Decrease silos</p>	

Minimize silos (3x)
 Initiatives fall flat without **relationships**
 Success is built on **relationships**
 Truancy board process engages student and family
 Developing **relationships** with unions
 Developing trust with unions
 Mentoring students by **asking** questions
 Employee encouraged to mentor students
 Students learning to work with **community**
 Employees involved in the **community**
 Engaged in organizations focused on **improving** the **community**
 Superintendent **supportive** to employee **involvement** in student life
Community involvement in student learning process
Community members **involved** in after school program
 Establish partnerships to build positive interventions for children
Community support to prevent drop outs
Community partnership for drug prevention
 People collaborated during wild fire crisis
 People carried each other
 Crisis brought people together
 Understanding why the tribes distrust white people
 Working to **improve relationship** with tribal leadership
 Understanding of issues parents face
 Understands importance of **connecting** with teachers and students
 Seeking applicants that can build **relationships** and work well with others
Relationships-building skills are critical to a safe learning environment
 Strong **relationships** in former positions have a heavy weight in hiring decisions
 Hiring committee is looking for people who will be a good fit
 Hiring for some positions like coaches can be contentious
 Takes pride in hiring the best people possible
 It is hard to find the right fit for this **community** when hiring

Category: Involvement

Supporting Codes

Open to employee ideas
 Mindset that the leader is a facilitator, employees are the experts
Community perspective
 Opportunities to be **involved**, not everybody wants to
 Opportunities for **involvement**
 Engaged in understanding the organization's needs
 Offering choices and options
 Stakeholders bring up questions and concerns
 Internal and external stakeholders sharing perspectives
 Stakeholders assessing options
 Employees have a voice in goals
 Stakeholder **input** used to formulate plans
 Stakeholder work groups recommend adjustments to the plan for **improvement**
 Encourage employee dialog on performance data
 Stakeholders **involved** in analyzing data and prioritizing timeline
 Stakeholders review data, evaluate **progress**, determine next steps
 Stakeholder work groups assess **progress** with strategic plan
 Stakeholder **involvement** with identifying successes and **improvement** areas are crucial
 Insures opportunities for stakeholders to show what is working well
 Engaging stakeholders through social media
 Wants teacher and administrative leaders to figure out strategies for **improvement**
 Stakeholders **involved** in real estate and financial discussions
 Ideas emerged during the process
 Building level leadership teams establish goals to **align** with district objectives
 Building level leadership teams are **involved** in the review of district goals
 Structure of building level leadership team gives everyone an opportunity to be involved
 Stakeholders **involved** in the process for developing District's facility plan
 Internal and external stakeholder **involvement** in facility plans
 Opportunities for teachers, parents, classified staff to be **involved** in building level leadership teams
 Stakeholder work groups include different employees' roles and parents
 Stakeholders invited to provide **input** when the district develops strategy
 Process **involved community** forums for **community input**

Involvement in district goals
 Developing mindsets to see positive indicators
 Included in contract negotiations for learning purposes
 Students **involved** in finding opportunities to **support community** members
Involved in defining her role
Involvement in curriculum adoptions process
 Employees make the final decision on instructional materials
 Employees have a voice in curriculum decisions
Community involvement in facility planning
Involvement in establishing a clear identity
 Opportunity to share with students
Involvement in student life
 Engagement in student activities
 Adjusted process for teacher professional development based on their suggestions
 Adjusted process for teacher development based on their **input**
 Student-driven after school program
Support for district employee **involvement** in schools
 Hiring committees include the school leaders and teaching staff members
 Students, parents, **community involved** in hiring committees for high profile positions
 Monthly department meetings **involve** transportation, maintenance, curriculum and learning, communication, after school, special ed, HR, and financial departments
Involved staff and **community** in surveys to understand issues and develop goals
 The survey was a safe place for people to give **input**
 The survey helped guide our direction and plan
Community is **involved** in the long-range facility plan

Category: Communication

Supporting Codes

Emphasis on interacting with internal and external stakeholders
 It is a dialog not a monolog
 Belief in a coaching approach
 Emphasis on questions and coaching
 Develops a coaching **relationship** through conversation
Input from stakeholders
Input solicited from stakeholders throughout the process
 Soliciting **input** from the **community**
 Soliciting **input** from everyone
 Solicit **input** from stakeholders
 Solicit **input**
 Interacting with stakeholders by **asking** questions
Asking internal and external stakeholders for input and opinions
Ask questions when there are challenges
 Soliciting feedback for continuous **improvement** purposes
 Welcomes external feedback
 Embraces external feedback as helpful for continuous **improvement** planning
 Acknowledge important information is coming from teachers
 Importance placed on objective **input**
 Soliciting participation through questioning rather than telling and interpreting
 Superintendent facilitates
 Formal and informal protocols for communication with principals
 Superintendent engages in conversation and **asks** for feedback
 Talks with employees and students of all levels in different places
Listening to teacher concerns
Listen to input
 Transparency
 Generates conversation in the **community**
 Sharing with the **community**
 Develops communication channels in the **community**
 Interacts with students
 Communication with parents and students
 Social media was most effective during wild fires
 Sharing our brand and measures for success
 Share our value of **caring**
 Communicating values and goals
 Board **support** for communication strategy

Insuring stakeholders are aware of how **resources** are being used
 Sharing good and bad news
 Share our student focus
 Visual acknowledgement of student achievement
 Updates to stakeholders on process, data, next steps
 Frequent updates to **community** during wild fires
 Utilizes different methods of communication
 Making the **community** a part of the schools
 Dedicated position to **community relations** and communication
 Communication position new to district
 Keeps team informed
 Discuss needs for programs, positions, structures needed for change
 Meetings are beneficial because they keep me well informed
 Meetings give an overview of the whole district
 The cabinet meeting is a safe place to share information
 Perceives everyone feels the importance of the cabinet meetings
 Shares with the schools her interactions with applicants
 Monthly department meetings **involve** sharing to keep people informed
 Practice of sharing at meetings is beneficial
 There is a lot of **listening** as others share at the department meeting
 Each department shares what is going on followed by questions
 Sharing a challenge during the meeting led to a colleague helping with a solution
Input used from others to enhance hiring search strategy

Category: Internal | External Forces

Supporting Codes

Challenge is that society does not appreciate educators
 Facing pay and inequity challenges
Community demographics 45% Caucasian, 60% Hispanic and Native
 Student make up 1/3 white, 1/3 Native, 1/3 Hispanic
Community home to large native population
 12 Indian tribes are on one reservation
 Conflict amongst 12 tribes
 Conflict amongst tribes
Tribes with different languages
 Tribal **community** is unpredictable
 Complex system of advocacy groups for Native children
 Social issues and tribal identifies make it challenging to develop **relationships**
 Understanding of complexity **involved** with building long-term **relationships** with tribal leaders
 Overcoming poor **community relationships**
 History of poor **community** dynamics, people not working together
Community faces issues of poverty, drugs, alcohol
 Poverty is an issue for the kids
 Few natives on the staff
 Schools were doing their own thing before this superintendent
 People out of sync when initiatives are not **aligned**
 Acknowledgement of silos
 26-27% Native children in district, many with attendance and discipline issues
 Different student groups have different needs
 Looking for solutions to address that 74% of 3rd graders are not at grade level
 Working with a wide range of development levels in classrooms
 Faced with challenges with **aligning** instructional frameworks
 Activities with schools and teachers to **align** schools
Misalignment of curriculum led to difficult grade level transitions
 Poor morale, employee turnover result without **support** and **involvement**
 Perception of control
 Wild fire crisis
 Dealing with crisis
 Resolving poor physical conditions
 Experiencing growth (3x)
 Consideration to how to **support** 40 new hires
 Concerns with finding qualified teachers
 Acknowledged tension with change
 Learning new systems
 State started a new evaluation system

Category: Focus
<p>Supporting Codes</p> <p>All have same objective to graduate all students Focus on graduating 100% of students Focused on main goal of student success Continuous improvement with alignment Focused on moving in the same direction Focused efforts Aligning the schools Building a vision and broadening horizons Focused on vision Long-range goals for improvement Focused on shared goals and interdependence within system Building shared understanding Developed common focus, common language Figuring out optimal ways to communicate Establish what the problems are Finding solutions to challenges Overcome obstacles Establish agreement on priorities (3x) Setting goals, indicators, measuring them Specific goals and indicators Focus on goals Goals are concise Keep goals simple Keep things simple Keep tools simple Keep goals simple and concise Clear, concise goals including alignment Focus on data to assess current state Soliciting objective feedback on areas to improve Refining the plan Adjustments and changes Align goals with evaluation Assessing if processes are aligned with goals Emphasis on assessing and measuring progress Actions align with goal and vision to set students up for success Prioritizing Track progress against goals Effective use of time Bring different perspective Offer different options Consider the options Use feedback to re-evaluate the strategic plan Goals are monitored and revised Envisioning next steps Continuous improvement with strategic plan Continuous improvement with the strategic plan Understanding public perception Present clear picture of who we are (2x) Clarity with who we are Streamlined for Overcome obstacles to get assistance for kids Focused on solution to offset impact of poverty Focus on kids needing help Continuous focus on student needs Working to overcome social issues that impact children Resources for struggling and homeless families (2x) Positive intervention to create safety net for potential drop outs Establish positive interviews for students and families (2x) Offer support and opportunity to children Support for those in need Insured support to staff and students during fires Not allowing school to be a burden to people</p>

Support for those in need (2x)
 Arranged resources for those in need
 Offering **support**
 Finding ways to engage students in school
 After school opportunities
 Promoting student **involvement** in school
 Embrace same process for all schools
 Continuous **improvement** with teaching
 Continuity with evaluation and **support** systems to **support** teachers changing levels
 Implement measures to support **alignment** of schools
Align resources for classroom **support**
 Common language for teachers
 Work on teaching strategies and best practices
Aligning curriculum for whole system
Aligning evaluation process
 Priorities include professional development and implementing best practices
 Commitment to professional development
 Planning to accommodate growth
 Hiring more teachers to lower class sizes
 We are intentional about **alignment** in the district
 Ideas need to **support** the target
 Focus is a on a well-rounded program with academics, athletics, arts
 K-12 curriculum is being **aligned** across the district
 Perception that staff are informed about the direction and **supported** to move in that direction
 Before everyone was doing their own thing
 Before the schools did not **align** their curriculum
 Now we have a process for curriculum adoption
 Keeping it simple to prevent stray arrows
 There is intentional focus on our direction, and programs and **resources** to **support** it
 Feels better to have a clear direction
 Facility project will include securing a bond

Category: Practices, Behaviors, Actions

Supporting Codes

Participation and **involvement**
 Brainstorming in district team meetings
 Offsite building level leadership team meetings
 Building level leadership teams provided with extra time to review goals, assess needs
 Building level leadership teams established district's goals
 Rotating building level leadership teams on 3 year cycle
 Building level leadership teams set annual goals
 Stakeholder work groups determine changes to strategic plan
 Presence at school building level leadership team meetings
 Evolving **improvements** with systems accreditation process
 Self-assessing by **asking** questions, answering questions, showing evidence for accreditation
 Reflection through self-assessment
 Reviewing test data, tracking indicators
 Soliciting external feedback via systems accreditation process
 Structure and practices help with **connecting** people to the goals
 School schedule accommodates opportunity for employees to communicate and **connect**
 Schedule structure allows building level leadership teams to share with school teams
 Dedicated time to discuss **alignment** practices
 Giving teachers time is a form of compensation
 Implemented compensation for teacher trainings
 Virtual, confidential mentoring arranged for new teachers
 New teacher mentoring program is not tied to evaluation
 Offering mentoring **support** to new teachers
 Partnered with external instructional coaches
 External coaches helped with **alignment** and use of common language
 Curriculum adoption process **involves** dialog
 Curriculum adoption **involves** sharing, testing out, seeking input
 Developed an evaluation tool for curriculum adoption
 Process for insuring equity and fairness in instructional materials
 Implementing structure to streamline evaluation process across grades
 Working to **align** education to local Native school
Improving teaching with practices not tied to evaluation

Process established to broaden teachers' thinking
 Individualized **support** for new teachers
 Tracking student engagement in classrooms
 Examining if students can articulate why and what they are learning
 Data driven decision to focus on early childhood literacy
 100% free lunch program to offset issues with poverty
 Developed preventative measures for drop outs
 Established truancy board for dropout prevention
 Process of recording bus rides changed parent behavior
 Understands each student and family is a unique case
 Every child is different
 Mindset of creating possibilities
 Focus on people rather than paper
 Focus on people not paper
 Undeterred by challenges
 Assigning blame and making excuses are not allowed
 Objectivity and professionalism are expected
 Questions bureaucracy
 Relies on experience and research
 Focus on removing obstacles
 Discontinued initiatives that were not **aligned**
 Good practices that didn't **align** were discontinued
 Avoid scenarios of lay off
 Overcoming challenges of crisis
 Chose to come to school during crisis
 Demonstrated flexibility during crisis
 Figured out best way to communicate with people during crisis
 Attention to detail during crisis
 Emphasis on school as safe place
 Establish normalcy and safe conditions during crisis
 Emphasis on normalcy and safe place
 A whatever is needed attitude
 Getting it done mentality during crisis
 Flexibility with people's needs
 Extended flexibility during crisis
 Informal gatherings optional
 A shift in attendance with informal gatherings
 Learning with a team book reading
 Monthly opportunity to **connect** informally outside of district
 Informal gathering opens opportunity for employees to reflect and share
 Teachers receive time for training
 Use the Marzano instructional framework
 Mentor **support** available for employees that are struggling
 Reference checks are the most important hiring practice
 Encourages the hiring committee to evaluate the department's weakness and hire to strengthen it
 Specific practices are followed by the hiring committee
 Training is required to participate in hiring committees
 Strict practices employed when interviewing applicants
 The same thing is done with each applicant
 No free conversation is permitted between hiring committee and applicants to insure fair practice
 Defined HR practices
 Aim never to be challenged on an applicant being treated unfairly
 Occasionally confidentiality issues arise even with signed confidentiality statements
 Monthly department meetings are well attended
 Early release Mondays give staff time to collaborate
 HR needs to have firm procedures when working with the **community**
 HR practices have become well-defined

Category: Context
Supporting Codes

Work in **progress** (2x)
 Acknowledges it is a work in **progress**
 Believes in continuous **improvement**
 Continuing process

Opportunity to change and **improve**
 Acknowledges **progress** with overcoming challenge
 Considering possibilities
 Solutions-focused
 Openness to discovering areas for **improvement**
 Creativity and commitment are necessary to overcome obstacles
 Willing to make changes
 Working through challenges to achieve main goal
 Even with differences there is continued focus on how to be better
 Experience from **improving** is good
 Emphasis on being a district that **listens** and **cares**
 Attention to maintaining a balance for employees
 Emphasis on basics feeds successful outcomes
 Trying to overcome societal challenges in small ways
 Positive response to seeing kids trying to be responsible
 Appreciate **community involvement**
 Student **involvement** in after school activities is good
 Ahead of curve with state regulations
 Understanding how roles and responsibilities contribute to big picture
 All employees are committed to long-range goal of student success
 Emphasize what is right and continue to engage in the process to **improve**
 Air of openness
 Feeling of comfort
 Stakeholders comfortable sharing ideas
 Good things have taken place
 Good atmosphere
 Pride in workplace
 Acknowledges a positive climate
 Enjoys work
 Work is fun
 Fun at work
 Celebrate the team
 Celebrate achievement
 Enjoys learning and working with the team
 Feel comfortable like they belong and fit in
 Awareness of disconnect
 Perception that administrators believe in superintendent and district changes
 Employees receive leader's presence positively
 Perception that leader's experience is helpful
 Strong belief in superintendent and district changes
 Feedback that people are pleased leader **listens**
 Perception that teachers are happy with district's direction
 Perception that teaches are pleased with leader
 Perception that employees feel good about having a voice
 People appreciate it is not a top-down **relationship** with leader
 Process **involving** stakeholders received positively
Involvement in process viewed positively
 Feels like there is buy in
 Evidence of happy students
 Identifies with being a part of an organization that impacts **community**
 Perceives after school program to be well received
 Happy to have funding for initiatives
 Amazed with truancy board intervention outcomes
 Appreciates employees other than teachers being **involved** with students
 Realizing **progress** on truancy board initiative
 Different atmosphere following crisis
 People rallied through crisis
 Returning to school after crisis was positive
 Close-knit
 Close-knit **community**
 Whole operation has evolved
 Positive about the progress with the K-12 curriculum **alignment**
 Perceives there is a greater understanding of our goals and direction in the district
 There is the perception that the certified staff feels **supported** and heard

Appendix H: High Frequency Descriptor “Involve” Maps Across Categories

High Frequency Descriptor: Involve	Thematic Categories
1. Involving community in schools	Relationships
2. Processes involve collaboration amongst stakeholders	Relationships
3. Superintendent supportive to employee involvement in student life	Relationships
4. Community involvement in student learning process	Relationships
5. Community members involved in after school program	Relationships
6. Opportunities to be involved , not everybody wants to	Involvement
7. Opportunities for involvement	Involvement
8. Stakeholders involved in analyzing data and prioritizing timeline	Involvement
9. Stakeholder involvement with identifying successes and improvement areas are crucial	Involvement
10. Stakeholders involved in real estate and financial discussions	Involvement
11. Building level leadership teams are involved in the review of district goals	Involvement
12. Stakeholders involved in the process for developing district’s facility plan	Involvement
13. Internal and external stakeholder involvement in facility plans	Involvement
14. Opportunities for teachers, parents, classified staff to be involved in building level leadership teams	Involvement
15. Process involved community forums for community input	Involvement
16. Involvement in district goals	Involvement
17. Students involved in finding opportunities to support community members	Involvement
18. Involved in defining her role	Involvement
19. Involvement in curriculum adoptions process	Involvement
20. Community involvement in facility planning	Involvement
21. Involvement in establishing a clear identity	Involvement
22. Involvement in student life	Involvement
23. Support for district employee involvement in schools	Involvement
24. Understanding of complexity involved with building long-term relationships with tribal leaders	Internal & External Forces
25. Poor morale, employee turnover result without support and involvement	Internal & External Forces
26. Promoting student involvement in school	Focus
27. Participation and involvement	Practices, Actions, Behaviors
28. Curriculum adoption process involves dialog	Practices, Actions, Behaviors
29. Curriculum adoption involves sharing, testing out, seeking input	Practices, Actions, Behaviors
30. Appreciate community involvement	Context
31. Student involvement in after school activities is good	Context
32. Process involving stakeholder received positively	Context
33. Involvement in process viewed positively	Context
34. Appreciates employees other than teachers being involved with students	Context

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