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Global Competency and International Context at Aspiring Public Charter School

Joshua Symonds
joshua.symonds@ffca-calgary.com

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Global Competency and International Context at Aspiring Public Charter School

by

Joshua C. Symonds

AN ORGANIZATIONAL IMPROVEMENT PLAN

SUBMITTED TO THE SCHOOL OF GRADUATE AND POSTDOCTORAL

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Abstract

Teaching and assessing global competencies are areas of research that have become the focus of many educational organizations. This organizational improvement plan (OIP) examined the problem of a lack of global competencies taught, and international context provided, in an urban Canadian public school. The internal and external contextual landscape of the organization were considered, and available data analyzed to establish the need and readiness for change. Four primary solutions are proposed to solve this problem of practice: status quo and communication, international programs, strategic partnerships, and global competency education. Relying on contextual knowledge that connects the theories of servant, authentic, and distributed leadership with the change path model and the four frames of leadership, an organizational change framework has been developed. This framework, the Change Climb, will need to be tested and evaluated within a variety of institutions in order to accurately assess its adaptability and success. The hope would be that it becomes a flexible and effective tool to facilitate deliberate change in any organization. This OIP also describes a plan for measuring, monitoring, and evaluating change by employing the Lean Startup methodology.

Keywords: global competencies, international context, change path model, four frames of leadership, servant leadership, authentic leadership, distributed leadership, change climb, Lean Startup

Executive Summary

In this organizational improvement plan (OIP) I attempt to solve the problem of a lack of

global competencies taught, and international context provided, at Aspiring Public Charter

School (APCS). This problem of practice (POP) is addressed through the development of a

context-specific, yet portable, change model called the Change Climb. The Change Climb is a

theoretical and contextual framework that combines the change path (Cawsey, Deszca, & Ingols,

2016) and the four frames of leadership (Bolman & Deal, 2017), and is viewed through the

theoretical lenses of servant leadership (Greenleaf, 1977; Liden, Henderson, Wayne, & Zhao,

2008), authentic leadership (Avolio, Walumba, & Weber, 2009; Duncan, Ecung, Gergan, &

Green, 2017; George, 2003) and distributed leadership (Gronn, 2000, 2002, 2008, 2016; Harris

& Spillane, 2008; Orlina & Spillane, 2005; Spillane, Diamond, Walker, Halverson, & Jita,

2001). Chosen specifically for the organizational leadership model and previously used change

processes within APCS, this contextual change framework is intended to guide the journey from

current to desired organizational state. Within this three-chapter OIP I describe the

organizational context and POP, the planning and development of a model for leading change,

and a detailed program for implementation, evaluation, and communication. My expectation for

this plan is that it will augment change facilitation as APCS transitions from a highly effective

public school to a highly effective international public school.

Chapter 1 articulates the APCS organizational context with particular focus on where

public charters schools are placed on the Alberta education landscape. The mission, vision, and

values and the positing of agency, power, and personal voice are explained. I describe the gap

between the current and desired organizational state through the lenses of contextual leadership

theories and the POP. Through a PESTE analysis and the examination of relevant data, a need

for change is determined. The chapter concludes with a vision for change and an analysis of the

contextual change readiness.

Chapter 2 focuses on how the change at APCS will occur. Amalgamating the change path

by Cawsey, Deszca, and Ingols (2016) and Bolman and Deal's (2017) four frames of leadership

with servant leadership (Greenleaf, 1977; Liden, Henderson, Wayne, & Zhao, 2008), authentic

leadership (Avolio, Walumba, & Weber, 2009; Duncan, Ecung, Gergan, & Green, 2017), and

distributed leadership (Gronn, 2000, 2002, 2008, 2016; Harris & Spillane, 2008; Orlina &

Spillane, 2005; Spillane et al., 2001) theories, I develop an original, contextual change

framework called the Change Climb. Once articulated, I use this model and the theories

contained therein to complete a critical organizational analysis and propose four primary

solutions: status quo and communication, international programs, strategic partnerships, and

global competency education. All four of these solutions are effective in their own right, but

activating various stakeholders to engage in all four solutions is suggested as the most effective

manner to complete the change process.

Chapter 3 concentrates on the plan to implement, evaluate, and communicate the

proposed change. I explain a specific change implementation plan and explore stakeholders,

resources, issues, and limitations. The Lean Startup methodology (Lean Startup Co., n.d.) is

suggested as a contextually appropriate model for monitoring and evaluating the change process.

Chosen for its congruency of nimbleness and efficiency, this build-measure-learn model reflects

the characteristics specifically associated with previous change processes at APCS. Chapter 3

concludes with a communication plan specific to the various levels of stakeholders and methods

appropriate for efficiently navigating the change from the current to the desired organizational

state.

The goal of this OIP is to address the lack of global competencies taught, and international context provided, at APCS. However, the completion of the suggested changes may achieve a loftier objective. Articulated within the next steps and future considerations section that concludes this OIP is the hope that other public schools and jurisdictions will be inspired to progress to their desired organizational state, whatever their specific focus may be. The greater anticipation is that public education will evolve to provide educational platforms, through specialization and autonomy, that allow for new standards of learning and achievement. This OIP moves beyond the vison and goals for one school and provides a glimpse into perhaps what the next evolution of public school education may be. The model of the local community school that can provide education for all in a global unknown future has become antiquated. Within this OIP is a description of how one school within the broader and inclusive educational landscape could specialize to provide a specific model of education. Public school systems have the ability to diversify their instruction and learning to provide the inclusivity and the training for the future that all students need. The school systems that succeed are already moving in this direction, questioning the educational status quo and pushing and pulling the resistors of change to an inclusive, system-based model in the process. The essence of this OIP is how one public system is pioneering this movement.

Acknowledgements

In the spring of 2005, I decided to give education one more chance and applied for a position as a Grade 8 English/social studies teacher at APCS. I truly want to thank those who established public charter schools in Alberta, and specifically those who worked tirelessly to create and establish APCS. I found an organization that shared my values and my passion for helping kids succeed in whatever endeavour they choose. A truly amazing place to work and learn.

To all my colleagues and professors in my Western doctoral cohort—I believe over the last three years relationships were developed that will continue to bloom both professionally and personally. Specifically, I would like to acknowledge Alan Hesketh and Kyle Hawkins, who provided support and humour through the long hours of this academic program and some difficult times in my own professional life. This cohort has been supportive, engaging, and challenging without the tension or competition I have experienced in past academic endeavours. A truly complex and collaborative learning environment.

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To my partner, Brandi Symonds, for putting up with, sometimes begrudgingly, my desire to continually pursue my own academic endeavours. You are the foundation of our family and the glue that holds it together. We made it. I love you.

To my son, Oakley Symonds. I hope that the long hours of work and commitment you witnessed help provide a small part of your motivation and "stick-to-it-iveness" to pursue your dreams and desires regardless of what others may say or do.

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Dedication

In memory of my dad, Conard A. Symonds (1948–2013)

Doc Holliday: What did you ever want?

Wyatt Earp: Just to live a normal life.

Doc Holliday: There's no normal life, Wyatt, it's just life. Get on with it.

(Daniel, Jacks, Misiorowski, & Cosmatos, 1993)

It is well . . .

(Spafford, 1876, p. 78)

Chapter 1: Introduction and Problem

This work is a three-chapter organizational improvement plan (OIP) designed to address the problem of practice (POP) of a lack of global competencies taught, and international context provided, at Aspiring Public Charter School (APCS). In it I outline a process for APCS to understand, evaluate, and implement the changes needed to move from the current to the desired organizational state. Chapter 1 considers the organizational context, describing the current vision, mission, values, and goals of the organization and how this context affects the leadership within. In the first half of the chapter, I describe agency, power, and personal voice as they relate to the leader's position and addresses the theoretical and experiential lens of the leader. A POP statement articulates the relevant gap between current practices and the desired organizational state. I frame the POP using key organizational theories, recent and relevant literature, and a PESTE analysis, comprising political, economic, social, technological, and ecological factors. Finally, I scrutinize internal and external data, or the lack thereof.

In the second half of the chapter, I address emerging questions regarding possible factors that may influence or contribute to the problem, and what challenges may develop. I articulate the gap between the desired organizational state and the current organizational state, outline the vision for change, and illustrate how the desired state will improve the situation for the organization and the greater educational community. I identify priorities for change while seeking a balance between organizational interests and stakeholder concerns. The drivers of change are considered, and the collaborative relationship between the broader community and the organization are described through a macro/meso/micro analysis. In the final section of the chapter, I cover the readiness for change and address internal and external competing factors.

Organizational Context

The focus of this OIP is APCS, an anonymized urban public charter school in Alberta,

Canada. In order to understand the context of the school, it is also important to grasp the social,

economic, and political history behind the public charter school movement in Alberta. The

development of charter schools suggests that Alberta was willing to change and take risks in

order to improve.

In 1994, Alberta legislation allowed for the creation of a maximum of 15 innovative

public charter schools to enhance educational choice and to increase student achievement in the

Alberta public school system. Begun as an experiment, the public charter schools of Alberta are

governed by a series of strict regulations to ensure accountability (The Association of Alberta

Public Charter Schools, 2016). For example, an Alberta public charter school must offer a

program not currently offered by the local public school board. It must be operated by a

nonprofit organization, charge no tuition, and have no religious affiliation. It must employ

Alberta certified teachers and offer curriculum approved by Alberta Education. It also must

undergo a rigorous evaluation process, which, if favourable, may result in renewal of the charter

for up to a 15-year term. The charter school movement in Alberta is an indication that the

government was "advocating for a system-wide commitment to educational innovation and risk"

(Hargreaves & Shirley, 2012, p. 109).

Founded in the late 1990s, APCS has grown from one small campus of just over 200 K–8

students, to a K–12 institution with five campuses, over 3,000 students, and more than 12,000 on

the waiting list. Over time, its student demographic has evolved to become largely first- or

second-generation Canadian. APCS's 2016 budget report describes a socially and culturally

diverse student population. For example, 45.6% of APCS students' primary spoken language is

one other than English, with no fewer than 32 primary languages being spoken system-wide

(APCS Board of Directors, 2016). Important campus communications may be distributed in

Punjabi, Urdu, and Spanish. Translators are available for high school parent teacher conferences

in French, Spanish, Urdu, Punjabi, Guajarati, Kachi, Russian, Hindi, Cantonese, Mandarin, and

Greek.

Vision, Mission, and Values

APCS has a vision, mission, and values that are clearly described in its literature and

reflected in its practice. The school's mission is focused on achieving academic excellence,

developing positive character virtues in our students, nurturing parental partnership, and

fostering staff and student leadership. To cultivate character in our students and strive for

distinction in student achievement, APCS developed and employs a unique teaching model. This

model is "characterized by a safe and caring environment, high expectations for all, and frequent

monitoring of student progress that maximizes learning opportunities for all students" (APCS,

2018b, p. 1) and was developed by staff and administrators (see Figure 1). Four primary layers

are found in this distinct teaching model: planning and design, environment, feedback, and

intentional partnership. APCS also has a formally taught and locally developed K–12 character

education curriculum. Infused in this curriculum are the core character virtues of respect,

responsibility, integrity, self-discipline, and compassion (APCS, 2018a).
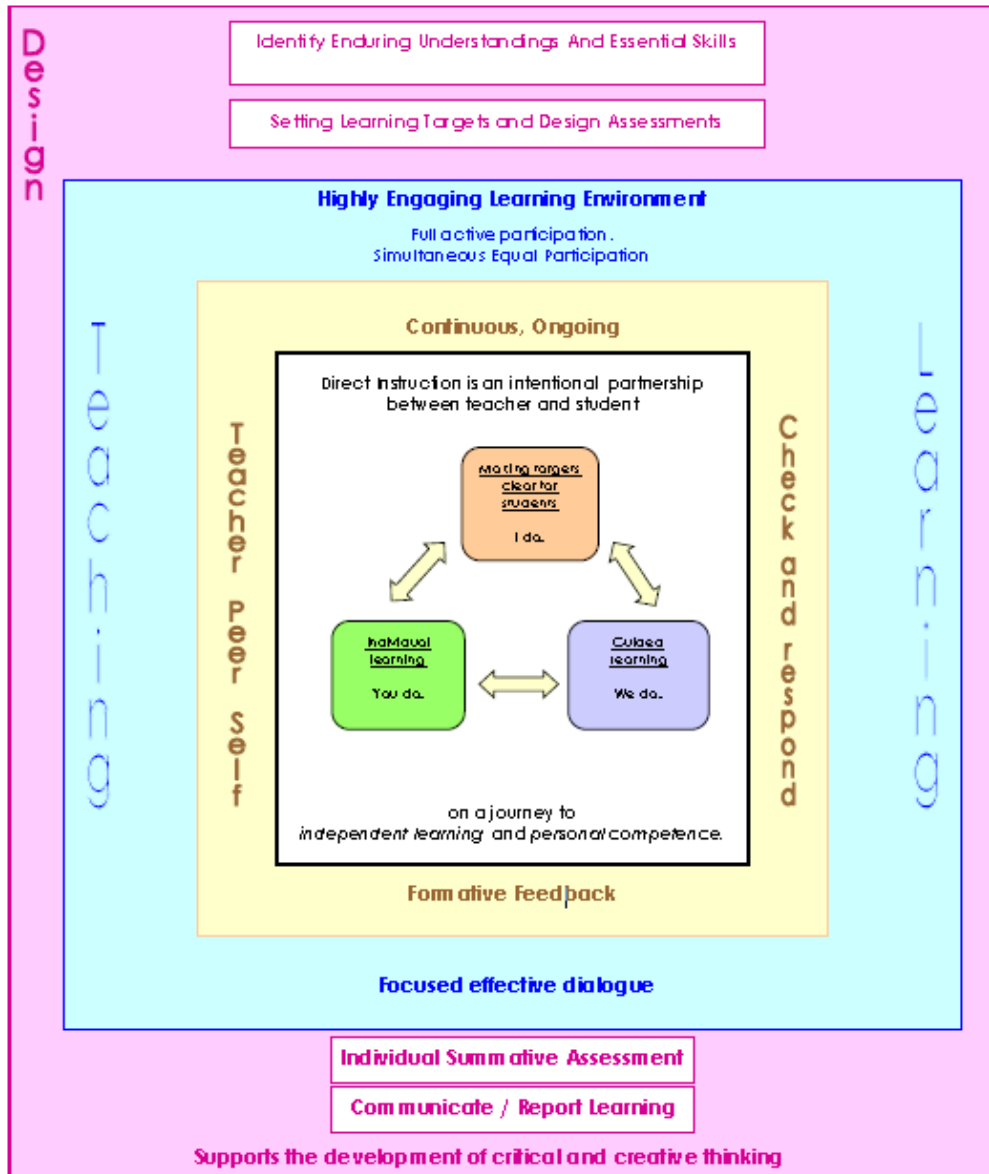
Figure 1. Direct instruction teaching and learning framework.

Reproduced from *Our framework for teaching and learning*, by Aspiring Public Charter School,

2018b, Retrieved from [Retrieval link not included to protect the confidentiality of the

participating organization]. Copyright [Copyright not included to protect the confidentiality of

the participating organization].

Alberta Education (2005) has a suggested and approved character and citizenship

education program. However, it is not intentionally taught, but is "woven throughout the school

day" (Alberta Education, 2005, p. 2). Throughout a student's academic career at APCS, he or she will be deliberately taught about, and shown how to apply, these virtues in day-to-day situations—within the classroom, on the bus, on the playground, within the home environment, and throughout the disciplinary process. Once in high school, students are taught this character curriculum through four separate compulsory leadership courses from Grades 9–12. Several of the content areas of the Grade 9–12 leadership curriculum are conflict management, digital citizenship, service learning, leading themselves and a team, community contribution, and embracing differences.

Even with its language barriers and cultural differences, APCS academic achievement is apparent. For example, the school maintains a three-year graduation rate of more than 94%, with over 87% of students being accepted to a post-secondary institution prior to graduation. Perhaps one of the greatest indicators of APCS's level of academic achievement is its constant upward movement in the annual Fraser Institute Report Card on School Performance. In 2006, after its first graduating class, APCS high school was ranked below the 82nd percentile of all Alberta high schools (Cowley & Easton, 2006). In 2018, APCS High School was ranked in the 3rd percentile (Cowley & Easton, 2018).

Leadership Structures, Approaches, and Practices

Leadership levels and structures. The APCS board of directors is democratically elected, typically from our community of parents; however, community members at large are permitted to run for a limited number of positions. The primary obligation of the board of directors is to preserve and enhance the charter (APCS Board of Directors, 2017a) and to hire the superintendent. The board of directors also contributes to the development of the organization's

strategic direction, vision, and mission. The current board completes these tasks while

considering and consulting the appropriate stakeholders.

The executive leadership team at the central office consists of the superintendent/chief

executive officer (CEO), the assistant superintendent/chief operating officer (COO), the chief

financial officer (CFO), the executive assistant to the superintendent, the director of facilities,

director of technology, the coordinator of instruction, and the coordinator of school services.

There is also an educational leadership team that includes only the CEO, COO, coordinator of

instruction, and coordinator of school services. Separating the executive team from the

educational leadership team maintains a clear distinction between leading the organization and

leading the learning and professional development at APCS.

The administrative council consists of all campus principal educators and associate

principals as well as the executive leadership team. This team meets once a month to discuss and

debate issues and events that pertain to multiple campuses or the entire APCS system. Members

of the council also lead the numerous committees responsible for new initiatives and participate

in system-wide professional leadership development, in addition to any professional

development in which campus staff participate.

The campus staff assists the principal educator and associate principals in the leadership

of daily operations, including student and professional learning, at the campus level. Leadership

roles at the campus level can be filled by any staff member, not just teaching or instructional

staff. For example, our administrative assistants spearhead initiatives, lead field trips, and coach

athletics; our literacy assistants will at times lead professional development; and our custodian

updates our staff on occupational health and safety. It is important to understand that the

embedded expectations of distributed leadership at APCS are foundational to the success of any change process at APCS.

      Numerical and holistic distributed leadership. Within the structure described above is an entrenched expectation of both numerical and holistic distributed leadership (Gronn, 2002) where both communalism and independence work in tandem (Gronn, 2016) to create a model in which complex collaboration can thrive. The leadership is distributed numerically by allowing all those who wish to lead an opportunity to do so within their own agency, which tends to be expanded due to the holistic nature of the distributed leadership at APCS. For example, parents are expected to lead their children in their learning through constant communication and partnership with their child's teachers and campus administration, as well as through official avenues such as school council, which may be common practice within a highly efficient and effective high school environment (Shannon & Bylsma, 2007). However, APCS may stray from the norm in that parents are also invited to appear on interview panels for central office positions, principal educators, and associate principal positions. The concept of stakeholder involvement within the human resources decision-making process is an example of the extent to which APCS numerically distributes its leadership practices. Parents and other stakeholders are also involved in conversations on strategic planning, vision and mission building, uniform policy, calendar planning, and other broad view decision-making processes in which, in some other school jurisdictions, such stakeholders may not be consulted.

      APCS has also established leadership practices and approaches that reflect a holistic distributed leadership perspective. According to Gronn (2002), holistic distributed leadership manifests itself in three patterns. First, valuable complex collaboration emerges spontaneously. Second, effective interpersonal working relationships are developed due to the close nature of the

work being completed. Third, distributed leadership is deliberately regularized through structures and practices. With all three of these patterns prevalent within APCS, distributed leadership has become an expectation. Should formal leaders in positions of authority veer away from a distributed leadership model while developing policy, exploring a new initiative, or generating a change in organizational direction, they may well experience formidable resistance from those stakeholders who typically would be consulted.

Leading within in an organization such as this has had a profound effect on my own individual leadership practices and approaches. Understanding the expectation of a distributed leadership practice has forced me to analyze my own decision-making process to allow for input from various levels of leadership and stakeholders within our organization. Taking into consideration and consulting with numerous levels of stakeholders, including students, is time consuming, and at times frustrating. Completing the consultation process can also drastically change the direction of any proposed initiative or change. Even with these barriers, the distributed leadership model at APCS has developed my patience and tolerance for the ideas of others. It has allowed me to put followers first, a key aspect of servant leadership (Greenleaf, 1977; Liden, Panaccio, Hu, Mauser, & Wayne, 2014), while developing my own followership through the consideration of all levels of our organizational leadership.

Leadership Position Statement: Agency, Power, and Personal Voice

In my role as an associate principal at APCS, I am offered a significant amount of agency due to the nature of the leadership model in our organization. An organization such as ours, with its authentic and servant-based distributed leadership structures (George, 2003; Greenleaf, 1977; Gronn, 2016), allows a great deal of power and personal voice to those in the administrative and campus leadership positions. As an associate principal, I can influence organizational change at

the micro and meso levels through my formal position. At the campus level, my agency, power,

and personal voice have been established through collaboration concerning reforms as leader,

liaison, and facilitator of central office and local campus initiatives, where complex collaboration

with teams and committees involving various stakeholders make changes within our campus.

The changes led have been both directed from central office and created within the campus itself

to achieve localized organizational change. Through distributed leadership (Gronn, 2016), this

agency can extend to other campuses by means of multi-campus committees that pursue the goal

of common and consistent teaching and learning reforms. Within our organization, there is an

expectation to consult and include staff from other campuses when initiatives may affect their

academic programs, facility operations, or structures.

The intimate nature of the relationships developed with the central office leadership

allows personal voice to also be prevalent at the macro level as a representative of the

organization beyond the internal workings of APCS. No formal leadership position is needed for

this agency to be prevalent. It is not uncommon for campus administrators to engage in

individual or group conversations with the superintendent, assistant superintendent, or chief

financial officer in regard to system decisions, both internally and externally. These

conversations can be formal, during administrative council or committee meetings, or informal,

during campus visits, central office conversations, or even around tables at professional

development events. This agency is not limited to school administrators—teachers and office

staff are frequently welcomed in these informal and formal conversations where multiple levels

of leadership are present. As a past teacher and athletic director at APCS, I experienced my

personal voice being heard and considered by past superintendents and central office staff prior

to being granted a formal leadership position. A personal voice from all levels is welcomed and respected at APCS.

Leadership Lens Statement

The current theoretical leadership lens at APCS could aptly be described as a distributed leadership model (Gronn, 2016) based on authentic leadership (George, 2003) and servant leadership (Greenleaf, 1977). This lens corresponds directly with my own, allowing for a greater voice and efficacy within the APCS context. Understanding that these models cannot stand alone, but are used efficiently in concert, is a foundational concept needed to understand the leadership lens of this organization. Described below, the aspects of all three models intertwine to provide a sound and complex framework that has been developed through organic and deliberate processes over the past two decades at APCS.

Authentic leadership. The authentic leadership lens can be expanded beyond the early work of George (2003) to include the theoretical work of Avolio et al. (2009) and Duncan, Ecung, Gergan, and Green (2017) regarding the self-awareness, balanced processing, internal moral perspective, and relational transparency of APCS's authentic leadership model. The research addresses the four aspects of authentic leadership within the leadership framework of APCS. Understanding self-awareness is primary to the authentic leadership model, allowing leaders to recognize their own strengths and weaknesses and how they perceive the world and its issues (Avolio et al., 2009).

Duncan et al. (2017) furthered the principle of self-awareness by including the leaders' awareness of how the world perceives them and how they influence others. Balanced processing refers to the leaders' ability to analyze relevant data and consult with other stakeholders who possess a view that challenges their own prior to a decision being made (Avolio et al., 2009;

Duncan et al., 2017). An internal moral perspective, specifically one that aligns with that of the

organization, provides a personal and internal guide of moral and ethical standards that competes

with the external pressures during decision-making processes. Pressure from the organization,

external groups, and society itself need to be considered and resisted according to the leaders'

own internal moral perspective (Avolio et al. 2009; Duncan et al., 2017). The final aspect of the

authentic leadership model used at APCS is that of relational transparency. Foundational to this

model is the value of leaders who authentically express and present their true selves to the

organization. Authentic leaders share their true feelings and perspectives, and do not distort or

misrepresent their emotions, viewpoints, or appropriate information when making decisions or

dealing with crisis (Avolio et al., 2009; Duncan et al., 2017).

　　　　Servant leadership. Building upon the original work of Greenleaf (1977), Liden et al.

(2008) developed nine dimensions of servant leadership that can be observed within the

leadership model at APCS: emotional healing, creating value for the community, conceptual

skills, empowering, helping subordinates grow and succeed, putting subordinates first, behaving

ethically, relationships, and servanthood. Emotional healing refers to the leader acting with

sensitivity to the concerns of others. A servant leader also creates value for the community by

showing a deliberate attempt to improve the community in all decisions. Empowering is

displayed by assisting others, specifically immediate followers, in the act of identifying and

solving organizational problems and determining when and how tasks are completed. Helping

subordinates grow and succeed, as well as putting subordinates first, denotes a genuine concern

for the work of subordinates by supporting and prioritizing their growth and development with

mentorship and resources. Overlapping with authentic leadership's internal moral perspective,

servant leadership promotes a leader's capacity to behave ethically, and interact transparently,

especially with immediate followers. Honouring the original work of Greenleaf, servanthood is a foundational dimension. It refers to "a way of being marked by one's self-categorization and desire to be characterized by others as someone who serves others first, even when self-sacrifice is required" (Liden et al., 2008. p. 162).

      Distributed leadership. The theoretical umbrella that shades servant and authentic leadership is that of distributed leadership theory (Gronn, 2016). All aspects of authentic and servant leadership fall within the model of distributed leadership practiced by APCS. Both numerically, by the literal division of the roles and responsibilities in the decision-making processes, and holistically, through the complex collaboration, development of effective interpersonal working relationships, and structures and practices that regularise distributed leadership (Gronn, 2016), the servant/authentic/distributed leadership model of APCS is strengthened by the triad of these related but diverse leadership models. As a member of this organization who has held multiple leadership positions, I can attest to the congruency of the experiential and the theoretical within this organizational leadership model.

Leadership Problem of Practice

      The POP that I address is a lack of global competencies taught, and international context provided, at APCS. APCS has recently established global experience and competencies as one of two key priorities within its new strategic plan (APCS Board of Directors, 2017b). Although APCS is a well-established institution of academic excellence, character, and leadership, a missing element of global knowledge, skills, and attitudes may be needed as we lead our staff and students into the unknown future. For example, there is currently no deliberate teaching of global competencies at APCS, even though APCS students need to be well equipped to handle the ever-changing international landscape of their post-secondary lives.

As previously stated, APCS is a high-achieving public school with graduation and transition rates, and provincial standardized test results, equivalent to elite private schools (Cowley & Easton, 2018). These metrics provide a clear picture of the achievement of our students but do not adequately describe the current organizational state. APCS is a successful and thriving urban public school with foci on character education, leadership, academic excellence, and parental partnership. The school's success can be attributed to numerous programs and factors: a distinct teaching and learning framework, a system-wide coaching model, a locally developed K–12 character curriculum, the deliberate engagement of staff on all significant organizational programs and interventions, a clear focus on being one school across numerous campuses, continued focus on partnership with parents and the local community, and intentional transition programs between elementary and middle school, and middle and high school. APCS has the opportunity to transition from its current organizational state of an effective and high performing public school (Shannon & Bylsma, 2007) to the desired organizational state of being an effective and high performing international public school. The desired future organizational state would be to internationalize APCS and create a program that would provide an opportunity for students to graduate with the skills, knowledge, and understanding that would allow them to compete in a global market and become globally competent change agents, without compromising any of our current academic, character, or leadership-based student outcomes.

Framing the Problem of Practice: Why Change?

Key organizational frameworks. Organizational change is complex. To understand and facilitate the progress from the current to the desired organizational state at APCS, I employ two change models to frame this OIP. The first is Cawsey et al.'s (2016) four stages of the change

path, and the second is Bolman and Deal's (2017) four frames of leadership. These two frameworks are combined to form a conceptual change model that will allow flexibility and efficiency by analyzing each of the four stages of the change path (Cawsey et al., 2016) through the lenses of Bolman and Deal's four frames of leadership.

The change path (Cawsey et al., 2016) provides a model which is linear enough to provide the structure needed for change at APCS, but flexible in the sense that there may be overlap within the progression from stage to stage. This model describes the change process in four stages: awakening, mobilization, acceleration, and institutionalization. *Awakening* describes the stage in which the organization realizes and/or establishes the need and nature of the change, and this change is communicated to stakeholders. *Mobilization* can be described as the determining of the distance between the current and the desired organizational state. During the *acceleration* stage, plans will be developed as to how the organization will move from the current to the desired state. One of the critical components of this stage is action planning and implementation. *Institutionalization* is the final stage of the change path model. Within this stage, the desired state is achieved and is made fundamental to the organization. It is also within this stage that the organizational change will be measured, evaluated, and monitored (Cawsey et al., 2016).

Viewing the change path (Cawsey et al., 2106) through the lens of the four frames of Bolman and Deal (2017) provides a stable platform on which APCS can analyze the factors that shape the progress of the desired change. It is wise to have common understandings and language to rely on when facilitating change in an organization, and the four frames of leadership provides this foundation to the leadership team at APCS. The first of the four frames, the *structural* frame, considers those factors that are controlled by the organization. Within this

frame are the roles, goals, strategies, policies, technology, etc., that APCS can use within its environment to travel through the stages of the change path. The second frame is the *human resource* frame. It considers how APCS can empower stakeholders with the knowledge and skills needed to move the organization to the desired state. This frame also considers the needs of those impacted, and maintains and nurtures the social relationships needed to move the change forward while simultaneously and genuinely caring for everyone's well-being (Bolman & Deal, 2017). The *political* frame takes into consideration the possible political conflict and competition that may occur during each stage of the change path. The political frame can be used to establish the agenda, while considering the advocacy and power needed to progress efficiently to the desired state. The final frame is the *symbolic* frame. This frame considers the spiritual needs of the organization and its stakeholders. It is within this frame that faith and meaning are created within the change. This frame allows for hope in the change that is being implemented; it considers the current ethos while delicately transitioning to the new culture of the desired state (Bolman & Deal, 2017).

Combining both the change path (Cawsey et al., 2016) and the four frames (Bolman & Deal, 2017) comes from a deep understanding of the need to both be linear (to have a format or structure to rely on) and to create the means to debate and discuss multiple perspectives within that structure. Within APCS, the need for both these characteristics of change has been made paramount during the change processes of the past. For example, the administrative council has a working knowledge of the four frames, and the established language of that theory, which will allow for efficient communication and deep conversation while at different stages of the change process. The amalgamation of these theories fits well within the current structures of APCS and provides a conceptual foundation to the desired change.

  Recent literature on the topic. A key issue to be framed within the POP is

understanding and defining what is meant by "global competency" within the context of APCS.

Defining global competency has been one of the primary barriers to its understanding, teaching,

and measurement (Deardorff, 2004, 2006, 2011, 2015; Hunter, White, & Godbey, 2006;

Morozova, 2016). Several terms have been used to refer to what could be classified as global

competencies: globalization, global education, global leadership, global citizenship,

cultural/cross-cultural awareness, cultural diversity, cultural intelligence, intercultural

communication, intercultural competencies, intercultural sensitivity, intercultural maturity,

cultural storytelling, cosmopolitanism, and worldview (Morozova, 2016). Deardorff (2004)

concluded that intercultural experts and higher education administrators preferred a broader

definition of global competence; however, it was noted that one of the primary criticisms of the

definitions was that "they are either too general or provide a disjointed list of attributes" (p. 191).

Within the context of APCS, the pyramid model of intercultural competence (see Figure 2),

developed by Deardorff (2006), is the suggested framework for teaching and learning in regard

to global competencies for this OIP.

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┌──────────────────────────────────────────────────────┐
│ DESIRED EXTERNAL OUTCOME:                              │
│ Behaving and communicating effectively and            │
│ appropriately (based on one's intercultural            │
│ knowledge, skills, and attitudes) to achieve one's     │
│ goals to some degree                                   │
└──────────────────────────────────────────────────────┘
┌──────────────────────────────────────────────────────────┐
│ DESIRED INTERNAL OUTCOME:                                 │
│ Informed frame of reference/filter shift:                 │
│ Adaptability (to different communication styles & behaviors;│
│    adjustment to new cultural environments);              │
│ Flexibility (selecting and using appropriate communication │
│    styles and behaviors; cognitive flexibility);          │
│ Ethnorelative view;                                       │
│ Empathy                                                   │
└──────────────────────────────────────────────────────────┘
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Knowledge & Comprehension:
Cultural self-awareness;
Deep understanding and knowledge of
    culture (including contexts, role and
    impact of culture & others' world
    views);
Culture-specific information;
Sociolinguistic awareness

Skills:
To listen, observe, and interpret
To analyze, evaluate, and relate

Requisite Attitudes:
Respect (valuing other cultures, cultural diversity)
Openness (to intercultural learning and to people from other cultures, withholding judgment)
Curiosity and discovery (tolerating ambiguity and uncertainty)

- *Move from personal level (attitude) to interpersonal/interactive level (outcomes)*
- *Degree of intercultural competence depends on acquired degree of underlying elements*

Figure 2. Pyramid model of intercultural competence.

Reproduced from "Identification and Assessment of Intercultural Competence as a Student

Outcome of Internationalization," by D. K. Deardorff, 2006, *Journal of Studies in International*

Education, *19*(3), 254. Copyright 2006 by Sage Journals.

Deardorff's (2004, 2006) work establishes a clear, yet flexible, model derived from an in-

depth analysis of previous research on global competencies. The allowance within the model for

growth from personal attitudes to interpersonal/interactive outcomes fits contextually, as students

will develop their global competencies over their years with APCS. It will provide the

foundation for APCS's attempt to create a program that provides students with the opportunity to

become globally competent during their K–12 matriculation. Although Deardorff (2006) used the term *intercultural competency* (p. 3), APCS has adopted the term *global competency* as it more appropriately refers to the international elements of the organizational change and aligns better with the more current research by the Organisation for Economic Co-operation and Development (OECD; 2018), depicted in Figure 3.
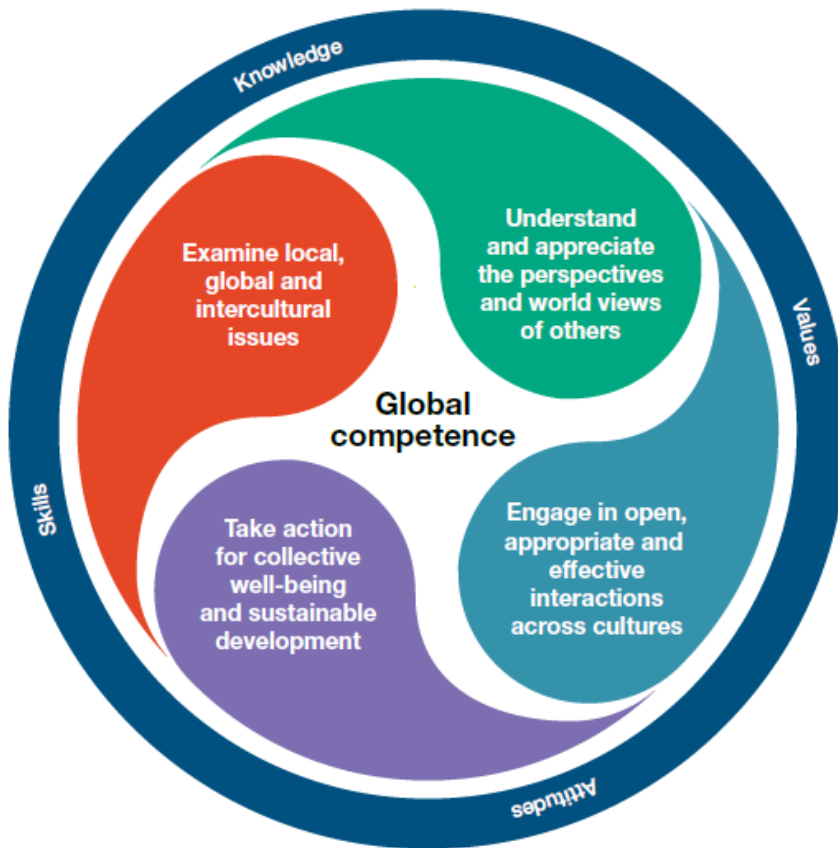
Figure 3. The dimensions of global competence.

Reproduced from *Preparing Our Youth for an Inclusive and Sustainable World: The OECD PISA Global Competence Framework*, by the Organisation for Economic Co-operation and Development, 2018, p. 11. Copyright 2018 by the Organisation for Economic Co-operation and Development.

The matter of defining and teaching global competencies is complex. The OECD's (2018) dimensions of global competence model (see Figure 3) and the more linear Deardorff (2006) model (see Figure 2) provide two frameworks that allow for both the structure needed to provide deliberate instruction progressively over the long matriculation from K–12 (Deardorff (2006), and the profile of skills, attitudes, values, and knowledge (OECD, 2018) that would be expected from a graduate of the APCS global competence program.

**PESTE analysis.** Understanding the external factors that may affect the efficiency and success of this OIP could be an effective way to avoid barriers and pitfalls. One method of analyzing these external factors is through a PESTE analysis of the organizational context. PESTE is an acronym for the political, economic, social, technological, and ecological (Cawsey et al., 2016) factors within a specific context. The analysis of each of these factors allows for increased foresight and proactive planning that may minimize barrier, or reveal issues that may obstruct progress.

Political. External political implications for Alberta public charter schools can be complicated. However, the external political pressures specific to APCS are not related to this OIP. The majority of public school systems in Alberta have an international student exchange program and, within that context, have, to some extent, knowledge and understanding of global competencies. APCS will be a pioneer by establishing a program that deliberately and specifically attempts to graduate students who are globally competent. External political pressure to adhere to our charter is constant, but not unwelcome. Understanding that this accountability provides focus on our founding pillars of character education, leadership, and academic excellence, the progression to establishing APCS as a centre for global competency aligns with our pillars in a manner to which it would be difficult to object.

Economic. Establishing a focus on global competency at APCS has both economic advantages and barriers. As a part of the internationalization of APCS, one element of the proposed changes will be the establishment of an incoming international student program. The average international student pays $12,154 in study-related fees. Tuition, paid to the school, is 91% of those fees (Alberta Education, 2017). There is an economic advantage to welcoming international students to APCS; however, just having international students will not meet the school's desired organizational state. There are economic costs associated with establishing new programs: professional development, guest teachers, possible consultancy costs, human resources and capital devoted to the transition, etc. The influx of international students, and the attendant payment of fees, will offset this cost. There may also be the possibility of connecting with post-secondary institutions through grants and research partnerships that may alleviate some financial burden associated with program development. Joint ventures with private enterprise, stemming from the desire for more globally competent employees in the private sector (Hunter et al., 2006), may also provide economic benefits.

Social. The pursuit of creating a program that produces graduates who are globally competent has the potential to improve the social status of APCS. Although APCS is already known for high academic achievement, a new focus on global competency has the potential to improve this reputation and, in turn, enhance the opportunities available to its students. With an already clear focus on leadership and character, an additional emphasis on international proficiencies would allow APCS to market its students as globally competent leaders with social conscience—global citizens with the desire to be change agents, and the knowledge and ability to do so in a multicultural environment. However, increased social status may also have its drawbacks. APCS, due mostly to its high academic results and its positioning as a school of

choice, is often perceived as being elite. The success of this OIP may be perceived by critics as just an increased level of elitism.

Technological. Although at times contentious in the educational landscape, technology must be attentively considered due to the global nature of communication and media. Technology may make it possible for APCS students to gain knowledge and understanding of global competencies without leaving the campus. Soria and Troisi (2014) argued that it is not necessary to travel internationally to become globally competent, and technology would be a part of this type of programming. It may be argued that in order for technology to be leveraged for the acquisition of global competencies, there is an economic cost associated with providing technology for all. APCS currently has access to sufficient technology for this requirement not to be an issue, and with the current trend of students having access to smart phones and tablets with social media and internet access, it is confidently anticipated that all students will have access to the technology they require.

Ecological. There should be no increased negative ecological effect due to APCS's focus on global competencies. Beyond that, Deardorff's (2006) pyramid model of intercultural competence and the OECD's (2018) dimensions of global competence focus on a deep understanding of culture and its influence. One can expect that a globally competent graduate, imbued with the qualities of empathy and adaptability (internal outcomes) and the capacity for improved communication (external outcome), would make a positive impact on the global ecological footprint.

Relevant Internal Data

The relevant internal data concerning APCS's move to the desired organizational state of being an effective and high performing international public school, where global competencies

are taught and international context is provided, have yet to be collected. Within the previous

section on historical context, statistics and data were shared that establish APCS as a highly

effective academic institution with a leadership and character focus. No current internal data

have established a need to include global competencies and international context. Such data need

to be collected, a process which is already underway. In the spring of 2018, APCS was approved

for a research grant to study the "Demographic Variables Impacting the Global Competence

Knowledge, Skills, Attitudes and Experiences of Albertan K–12 High School Students and Staff"

(APCS, 2018b, p. 1) to answer the following questions:

1. Do students' levels of global competence, as measured on Global Competence

   Associates' (n.d.) Global Competence Aptitude Assessment (GCAA) student instrument,

   differ in terms of the following variables: gender, nationality, academic level (age), time

   living abroad, or years learning in an ethnically diverse setting?

2. Do teachers' levels of global competence, as measured on the GCAA (Global

   Competence Associates, n.d.) professional instrument, differ in terms of the following

   variables: gender, nationality, age, level of education, time living abroad, teaching

   experience, or time teaching in an ethnically diverse setting?

3. Is there a correlation between the overall global competence of the students compared to

   that of the staff, as measured by overall scores on the GCAA (Global Competence

   Associates, n.d.)?

4. To what extent do the students involved feel that their high school program has prepared

   them to be globally competent?

   The data collected from this research grant may be used to create a starting point for the

changes needed to provide a program for the teaching of global competency and international

context. These data may also be compared to internal surveys that assess the safe and caring

learning environment, critical thinking, and engagement. This information is gathered from the

student body on yearly basis and is currently undergoing restructuring in order to collect data on

the level of global competency already present in our students between Grades 9 and 12. These

two sources of data will allow us not only to view and compare student results, but also to

analyze data regarding staff. Given that the student surveys can be correlated by teacher, we

would be able to see if certain teachers are currently fostering a more globally competent

classroom than others, and if that outcome correlates with the research grant results on that

teacher's personal level of global competence. We also may be able to see if global competency

is occurring more organically in certain subject areas, grades, or by achievement level as data

can be organized by these categories as well.

Relevant External Data

The primary motivator for bridging the gap from the current to the desired organizational

state is external data. The Council of Ministers of Education Canada (2018) have established six

pan-Canadian global competencies deemed necessary to prepare students for the complexities of

the future:

1. critical thinking and problem-solving;

2. innovation, creativity, and entrepreneurship;

3. learning to learn/self-awareness and self-direction;

4. collaboration;

5. communication; and

6. global citizenship and sustainability.

These pan-Canadian global competencies (Council of Ministers of Education Canada, 2018) reflect the international direction of organizations such as the OECD and The United Nations Education, Scientific and Cultural Organization (UNESCO). The Programme for International Student Assessment (PISA), within the testing regime of the OECD, has developed a model to assess global competencies. Students taking part in the 2018 PISA, including students from Alberta, will be assessed on global competencies for the first time. UNESCO (2013) has also developed a conceptual and operational framework for intercultural competencies which explains its plan for clarifying, teaching, promoting, enacting, and supporting these competencies. Using a complex visual termed the Intercultural Competence Tree (see Figure 4), UNESCO's model is meant to "offer a symbolic view of intercultural competences as an organic system of concepts" (2013, p. 22). Although this model provides a detailed depiction of global competencies, its complexities and exhaustive nature may not be as effective as the combination of Deardorff's (2006) and the OECD's (2018) models, which APCS may use as the foundation for the development of its global competencies and international context.

One important element of external data on global competencies is the lack of research completed in the field of global competencies concerning the primary to secondary student demographic. The search for data and models of global competencies revealed that the majority of research has been completed within post-secondary institutions. APCS hopes to be a pioneer in the teaching and assessing of global competencies within the K–12 demographic. Solving the POP and evolving into a system that provides a program where international and global competency are explicit components of the mission will be a clear indication of a successful OIP.

The Intercultural Competences Tree, a visual conceptualization

Roots: Culture (Identity, Values, Attitudes, Beliefs, etc.) and Communication (Language, Dialogue, Nonverbal behavior, etc.)
Trunk: Cultural Diversity, Human Rights, Intercultural Dialogue
Branches: Operational steps (Clarifying, Teaching, Promoting, Supporting and Enacting Intercultural Competences)
Leaves: Intercultural Responsibility, Intercultural Literacy, Resilience, Cultural Shifting, Intercultural Citizenship, Conviviality, Reflexivity, Creativity, Liquidity, Contextualization Cues, Transvaluation, Ubuntu, Semantic Availability, Warm Ideas, Skills, Uchi Soto, Multilingualism, Disposition, Emotions, Knowledge, Translation, Intercultural Communicative Competence. Some of the leaves have been left free so that this Tree which is very much alive, can be complemented upon the rich diversity of contexts available worldwide.

Figure 4. Intercultural competence tree.

Reproduced from *Intercultural Competencies: Conceptual and Operational Framework*, by the United Nations Education, Scientific and Cultural Organization, 2013, p. 23. Copyright 2013 by the United Nations.

Guiding Questions and Challenges

Three guiding questions have emerged relative to the implementation of this OIP. First, how will APCS provide the learning environment where this global interaction may exist? Morozova (2016) concluded that "global competency begins with an authentic, and very personal, interaction with, and understanding of, a multitude of countries and cultures" (p. 23). The difficulty providing this environment may be financial in that our public school does not have the funding to allow for international travel or experience. However, Soria and Troisi (2014) have maintained that becoming globally competent does not require international travel. APCS is lucky to have a culturally diverse student population, which will have to be leveraged to provide an international context locally.

Second, how, and to what extent, will the strategic internationalization of the APCS system contribute to students' acquisition of the intercultural or global competencies needed to succeed in the new global future? This is a more encompassing question and one that will need to be answered if the school is to pursue the desired organizational state. If this organizational change is not connected to student learning or achievement, then it will likely have very little support. It is not uncommon for initiatives to fail or be abandoned due to a lack of evidence as to how it is going to assist students in the future. The APCS board of directors (2017b) has included the goal of a global experience and context as a strategic direction; however, in order for this goal to be achieved, stakeholders will need to be convinced that this direction is in the best interests of students. Administrators, teachers, parents, and students will need to see the value in becoming internationalized.

Finally, what considerations need to be taken when dealing with culture and ethnicity? Foster and Lumby (2011) cautioned that if various cultures are being explored, then it is likely

that the process of exploration will reflect the perspective of the interrogator. Those who have

been diminished or marginalized may be sensitive due to being exploited by dominant cultures in

the past, and any change process should not be considered without the careful contemplation of

the cultures currently present in the organization. With such a culturally diverse population, 32

primary languages spoken (APCS Board of Directors, 2016) for example, APCS will have a

large number of cultures to consider.

Leadership-Focused Vision for Change

       Identifying the gap. Perhaps the most efficient way to articulate the gap between the

present and future state is to look at the goals and outcomes we have for our students. In previous

sections of this OIP, the evidence describes APCS as an academically successful educational

institution. Data such as graduation and transition rates and independent school rankings are used

to quantify our students' achievements. Compulsory leadership training displays our

commitment to preparing our students to lead, not only in our schools, but in the greater

community and beyond the years they spend at APCS. Our K–12 character curriculum is both

explicitly taught and imbued within our day-to-day conversations around everything from

student discipline to academic integrity. APCS has robust data from internal and external sources

on several indicators that show a high level of stakeholder satisfaction in regard to overall school

efficiency. In order to achieve the above successes, APCS has constantly sought to improve. To

support the growing interest in preparing our graduates for a more global future, our board of

directors has placed an emphasis in our new strategic planning document to equip our students to

lead beyond the goals of our current program. The desired future organizational state is one in

which all APCS graduates would have access to an education that would prepare them to thrive

and lead in a global capacity.

Global competency education. To provide clarity and consistency, it will be important for all stakeholders to define global competency and agree on the model APCS will be using. The pyramid model of intercultural competence (Deardorff, 2006) and the dimensions of global competence (OECD, 2018), if adopted, will need to be deeply understood by staff in order for the global competencies to be taught. Professional development will need to be provided for training in the competencies themselves, and in how they will be implemented and communicated at APCS. As well, teachers may need to be provided time to facilitate workshops or information sessions for parents to share the language and understanding of global competence at APCS.

Transparency. Stakeholders may need to be provided with the rationale behind our global competence focus, and how it came to be a part of the APCS strategic plan. For example, adherence to key principles of servant and authentic leadership would allow the practice of transparency to create the trust needed when leading change. Specifically, conceptualizing, putting followers first, and empowering from the servant leadership theory (Greenleaf, 1977; Liden et al., 2008), and balanced processing and relational transparency from authentic leadership theory (Avolio et al., 2009; Duncan et al., 2017; George, 2003), would assist in the provision of transparency so that all stakeholders are aware of where APCS is in the change process currently, and what the next steps may be.

Vision and mission adjustment. In order to complete the change process, the vision and mission of APCS may need to be adjusted. According to Cawsey et al. (2016), not including the desired organizational state in the vision and mission documents may be a restraining factor in the change process. In addition to the current attributes of character, leadership, parental partnership, and academic excellence, APCS may need to adjust its vision by adding the element

of global competency. The APCS strategic plan discusses what will be needed in the coming

years to maintain excellence in character education and leadership, and to expand our focus to

include programing that "PREPARES students with the intellectual, social-emotional, ethical,

and global competencies to become FUTURE-READY LOCAL AND GLOBAL CITIZENS and

leaders in an age of accelerations" (APCS Board of Directors, 2017b, p. 4).

      Strategic partnerships. One of the methods identified in the APCS strategic plan to

cultivate global competency is the establishment of intentional partnerships (APCS Board of

Directors, 2017b). Although these connections are not clearly described in the strategic plan, the

use of partnerships within the local and broader community has a clear association with

distributed leadership theory (Gronn, 2000, 2002, 2008, 2016; Harris & Spillane, 2008; Orlina &

Spillane, 2005; Spillane, Diamond, Walker, Halverson, & Jita, 2001). Specifically, complex

collaborations and critical interdependence could be leveraged within the current liaisons, and

the ones yet to be established. APCS has already partnered with two local post-secondary

institutions to receive a research grant to measure and assess the current levels of global

competency in APCS staff and students using the GCAA (Global Competence Associates, n.d.).

There is also the possibility of affiliation with a local regional consortium to develop customized

resources to train APCS staff, and others, in global competencies, and possibly establish a global

competency certification. The APCS board of directors has made it clear that the strategic

relationships established may be an effective tool in bridging the gap between the current and

desired organizational state.

      Change drivers. Understanding the "who" and "what" that drive change is paramount

when considering the organization's need, nature, and readiness for change. This is an integral

aspect of both the awakening and mobilization stages of the change path (Cawsey et al., 2016). It

is also an important consideration within the political and spiritual aspects of Bolman and Deal's

(2017) four frames. Change leaders who do not take into account what drives the change in their

organization put themselves and those they lead at a significant disadvantage. An analysis of the

discourse and factors that drive change at the macro, meso, and micro levels will assist in

understanding what may drive the desired change at APCS.

The desire to be a school that explicitly teaches the skills, knowledge, understanding, and

attitudes needed for our graduates to be globally competent is derived from the discourse at the

macro level. There is a need for globally competent leaders and employees, and those who do not

have the required skills may not be prepared for the markets of the near future (Hunter et al.,

2006). APCS will continue to provide the quality leadership, academic excellence, and character

education it has over the past two decades, while adding the global competencies graduates need

to be internationally employable. Although there is a practical application of global

competencies, there is also an altruistic one. There is hope that a more globally competent

citizenry will create a more culturally tolerant and accepting world. Deardorff's (2006) pyramid

model of intercultural competence describes the globally competent attitudes of respect, open-

mindedness, and curiosity as the keys to withholding judgment, creating value, and building

tolerance for cultural diversity.

Those who drive change can currently be found at all levels of the educational landscape.

Discourse at the meso level is also currently driving change. The APCS Board of Directors

(2017b) has established global competencies and experience as priorities in its current strategic

planning. The administrative council has adopted global competencies as a focus for the next

three years. At the high school campus, the leadership team is considering using Deardorff's

(2006) attitudes of curiosity, respect, and open-mindedness to frame the work with teachers and

students. Global competency is slowly becoming a part of the fabric of APCS, an early indicator

of the institutionalization stage of the change path model (Cawsey et al., 2016).

At the micro level, conversations with students and alumni have been key drivers of

change. I was approached by one alumnus who believed that cultural insensitivity occurring in

our classrooms was damaging the relationships between students and teachers. Recognizing that

healthy student–teacher relationships enhance achievement and learning, we continued our

discourse at a later date, and it became clear that some of our staff may lack cultural

understanding. Perhaps one of the first steps to graduating globally competent students is having

globally competent staff. Discussions around cultural events, religious holidays, a prayer room,

the queer–straight alliance, the music played at dances, translators for parent–teacher/admin

conferences, dress codes on casual days, uniform infractions due to religious wear, perceived

cultural conflict vs. actual cultural conflict, etc., have all led to questions about how we can

respond to these situations in a more cultural appropriate manner.

Organizational Change Readiness

During the awakening, mobilization, and acceleration stages of the change path (Cawsey

et al., 2016), change must be led using tools and practices applicable to the specific context of

APCS. Within Cawsey et al.'s (2016) work is a tool titled a "readiness-for-change questionnaire"

(p. 108; see Appendix A). Working through the questions allows an organization to rate its

readiness for change. This questionnaire is by no means comprehensive; however, it provides a

method for measuring what may be prohibiting or promoting change within a specific

organizational context.

I believe it is within my agency to accurately estimate responses for APCS's readiness for

change. Having spent numerous years within the organization as a teacher of several grades,

athletic director, and associate principal, I have multiple and valued perspectives on the organization. I also have close relationships with administrators and teachers at the primary, middle school, and central office levels. Working through the questionnaire and considering multiple perspectives creates a clearer picture of APCS's readiness for change. The questionnaire is separated into six categories of change readiness: previous change experience, executive support, credible leadership and change champions, openness to change, rewards for change, and measures for change and accountability. There are clear areas where the level of readiness at APCS is high, and others where there will need to be some work done by change agents and champions in order to prepare those who may have doubts concerning the movement to the desired organizational state. The readiness for change questionnaire provides a means of analyzing the current organizational landscape and estimating the level of readiness for change. It also serves as a reminder that change readiness must be intentionally developed in some cases and must align with system goals and structures, so it can be leveraged for improvement and progress.

Areas of readiness. With an estimated score of 28 out of a possible 35 (see Appendix A), it is clear that APCS is an organization that has managed change well in the past and is poised to handle change in the future. In all six categories of change readiness, APCS scores well. Analysis of the questionnaire further provides clear areas of strength in the categories of previous change experience, credible leadership and change champions, and measures for change and accountability. In these three areas, APCS was estimated to have a perfect score. This result does not mean that no work will be done in these areas or that they can be ignored during the change process. It does mean that some areas will need more attention than others.

Areas for development. The advantage gained by using a tool such as the readiness-for-change questionnaire (Cawsey et al., 2016) is that it allows for the finding of small pockets of growth within the context of a strong and effective organization. A closer look at the categories that had the lowest estimated scores reveals a few specific areas where perhaps APCS could intentionally develop a stronger readiness for change. Within the categories of executive support and openness to change are a number of questions that cannot be given a positive response. These areas will need to be addressed to create as smooth a transition as possible to the desired organizational state. Openness to change is the primary category where development is needed. Four specific areas of concern lie within this category: the organization's scanning mechanisms and how those mechanisms are monitored, communication channels, turf protection, and how those not in power may view the change as unnecessary.

Within the current organizational policies, neither scanning nor the monitoring of scanning are described in any formal way. This situation mirrors that of communication channels, which also has no formal documentation when it applies to change. Although both of these actions are currently occurring informally, the creation of an official mechanism or structure (Bolman & Deal, 2017) to scan and communicate the change process may alleviate some of the uncertainty and anxiousness that can occur. Turf protection may be prominent within APCS. When initiatives or reforms have been communicated in the past, some groups at different grade or school levels have held fast to existing programs or methods that needed to be changed. Turf protection is a common resistance to change in the context of APCS and needs to be viewed as both a challenge and an opportunity (Cawsey et al., 2016). Those who resist change in a healthy organization are showing ownership and loyalty to past initiatives and programs that they believe are still effective, and they may not want to release their grasp on them. People who

resist in highly effective organizations are not just being obstinate; rather, they may have legitimate concerns that need to be addressed. Change leaders will need to recognize, understand, and work to address these issues.

Liden et al.'s (2014) servant leadership model may assist the leaders within APCS when dealing with change resisters. The servant leader attributes of helping followers grow and putting followers first are examples of how a change leader could use servant leadership theory to actively work to overcome this resistance. There has also been a common resistance that manifests in the opinion that change is unneeded (specifically from those who are not in power or in a formal leadership positions). Within a highly effective organization some stakeholders may attempt to avoid change and just continue on the current trajectory. The use of the symbolic frame from Bolman and Deal (2017), specifically the telling of the complete story of the organization, may allow for the resistors to see the entire chronological progression of organizational change. This harkens back to communication to all stakeholders that change is necessary for a great organization to continue to be great. Relational transparency, a dimension of authentic leadership (George, 2003), in regard to the relationship not only between leadership and stakeholders but also between the past, current, and desired organizational state, will assist in the influence leaders may have over resistors who believe the proposed change may not be needed.

Cawsey et al. (2016) also stated that not articulating the desired change in the mission and vision documents of the organization may result in an uncertain vision for the future. An area of growth for APCS can be found in the executive support category of the readiness-for-change questionnaire. Currently, APCS leaders have not formalized a clear picture of the future. Although the administrative council has placed global competencies as an area of focus for the

near future, and the board of directors has included global competencies and international

context as a part of the strategic plan (APCS Board of Directors, 2017b), the vision of the future

has not been described in a manner that would allow stakeholders to understand what the

intended future organizational state is. In the coming months, this state will need to be defined

more accurately within our vision and mission documents and also communicated consistently to

all levels of stakeholders to maximize the readiness for change in the organization.

Chapter 1 Conclusion

The organizational context, introduction, and description of the POP allow for a

foundation to be set and plans made to execute the proposed OIP. The lenses through which the

problem is viewed and a clear description of the problem itself should allow for the organization

to see where it has come from and where it has the possibility to be. In Chapter 1, I framed the

POP in its historical context and, using a PESTE analysis, the internal and external relevant

influences and data were considered. Guiding questions were established and the gap between

the current and desired organizational state was clarified; I also explained why the future state of

the organization would improve the situation for all stakeholders. Using the readiness-for-change

questionnaire (Cawsey et al., 2016), I completed an analysis of the current change readiness

state, and areas of growth and strength were determined. This chapter is the foundation upon

which planning and development can begin.

Chapter 2 presents a five-part analysis of the planning and development that will be

needed to execute this OIP, as follows: leadership approaches to change, the framework used to

lead the change, a critical organizational analysis, solutions that may address the POP, and

leadership ethics and organizational change issues. Each of these five components of planning

and development are an important aspect of the OIP.

Chapter 2: Planning and Development

The second chapter includes an in-depth discussion and analysis of the planning and development needed to move APCS from the current to the desired organizational state through the appropriate leadership approaches. I compare leadership theories and explain a contextually developed framework. An analysis of the of the needed changes is followed by an evaluation of four possible solutions. The concluding section discusses the contextual ethical considerations and how they may apply to the change process.

Leadership Approaches to Change

At times, an intervention is required for change. In many of these cases, modifications may need to be made in the leadership approach and theory of an organization in order to reach the preferred organizational state. At APCS, an implied approach of distributed leadership has been established. A departure from the current leadership approach, one that has been working efficiently, would create resistance and barriers that would impair progress towards the preferred organizational state.

Holistic and numerical distributed leadership have been intentionally and organically cultivated at APCS since its inception. With a clear focus in the charter of fostering student and staff leadership while enhancing parental partnerships (APCS, 2012), the intent to distribute leadership numerically is clear. Allowing for teachers to lead within their campuses, as well as across the APCS system, has become a staff expectation. However, as much as the fostering of leadership is deliberate, the process by which distributed leadership is used for change and implementation is implied. For example, APCS has recently attempted to establish a system-wide assessment and reporting framework. This undertaking provides a rich example of the implied distributed leadership model for change at APCS.

The process for change started from within the organization. Middle school teachers voiced concerns with the inconsistencies in the current reporting system. Campus leadership at the middle school level began to discuss the issues that were brought to them with other middle school administrators, who in turn raised them with the administrative council. The educational leadership team asked the coordinator of instruction to lead a committee to analyze the APCS assessment practices and compare them to other jurisdictions. On that committee was representation from all campus level administration teams, as well as central office. Other assessment frameworks from other jurisdictions, local and international, were analyzed and discussed. During this time, and partially due to the work of the committee, assessment became a system-wide focus. The committee decided to lead the development of a system-specific assessment framework to guide the decisions on assessment within APCS, and drafted a preliminary framework. Interested teachers were asked to apply to be on an assessment framework committee. Applications were reviewed by the administrative assessment committee, and 15 teachers were selected from all grade levels and subject areas. This committee analyzed, scrutinized, and edited the framework, and prepared it for rollout and implementation. The teachers from the committee led the final collection of feedback from all staff, and they will be leading the learning and professional development for the implementation of the new APCS assessment framework.

Using the change path (Cawsey et al., 2016) to analyze development of the APCS assessment framework creates a clear picture of distributed leadership. Moving from the awakening stage, when middle school teachers raised issues about our reporting practices, through the mobilization stage, when the gap of not having a clear framework for assessment was established, to the acceleration stage, where planning and implementation of the framework

was initiated, has been a three-year process. The institutionalization stage, where the change will

be monitored and becomes inherent, has just begun. The multiple levels of leadership, the

number of staff, the time allotted, and the relationships and collaborative nature of this process

are prime examples of how change is achieved through numerical and holistic distributed

leadership at APCS. If a more top-down approach to intervention and change were used—that is,

if central office had developed the framework, and it was mandated and implemented without

distributing the leadership—it could easily have been met with strong resistance and criticism.

If a significant change is to be made in the leadership approach at APCS, it is in learning

how and when to leverage the current leadership approaches to effect change. In order for this to

occur, APCS will need to become more cognizant of the distributed leadership approaches that

are being used, and perhaps deliberately engage in them. Cawsey et al. (2016) discussed the

deliberate nature of change agency and emphasized that the skills required are "sought-out" (p.

266). Viewing APCS and its distributed leadership model as a culture that could be capitalized

on to create change, and having a deliberate understanding and use of the current processes and

frameworks available, would improve efficacy in achieving the new desired organizational state.

Framework for Leading the Change Process

Analysis of relevant framing theories. Building on Lewin's (1951) model of unfreeze-

change-refreeze, Weick and Quinn (1999) compartmentalized the change model into episodic

and continual change. The conceptualization of inertia and perceived environmental demands are

the characteristics that distinguish episodic change from continual change. Episodic change also

tends to occur during specific periods and is precipitated by an external stimulus. Organizations

engaging in continual change are considered "emergent and self-organizing, and change is

constant, evolving, cumulative" (Weick & Quinn, 1999, p. 366), whereas organizations that

participate in episodic change are "inertial and change is infrequent, discontinuous, intentional" (Weick & Quinn, 1999, p. 366).

Weick and Quinn (1999) also distinguished between episodic and continual change using Lewin's language, describing continual change as a process of "freeze, rebalance, unfreeze" (p. 379) and episodic change as "freeze, transition, unfreeze" (p. 379). An analysis of APCS would reveal similarities to both models of change; however, there are organizational distinctions that align our context with episodic change and its tendency to transition and not rebalance. Understanding the intricacies of the APCS as an organization, and specifically the process of previous change in the organization, discloses an alignment with transition and its characteristics of intentional, discontinuous, and infrequent change (Weick & Quinn, 1999).

Inertia, defined in *Merriam-Webster's Collegiate Dictionary* as "indisposition to motion, exertion, or change" (n.d., para. 2), can often be an unintended consequence of consistent performance in successful organizations. The negative connotation of inertia may infer that the organization is lethargic or stagnant, but that is not the case. Inertia refers to the periods of time when, from a macro level, the organization is perceived to have a repetitive nature with episodes of significant change. However, when viewed at the micro level, there is a consistent amount of adaption and adjustment (Weick & Quinn, 1999). Inertia "creates the tension that precedes episodic change" (Weick & Quinn, 1999, p. 369), but there are specific internal and external sources that activate interventions or change.

Huber, Sutcliffe, Miller, and Glick (1993) referred to five influences that precede episodic change: environment, performance, characteristics of top managers, structure, and strategy. Although all five can be identified in the proposed change at APCS, as well as in previous interventions and change, two of the triggers, environment and characteristics of top

manages, are specifically applicable to the proposed change. First, the educational environment

in which APCS is currently operating, locally, nationally, and internationally, has increased the

motivation to focus on the provision of an international context and the teaching of global

competencies. For example, as noted in Chapter 1, the Council of Ministers of Education Canada

(2018) has established six pan-Canadian global competencies believed to be needed to thrive in

the global community, but they are also reflected in the school and local community. This

environment includes the ethnic and cultural diversity of our stakeholder demographic, which

has progressively increased since the school's inception and is described in the organizational

context in Chapter 1, as well as the educational landscape of Alberta and Canada, and its trend to

a more globally focused education (Alberta Education, 2017; Council of Ministers of Education

Canada, 2018). APCS has been responsive to current trends in educational research. Its

environment in the past and a portion of its motivation to move to the desired organizational state

of being a highly effective international public school are derived from these external stimuli.

   Second, the top managers or leaders of APCS have displayed the characteristics needed

to activate change. Huber et al. (1993) referred to certain personality traits of leaders that may

encourage or activate change; specifically, their desire to achieve and their ability to control

events. The leaders within APCS embody the desire to achieve. This trait can be observed in the

both the current changes that are proposed in this OIP, as well as those that have preceded. For

example, the current superintendent, with his intentional focus on the internationalization of

APCS, and the response of the board of directors and administrative council to establish global

competencies as a primary focus of strategic planning, demonstrate a transparent desire for

APCS to improve and achieve. As well, the explicit and deliberate nature of organizational

change, derived from the success of previous interventions, shows a clear tendency towards the

organizational leadership's desire to control events. This may seem incongruent to the proposed model of distributed leadership; however, controlling events does not necessarily mean leadership dictates change. This control could be done through the processes and policy that currently exist at APCS. With these skills and traits, APCS's leadership is capable of developing a context-specific and unique conceptual framework for change.

Conceptual framework for change. For APCS to understand, evaluate, and implement the changes needed to move from the current to the desired organizational state, individual and institutional leaders may have to adjust their practice. Leaders within the system may need to deliberately engage in a conceptual change framework that, although currently implied, has not been articulated as a framework which may be used to lead desired change. The theories selected are ones that reflect the leadership perspectives and organizational context of previous changes observed at APCS. The suggested theoretical framework is an amalgamation of the change path (Cawsey et al., 2016) and the four frames of leadership (Bolman & Deal, 2017), viewed through the lens of servant leadership (Greenleaf, 1977; Liden et al., 2008), authentic leadership (Avolio et al., 2009; Duncan et al., 2017; George, 2003) and distributed leadership (Gronn, 2000, 2002, 2008, 2016; Harris & Spillane, 2008; Orlina & Spillane, 2005; Spillane et al., 2001). These theories, some of which are familiar to the organization, may need to be employed explicitly in order to efficiently manage the desired change.

In order to avoid "the empty chasm between noble aspirations and disappointing results" (Bolman & Deal, 2017, p. 21), I developed a conceptual framework within the specific context of APCS using the metaphor of climbing a mountain to represent the change path (Cawsey et al., 2016), the framework to be used for bridging the gap between the current and desired organizational states. All journeys require organization and planning, and the climb from

APCS's current organizational state to the desired summit state is no exception. This ascension

will require certain climber attributes (servant leadership), proper climbing gear (authentic

leadership), and the establishment of a base camp (distributed leadership). In order to thrive in

the terrain, a method of constant monitoring of conditions (the four frames) will be needed to

adapt and modify skills, gear, and team. Any journey worth taking is worth preparing for.

Organizations are longing for leadership that is "transparent, morally grounded, and responsive

to people's needs and values" (Northouse & Lee, 2016, p. 80). The desire is that this conceptual

framework will be the foundation that APCS needs in order to provide this type of leadership

during the change process. The following sections describe the different theories and how they

combine to create a conceptual framework, entitled the Change Climb (see Figure 5), that may

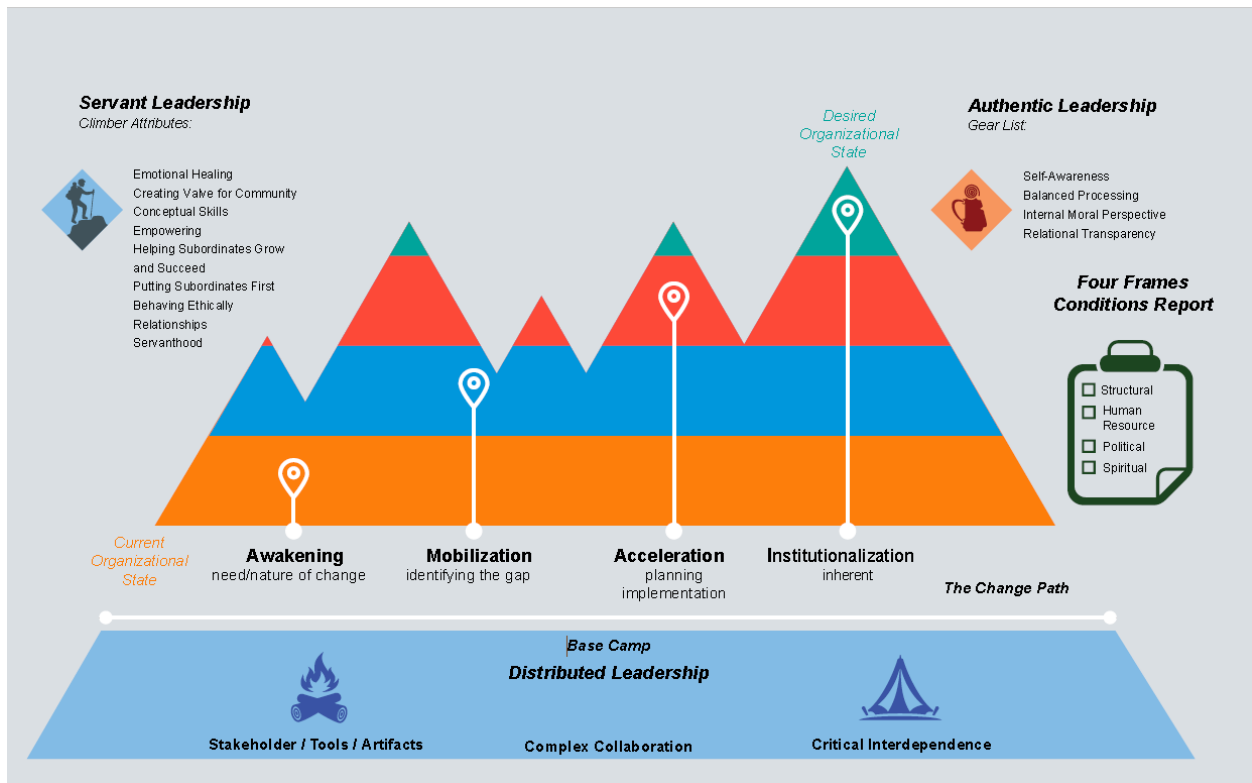be used to facilitate the organizational change at APCS.

Figure 5. Representation of the proposed organizational improvement plan, the Change Climb.

Base camp: Distributed leadership. Base camp is where the team is assembled. APCS has an established culture of distributed leadership (Gronn, 2000, 2002, 2008, 2016; Harris & Spillane, 2008; Orlina & Spillane, 2005; Spillane et al., 2001) that will be the foundation of the climb. A keen understanding of our stakeholders, tools, and artifacts is needed to begin the process of establishing direction. Within this perspective is a required comprehension of the current processes used to complete the complex collaboration that has become key to the implementation of change and intervention at APCS. When a change is proposed, there is a culture of distributed leadership that, although not described in policy, would be required to move forward with any proposal. This creates a critically interdependent relationship between the individuals who are proposing the change and the system in which it is occurring: APCS. To attempt a significant change using an external process would undermine the climb before the team left base camp.

Climber attributes: Servant leadership. In order to be a capable climber, one must acquire certain abilities. Those involved in the climb at APCS will need to be servant leaders (Greenleaf, 1977). Liden et al. (2008) established certain attributes that would allow for climbers to be ready for the journey, including emotional healing, creating value for community, conceptual skills, helping subordinates grow and succeed, putting subordinates first, behaving ethically, relationships, and servanthood. Servant leadership may create specific obstacles that will need to be overcome. Liden et al. (2014) indicated that balancing the "concerns of and preferences of multiple stakeholders" (p. 4) may be challenging. However, servant leaders are not "seeker[s] after solace. They have their own inner serenity" (Greenleaf, 1977, p. 15). Servant leadership may be challenging. but the positive effect it can have on a community is significant (Liden et al., 2014). An understanding of the expectations of servant leadership within the

context of APCS would lead one to believe that these attributes would be required within the

organizational leadership team. The combined contextual model proposed creates the

foundational strength needed to progress to the desired organizational state.

   Gear list: Authentic leadership. What one carries on the climb can be as important as

one's own attributes or the team one is climbing with. Authentic leadership (Avolio et al., 2009;

Duncan et al., 2017; George, 2003) has four elements that will need to be present in order to

climb the mountain efficiently. *Self-awareness* will be needed to understand the limits of the

team and how those limits will establish the pace of travel on the journey. *Balanced processing*

is required to analyze resources and available information, so that the right decisions are made at

right time in order to continue the climb. An *internal moral perspective,* to which all members

will need to subscribe, can be provided by the vision and mission of APCS. The final element is

relational transparency. Transparency is an essential element of the trust that is required on all

difficult climbs. Authentic leadership is "a significant and positive predictor of organizational

citizenship behavior, organizational commitment, and satisfaction with supervisor and

performance" (Avolio et al., 2009, p. 424). Equipping the team with authentic leadership "gear"

may mitigate significant barriers and pitfalls throughout the climb.

   Conditions report: The four frames. As all climbers know, the conditions on the

mountain need to be constantly monitored. The four frames (Bolman & Deal, 2017) provide a

way to observe and respond to the conditions during the ascent. All current APCS system leaders

have a solid grasp of the four frames (i.e., structural, human resource, political, and spiritual) due

to previous professional development and a continued use of the frames, so there is common

language that may be used on the climb. The conditions are described using the four frames

because they are constantly changing and will need to be analyzed and adapted to. This model

allows any individual to monitor the environment and provide clear communication to the team

if conditions change or need to be reconsidered. "Learning multiple perspectives, or frames, is a

defense against thrashing around without a clue about what you are doing or why" (Bolman &

Deal, 2017, p. 23).

       The mountain: The change path. The climb itself will be framed using the change path

(Cawsey et al., 2016). This change model was chosen because it provides a linear, yet flexible

and simple, structure in order to understand the stages of change in an organization. APCS is

easily placed at a specific point in the path, as it has already moved from the awakening stage,

where the need and nature of change is established, to the mobilization stage, where the gap

between current and desired organization state is identified, within the last five months. It will

not be long before the acceleration stage, and planning and implementation, will begin.

Establishing a program for global competency and global experience is part of the APCS

strategic plan, and the transition to the institutionalization stage is a goal of the organization that

has been established at the system level.

       The proposed contextual change framework takes into consideration the current

organizational culture of APCS and the previous change processes observed. All three leadership

theories honour the past and present leadership perspectives reflected at APCS. The authentic

leadership principles of relational transparency, balanced processing, and moral perspective

(Avolio et al., 2009; Duncan et al., 2017; George, 2003); the servant leadership principles of

valuing the community, putting subordinates first, and servanthood (Greenleaf, 1977; Liden et

al., 2014); and the complex collaboration and critical interdependence of distributed leadership

(Gronn, 2000, 2002, 2008, 2016; Harris & Spillane, 2008; Orlina & Spillane, 2005; Spillane et

al., 2001) resonate with the system's vision and mission. The combination of the most

appropriate components of these theories creates a foundational picture of the leadership

practices and perspectives at APCS. In addition, the change path (Cawsey et al., 2016) and the

four frames of leadership (Bolman & Deal, 2017) contribute the structure and language that will

allow for a more deliberate and efficient progression from the current to the desired

organizational state. The strength of this proposed change framework is derived from the

combination of the most applicable components of these leadership theories and change models.

Critical Organizational Analysis

A critical analysis of the organization is paramount to understanding the change required

and the possible change frameworks that could be utilized. By combining the change readiness

findings and relevant research to create a gap analysis, and diagnosing the needed changes using

the contextual framework developed, one can complete a critical analysis of APCS. This analysis

may provide directional information when leading the changes proposed in this OIP.

Change readiness findings and relevant research. The readiness-for-change

questionnaire (Cawsey et al., 2016; see Appendix A), completed using my current experience

and agency, would suggest that APCS is an organization that has managed change efficiently in

the past. Having a change readiness assessment completed by a sufficient sample and spectrum

of stakeholders from across the system would provide a more reliable measure of the

organization's change readiness. According to my results, as noted in Chapter 1, the organization

scores well in all six categories of change readiness. APCS achieved a perfect score in the areas

of previous change experience, credible leadership and change champions, and measures for

change and accountability. These three categories are perceived areas of strength and, although

there can always be improvement, there is no immediate attention required to facilitate change in

these areas.

The categories of executive support and openness to change are areas where the organization will need to improve. Within the category of executive support lies an opportunity for top leadership to establish a new vision and mission that account for the direction in which the board of directors wishes to lead APCS. Although articulated in its strategic planning (APCS Board of Directors, 2017b), the desired organizational state of international context and global competencies has not been expressed in the vision or mission of the organization. Cawsey et al. (2016) cautioned that, unless specified in an organization's mission and vision, the direction of significant change may be unclear to stakeholders and could cause confusion and delay. Before this change continues, it may be wise for the leadership at APCS to revisit the mission and vision of the organization to accommodate the move to the desired organizational state and to leverage the areas of strength found in the change readiness questionnaire.

A more significant area of growth in the measurement of change readiness may be in the category of openness to change. Within this category are four areas of improvement that will increase the organization's readiness for change. Analyzed in greater depth in the Organizational Change Readiness section of Chapter 1, the primary areas of growth are scanning mechanisms and how those mechanisms are monitored, communication channels, turf protection, and how those not in power may view the change as unnecessary. APCS has methods for scanning the organizational environment, but it does not have any explicit method of monitoring those mechanisms to establish the need for organizational change. Its communication is transparent, but the channels by which it communicates change may be considered unclear. Turf protection is manifested in stakeholders holding fast to past initiatives and resisting the transition involved in change. This needs to be approached as both problematic and opportunistic (Cawsey et al., 2016). Those who resist change in a healthy organization, such as APCS, display a devotion to

the organization's past successes. These stakeholders may not be stubborn, but may rather have

concerns that, if addressed properly, could strengthen the change process. Perhaps one of the

most significant areas for growth is that those not in power view may change as unnecessary. It

is expected that many stakeholders in a successful organization may not see the need for change.

In that case, organizational leadership may choose to convince and influence those who view the

changes as unnecessary through the transparency, conceptualization, and empowerment (Liden et

al., 2008) of servant leadership. Although APCS has facilitated change well in the past, each of

these spheres is an aspect of change readiness that, if improved, would allow for more effective

management of the change process.

Gap analysis. In order to produce a gap analysis between the current organizational state

of an effective and high-performing public school (Shannon & Bylsma, 2007) to the desired

organizational state of being an effective and high-performing international public school, the

difference between where the organization "presently is and where it needs and wants to go"

(Cawsey et al., 2016, p. 54) must be articulated distinctly. In Chapter 1, I provided an

organizational context that clearly describes the current state of APCS. The desired

organizational state will need to be described in more depth in order to take the next step of

considering possible solutions.

Although APCS scores at the highest level of change readiness (Cawsey et al., 2016),

significant changes will need to be made at the structural, human resource, and symbolic levels

(Bolman & Deal, 2017) in order to achieve the desired organizational state of becoming an

effective and high-performing international public school. This OIP is intended to address the

POP of a lack of global competencies taught, and international context provided, at APCS. There

is currently no explicit teaching of global competencies and no international context is intentionally provided at APCS.

Global competency. Through our K–12 character curriculum, students are taught about the virtues of compassion, integrity, self-discipline, responsibility, and respect (APCS, 2018a). Although there is unintentional overlap with the principles of global competencies, there is no mention of these competencies in the curriculum. Culture is discussed in a module within the Grade 11 Leadership with Character course, and awareness is promoted, but there is no assessment of this knowledge. There is a significant gap between the current character education curriculum and the attitudes, knowledge, and behaviours required to be globally competent (Deardorff, 2006). This gap will need to be bridged using both teacher professional development, and course content and curriculum for the students; doing so will require adjustments within the human resource and structural frames (Bolman & Deal, 2017) at APCS.

International context. No international experience or context is currently provided at APCS, and there is no overlap between the current programming and the changes that will need to be made to bridge the gap. To provide international context, some barriers (financial, cultural, political, etc.) may need to be overcome; I discuss these barriers in the next section, Possible Solutions to Address the Problem. The gap between current and desired organizational state is clear and will need to be closed with minimal cost. APCS has no international student population; all our students reside within the geographical region of the school. We also have no framework for international teacher exchanges, although a few of our staff have completed exchanges through external organizations. Our students have no opportunity to travel abroad through the APCS academic cocurricular programming, although there have been sporadic opportunities in the past that were discontinued due to the financial constraints of our students.

As a public school, we do not have a budgetary excess that allows us to easily provide this context, nor does our student demographic allow us to create a fee-based international student program. Providing these services and opportunities will require changes both within the human resource and structural frames (Bolman & Deal, 2017) of our organization, with little to no budgetary allotment.

The gap described above will also need to be considered symbolically. Bolman and Deal (2017) described organizations as "constantly changing organic pinball machines" (p. 242). This type of environment forces leaders to consider cultural changes, such as the introduction of global competency education and an international context, as an adjustment to the organization itself, and to take care of the stakeholders as the changes occur. There are five suppositions that will have to be considered:

- what happens is not as important as what it means;

- organizational changes have multiple interpretations;

- symbols assist in limiting confusion in the face of ambiguity;

- events and processes are more important for what they express or signal than their intent; and

- culture is the cohesion that bonds an organization (Bolman & Deal, 2017, p. 241).

Although the symbolic frame does not articulate the gap, gaps may form symbolically that are not understood until the organization is engaged in the change process. These symbolic gaps will need to be addressed both proactively and reactively to allow for an efficient change and to provide an environment that reduces confusion and uncertainty.

Framework analysis. Understanding and analyzing the changes needed through a selected framework can provide support for "convincing others about the wisdom of spending

time and money now for an uncertain future return" (Cawsey et al., 2016, p. 44). In this section I

analyze the proposed changes using the four stages of the change path model (Cawsey et al,

2016): awakening, mobilization, acceleration, and institutionalization. I conclude it with a brief

framing analysis using Bolman and Deal's (2017) four frames of leadership theory (structural,

human resource, political, and symbolic). These tools are combined in the Change Climb, as

presented in Figure 5, the contextual framework for change proposed in this OIP.

Before I place the changes needed within these theories, it is important to understand the

nature of the models themselves. Although linear, as the term "path" suggests, the change path

model (Cawsey et al., 2016) provides flexibility when determining where in that model the

necessary changes lie. Some of the changes proposed may be appropriate earlier in the change

process, whereas some may be appropriate farther down the path. The four frames of leadership

(Bolman & Deal, 2017) allow for flexibility and are not bound by timeframe or order; they exist

as lenses applied over certain situations to foster contextual perspective shifts based on the

situation or organization and the frame used. The two substantial changes proposed, teaching and

learning of global competencies and an international context provided at APCS, are placed

within each stage of the change path (Cawsey et al., 2016) and viewed through the appropriate

lens of Bolman and Deal's (2017) four frames of leadership.

Awakening. The awakening process of the change path (Cawsey et al., 2016) involves

scanning and gathering information in order to perform an organizational analysis. Concerning

global competencies, this investigation will need to be completed both externally, discovering

the current trends and history of global competency learning and assessment, and internally, to

understand what crossover exists between what is already being taught and what will need to be

added or highlighted within the current programming at APCS. Scanning is also needed to

establish the professional development training required to provide the resources, skills, and

understanding that teachers will need in order to effectively teach global competencies. A solid

understanding of the educational programs offered that provide an international context to

students will also be required, including the resources, costs, and barriers these organizations

deal with when providing such a program. It may be helpful to perform an internal audit of the

international education and experiences our staff have already completed. Knowledge of the

current levels of internationalism within the organization may reveal change agents and

champions who could lead throughout the change process.

   Mobilization. With the internal and external environments have been scanned to establish

the gap between the current and desired organizational state, the work can begin on bridging that

gap. Both teaching global competencies and providing an international experience require the

leverage of formal structures in order to achieve the desired organizational state. The numerically

distributed model (Gronn, 2002), which is one aspect of the contextual leadership model

described in Chapter 1 and referred to again earlier in Chapter 2, could be applied to organize

professional development and resources using the established change agents within the

organization. Gathering these change agents and placing them within the contextual change

model provided should create efficacy in reaching the desired organizational state. These agents

could also be utilized to assess power and cultural dynamics, and then activate the support

needed for the change required. Consistently communicating the need for change and the

benefits change could bring to stakeholders will be important to preserve transparency and trust.

   This communication could be maintained formally through leadership teams, central

office communication, and policy, as well as informally through stakeholder change agents,

celebrations, and updates. Understanding the distributed nature of the organization's leadership,

both numerically and holistically (Gronn, 2000, 2002, 2008, 2016; Harris & Spillane, 2008;

Orlina & Spillane, 2005; Spillane et al., 2001), will allow leadership to maximize the positive

impact of the change vision and implementation (Cawsey et al., 2016) and increase the efficacy

of the move to the desired organizational state of a high-performing international public school.

The majority of the current work of the OIP is being completed within this process.

  Acceleration. The acceleration stage of the change path (Cawsey et al., 2016) describes

the organization's ability to create and maintain momentum within the change process. The

global competency education and international context provided at APCS will need to be

maintained and improved in this stage. The focus on teacher professional development will need

to continue in order for them to "develop new knowledge, skills, abilities, and ways of thinking

that will support the change" (Cawsey et al., 2016, p. 55). It would also be within this process

that the sharing of our global competency teaching and our international context would be

appropriate. Reaching out to other jurisdictions that are interested in these programs and

presenting at conferences would allow us to share small victories with the greater community,

and in turn allow the same within APCS. This endeavour to share our innovative international

programming, specifically for a public school, will build momentum and accelerate the progress

of the change. The transition will need to be continually managed as the change accelerates.

Though the change path (Cawsey et al., 2016) model seems linear, it may be appropriate at this

time to revisit previous processes to rearticulate the gap, adjust the vision of change, or seek out

new change agents and champions.

  Institutionalization. During the institutionalization process, the change will need to be

tracked and monitored to measure progress toward the desired organizational state, and to

determine if any adjustments need to be made to modify structures or alleviate risk. APCS has a

current structure of internal surveys completed by stakeholders that, if adjusted to address the

proposed changes, would allow for the yearly monitoring of the change process. An analysis of

these data would allow for new structures and processes to be developed, new change agents to

be discovered, and new skills, knowledge, and abilities to be implemented. This stage of the

process creates a constant attention to the changes made to ensure the desired state of APCS

becomes inherent.

     Value of framing. The four frames of leadership created by Bolman and Deal (2017)

may be used to provide context and a common language on the proposed change at APCS. The

core of the administrative leadership team at APCS understands the four frames (structural,

human resource, political, and symbolic) and has participated in professional development on the

frames and their use. If applied, however, this familiarity may need to be revisited.

Understanding, for example, that structural solutions to change barriers also need to take into

consideration the symbolic or human resource frame, or being able to articulate that a change

agent being used in the human resource frame may have serious ramifications in the symbolic or

political frame, will be important as the change leaders navigate the extended period of time that

change such as this may take. The frames provide a common language and understanding that,

when deeply understood, will mitigate confusion and allow for efficacy in the change process.

Possible Solutions to Address the Problem

     The possible solutions that would address the lack of global competencies taught and

international context provided are many. This problem is complex and is likely to be resolved

using a number of solutions simultaneously. These solutions could involve clear communication,

training for staff, programming adjustments, partnering with external organizations, providing

opportunities for international exchange and travel, and possible system consultancy. The

suggestions I include in this section could also be considered one solution with many parts—all

of them could be a component to solving the problem. These solutions could also be initiated

simultaneously and completed by different levels of leadership in the organization. Some of them

are multifaceted and will need resources and a substantial time commitment for their

effectiveness to be completely evaluated. Others are simple and do not require considerable

resources, but may be effective strategies for taking the smaller steps required to reach the

desired organizational state.

I present possible solutions in order of simplicity. The final solution will have the greatest

impact, but it also requires the greatest amount of intervention. It will be analyzed using the Lean

Startup methodology (Lean Startup Co., n.d.) as it would be applied to an educational

organization.

Solution 1: Status quo and communication. Regardless of the lack of intentionality on

the internationalization of APCS, the school has a culturally diverse student demographic, a staff

with a substantial amount of international experience and education, and a K–12 character

education and leadership curriculum that share several outcomes and competencies within global

competency models. However, in order for the status quo to be considered a viable solution, an

intentional communication of the international features that currently exist would need to be put

in place, and the language regarding these aspects would have to be agreed upon and

coordinated. There would be little to change culturally or organizationally, and any change

needed in regard to aspects of the language could be completed at the campus level. A minimal

amount of resources would be required. The models proposed, Deardorff's (2006) pyramid

model of intercultural competence and the OECD's (2018) dimensions of global competence

(see Figures 2 and 3, respectively), could be used to provide the language and structure that

would need to be changed. The benefit to this solution is the simplicity. Building on the program

already in place, status quo and communication could move the organization directionally to a

more globally competent graduate profile without significant change needed at the system level.

Solution 2: International programs. The implementation of international programs has

been effectively used by public school systems to increase the international context in Alberta

(Alberta Education, 2017). These initiatives, such as international teacher and student exchanges,

as well as incoming international students, form a common practice that APCS has yet to adopt.

Considerable resources would need to be allotted for this work to be initiated, primarily human

and fiscal. The advantage to this solution is that the incoming international student fees would, if

properly organized, offset the fiscal cost and provide a consistent income for the system. Each

incoming international student pays $12,154 in study-related fees. Tuition, paid to the school, is

91% of those fees (Alberta Education, 2017). Creating 50 international student positions would

create a yearly income of approximately $550,000. Using these funds, it would be feasible to

create the structures needed to allow teachers and students to participate in exchanges and

establish an international student program. Human resources could be committed to this initiative

with the understanding that the new income provided by international students would sufficiently

cover the cost.

Over the past six years, numerous teachers have approached me, as a formal leader in the

system, to ask if APCS has a program or policy established to facilitate international

teacher/student exchanges. There is no current program offered. Some teachers have used

external organizations to participate in exchanges, but APCS does not currently facilitate them.

Establishing an internal structure to facilitate this process may increase the number of

international teacher exchanges. APCS has yet to participate in any international student

exchanges and would be able to initiate such a program if resources and supports were available. With the current international focus of our board of directors, the interest in global competencies at the administrative level, the financial viability of incoming international students, and the previous inquiries made by our staff, it is a logical conclusion that establishing an internal structure at APCS to facilitate incoming international students and international student/teacher exchanges would be a possible solution to growing our international context and improving the international profile of the system.

Solution 3: Strategic partnerships. Within this section I discuss four possible strategic partnerships: regional consortia, post-secondary institutions, international schools, and international consultancy.

Regional consortia. The APCS strategic plan mentions the establishment of strategic partnerships as one method of creating an international context (APCS Board of Directors, 2017b). These strategic partnerships within the local and international community fit well within the organizational model of distributed leadership (Gronn, 2000, 2002, 2008, 2016; Harris & Spillane, 2008; Orlina & Spillane, 2005; Spillane et al., 2001). Partnering with local regional consortia may be a means of establishing a global competency certification for staff of APCS and other school systems in Alberta. The GCAA (Global Competence Associates, n.d.) could be used to assess the level of global competency of those who have completed the course and to identify the staff associated with the global initiatives who have already completed it; this would allow for local certification to be provided. With the system focus, available technology, the use of current informational resources, and staff interest already established, these partnerships could be formed with minimal additional resources or amendments to the organization or culture.

Post-secondary institutions. APCS has established partnerships with post-secondary institutions, and future partnerships are being considered. The research grant provided in the spring of 2018, entitled "Demographic Variables Impacting the Global Competence Knowledge, Skills, Attitudes and Experiences of Albertan K–12 High School Students and Staff" (APCS Board of Directors, 2018b, p. 1), allows for APCS to work with two local universities to measure the current level of global competency within a sample of our staff and students. This collaboration should provide baseline data needed to articulate the gap between the current and desired organizational state. It may also provide leverage in partnering with other post-secondary institutions, or further partnerships with current post-secondary institutions, if the research project is perceived as being a success. Given that these partnerships may be grant based and mutually beneficial, few additional resources are needed beyond the commitment of time and human energy. Understanding that these partnerships have already begun informs leadership within the system that they are supported culturally and organizationally.

International schools. Within the same research project are partnerships with a local international public school and an international private school abroad. Creating strategic partnerships with other schools already having, or attempting to implement, international context and global competencies may allow for a more efficient progression to the desired organizational state. Each of these partner schools is completing a collection of sample data using the GCAA (Global Competence Associates, n.d.) that would allow them to measure the existing level of global competence in their organization. It may be possible to compare the data collected at APCS and create interventions to increase those measurements.

There have also been inquiries as to how partnering with other international schools at the campus level could provide a more international context. APCS has been approached to become

a sister school to an overseas international school, allowing students and staff to observe an

educational environment in another cultural and educational context. With the implementation of

a teacher and/or student exchange program, and using the proposed structure above, our staff and

students may have the opportunity to experience these same cultural and educational variances.

Technological resources could also be leveraged to provide online exchanges via social media,

conferencing technology, or virtual exchanges. Similar to the above suggested solutions,

partnership with international schools requires minimal fiscal resources by reason of the

established staff interest, present partnerships, and current technological resources.

    International consultancy. The possibility of sharing innovation and research completed

at APCS through international consultancy is a solution that has yet to be explored. As a public

charter school in Alberta, APCS is required to provide an educational environment not existing

in its public geographical educational system (The Association of Alberta Public Charter

Schools, 2016). This creates a unique opportunity for public charter schools, and specifically

APCS. These innovations have been shared haphazardly through conferences, symposia, and

partnerships since the inception of APCS in 1997. An explicit sharing of these elements, both

locally and internationally, may increase the international context within the organization. APCS

has been approached by individuals and organizations in the past with opportunities to share its

innovation and research, but has yet to establish a structure to facilitate this dissemination. The

creation of a support mechanism for this consultancy would facilitate a more effective

distribution of our unique educational elements, such as our teaching and learning framework,

our generative dialogue process, our teacher coaching framework, our character curriculum, and,

if achieved, our global competency program.

Two viable options are possible for this consultancy. First, a partnership with an existing

international consultant firm could provide the framework required to access current

opportunities to work with other systems, as well as information on conferences and symposia

where our innovation and research could be shared. In order to facilitate this partnership,

resources, specifically human, would need to be committed to liaise with the chosen

organization. This could be done through the allocation of human and fiscal resources from our

central office. These resources could be offset by the incoming financial benefits of the

consultancy; even so, the degree of resources committed may be limited when compared to the

other alternative.

Second, APCS could create an international consultancy firm of its own, a more

substantial endeavour, but one that may provide more institutionalized (Cawsey et al., 2016)

organizational change. This second solution would require a greater degree of commitment of

resources from the organization. The culture of the organization would need to be considered

through the human resource and symbolic frames (Bolman & Deal, 2017), and transparency

would need to be maintained in order to facilitate the addition of a new division to the APCS

system. These changes may be interpreted as being beyond the intended scope mandated to

public charter schools, and the political frame (Bolman & Deal, 2017) of the desired change

would need to be considered as well. A substantial amount of human and fiscal capital would be

needed to facilitate this solution. A possible new leadership position may need to be established,

in the form of a central office coordinator or a committee created, in order to provide the support

needed to create this subdivision of APCS.

An alternative option may be to create a separate, yet associated, consultancy firm that

would utilize the human resources of APCS. Staff could participate in strategic secondments that

would allow for the opportunity to participate in the consultancy. This option may have the

added benefit of professional growth and development, but may also create resistance from

stakeholders who believe it could detract from the teaching and learning at APCS. The planning

and development of such an entity would be extensive. Business planning (perhaps through an

external organization due to a lack of expertise and experience) and entrepreneurial learning

within APCS would need to be completed for this option to be viable. The financial advantages

of this solution may contribute significantly to the long-term sustainability of APCS; the

proliferation of educational consultancies associated with public schools, such as this, could

realign the current perceived relationships between for-profit business and publicly funded

schools, and perhaps even change the greater educational landscape.

     Solution 4: Global competency education. Discussed within this section are two

possible areas of change concerning global competency education: globally competent staff and

globally competent graduates.

     Globally competent staff. I believe that in order to teach global competencies as

effectively as possible, APCS will need to be staffed by teachers and administrators who are

globally competent. The origins of this solution come from conversations on cultural

insensitivity between me and an alumnus of our high school. The diversity of our student

demographic would suggest that a globally competent staff disenfranchises fewer, and connects

to a greater, number of students on campus. This solution would involve providing professional

development on global competency for all staff, not just instructional staff. Utilizing Deardorff's

(2006) and the OECD's (2018) models, and perhaps the help of the strategic partnerships

mentioned above, APCS may be able to create a professional development program that would

allow for teachers to obtain certification in global competency. The goal of this education would

be to become globally competent while working within the diverse cultural demographic that
APCS provides.

The course could achieve this outcome by being both experiential and informational. The
informational portion could be delivered in a number of ways. First, it could be done digitally;
staff could be provided with an online global competency course that would require completion
within a certain timeframe. Second, it could be accomplished through traditional, face-to-face
learning. Staff could complete the course within the professional development schedule of the
system, or perhaps on evenings, weekends, or in the summer, if compensation were provided.
This compensation could possibly be supplemented by offering the training to other systems or
jurisdictions at a cost. Hunter et al. (2006) suggested that globally competent employees are in
demand and will continue to be; this circumstance may provide an opportunity for employees
from outside the educational landscape to take the course, creating another revenue stream and
the resources to offset the training of APCS's own staff.

Experientially, staff may be provided with a framework to allow them to engage with
various cultures in our community. For example, visits to local mosques, gurdwaras, churches,
and temples would allow first-hand experience with other religions and cultures. APCS could
provide professional development where teachers partner with various cultural communities in
service learning and humanitarian efforts. Ideally, this would also be done at an international
level and, through technology, it may be possible without an associated financial cost. In the
future, opportunities for international travel may be viable. For the moment, the cost of these
programs seems out of reach for the entire staff, but teacher and student exchanges may provide
the opportunity for some. Anything more robust would require a significant investment of
financial and human resources.

Globally competent graduates. The provision of a program that would allow a student at APCS to gain the knowledge, skills, and behaviours needed to become globally competent is perhaps the most important outcome to be discussed in this OIP. Although many of the above-mentioned solutions would be part of the internationalization of APCS, this OIP would, in my mind, be less than successful if it did not place student learning and success at its core. In order to provide this opportunity to our students, some significant changes will need to be made.

Global competencies will need to become a system-wide focus. APCS has the advantage of being one school across seven campuses, and it shares key frameworks that could be adjusted to meet these requirements. Our K–12 character curriculum would need to be revisited through the lens of global competencies. This realignment would take a committee of staff members to analyze the current skills, knowledge, and behaviours taught through the curriculum, and adapt them to meet the outcomes put forth by Deardorff (2006) and the OECD (2018)—if those were the models chosen to be implemented.

At the high school level, our Leadership with Character (LWC) courses, mandatory for all students in Grades 9 through 12, would also have to go through the same process. As stated previously, there are overlaps and similarities between global competencies and the current leadership and character curriculum taught at APCS, but the deliberate redirection of these programs and frameworks, and the language that surrounds them, would articulate clearly the acquisition of global competencies at APCS. A small but potentially significant change may be to modify the name of our LWC courses to something that reflects our desire for our graduates to be globally competent. Perhaps "Global Leadership" or "Global Impact and Leadership" may be more appropriate as we move towards a more globally competent graduate profile.

One key component this evolution would be to revise the culminating project completed by our Grade 12 students in their LWC course. Currently, all Grade 12 students participate in what we have titled a legacy project. This is a capstone project that synthesizes the learning that occurs from Grades 9 to 12 in our LWC courses. We have been running these projects for over eight years, and their effectiveness has dwindled over time. The redirection of these projects to achieve impact in the greater community, while students are required to work with different cultures and ethnicities that our student demographic provides, would align well with the models of global competencies that APCS may adopt. A small team of leadership teachers at the high school could make this change with minimal time and human resources. This programming change represents a greater number of small alterations that would need to be made within individual LWC courses in order to provide a more globally focused leadership program.

Through conversations at the system level, there has been mention of providing a certification for students who complete certain requirements by the end of their tenure at APCS—a global competency certificate for students. Realizing this suggestion would necessitate overcoming certain barriers and investing a substantial amount of time and effort. Other school divisions have similar certification, but the weight these certificates carry is unclear as they are few and primarily new to the educational landscape. In order for APCS to implement a global competency certification, a set of requirements would need to be established. These may include meeting the standard of a global competency assessment, such as the GCAA (Global Competence Associates, n.d.); acquiring a second language; completing a global competency portfolio; participating in a global service learning project; and acquiring knowledge of a number of diverse cultures. This list brings to light an issue that Deardorff (2006, 2015) stated in her work: global competency is very difficult to measure and assess. I present my suggestions in

detail in the next chapter, using suggestions proposed in *Demystifying Outcomes Assessment for International Educators: A Practical Approach* (Deardorff, 2015). Similar to the creation of a globally competent staff, developing and implementing a program that explicitly teaches global competencies will take considerable human resource input, which in turn equates to a substantial financial investment.

Lean Startup Methodology

The Lean Startup methodology (Lean Startup Co., n.d.) was developed by Eric Ries in 2011 and has since become a worldwide business phenomenon. The methodology was established to take as much risk as possible out of the start-up process. Initially this methodology was purely entrepreneurial, but it has since been applied to health care, education, and nonprofit organizations. I propose that the primary solution, global competency education, be implemented using the Lean Startup methodology. This model uses the concept of a minimum viable product (MVP) that would manifest itself in educational organizations as interventions and program changes. These "products" are then carefully measured for effectiveness. At that point, the decision is made either to persevere or pivot (Lean Startup Co., n.d.) to efficiently facilitate positive change in the organization. I explain this cycle and its application in greater detail in Chapter 3.

Leadership Ethics and Organizational Change

The primary documents describing the ethical responsibilities of the APCS organization are the *Employment Handbook* (APCS, 2018), the vision and mission, and the charter (APCS, 2012). These documents describe a number of criteria that each employee, instructional staff or otherwise, is expected to fulfill. The relationship between these expectations and the leadership theories proposed to facilitate change is clear. An analysis of the core expectations of staff,

viewed through the lenses of servant leadership (Greenleaf, 1977; Liden et al., 2008), authentic leadership (Avolio et al., 2009; Duncan et al., 2017; George, 2003), and distributed leadership (Gronn, 2000, 2002, 2008, 2016; Harris & Spillane, 2008; Orlina & Spillane, 2005; Spillane et al., 2001) reveals a possible, yet unmistakable, synthesis.

Within the core expectations in the *Employment Handbook* (APCS, 2018) are criteria of having a high standard of professional performance; role modelling; collaborating; serving the best interests of students, families, and the APCS organization; being active learners; having a willingness to change assignments; and committing to professional growth. These expectations are reflected clearly in both servant leadership (Greenleaf, 1977; Liden et al., 2008) and distributed leadership (Gronn, 2000, 2002, 2008, 2016; Harris & Spillane, 2008; Orlina & Spillane, 2005; Spillane et al., 2001). Within servant leadership, the concepts of servanthood, relationships, helping subordinates grow and succeed, and creating value for community are clearly represented. Specific mention in the handbook in regard to who we serve as a community—our students and families—and our organizational values positions APCS as a servant leadership organization first. The distributed leadership connections are also clear. The understanding that valuing the stakeholders, tools, and artifacts of our organization is foundational for the collaboration called for in these expectations indisputably aligns with the distributed leadership model.

Together, the APCS vision and mission, as with any effective organization, form our guide and compass. Our mission states that we aim "to provide a safe and caring environment where academic excellence, character development, parental involvement, and staff leadership are valued and fostered" (APCS, 2012, p. 2) and our vision is "excellence in student achievement and character development through distinctive teaching and learning" (APCS, 2012, p. 2).

Although the connection to the vision is not as strong, it does lend itself to the general principle

of servant leadership and the specific idea of "what can I do" (Greenleaf, 1977, p. 4) as it relates

to student success. This concept is not reserved for leadership or instructional staff, but is

reflected in all members of our community and is enhanced by our implied numerical distributed

leadership model (Gronn, 2002).

Perhaps more easily connected to the proposed leadership models are the ethical

responsibilities of the organization described in the mission. Providing a safe and caring

environment and developing the character of our students directly mirror the relational

transparency described in authentic leadership (Avolio et al., 2009; Duncan et al., 2017; George,

2003) and the relational, empowerment, and community focus of servant leadership (Greenleaf,

1977; Liden et al., 2008). These principles are intended to be modelled by all staff and are a key

component to creating the culture of caring that APCS strives to provide. The mission also refers

to valuing and fostering parental involvement and staff leadership. These principles are easily

viewed in servant leadership (Greenleaf, 1977; Liden et al., 2008) through valuing our

community, helping subordinates grow and succeed, fostering relationships, and empowering

others. Distributed leadership theory (Gronn, 2000, 2002, 2008, 2016; Harris & Spillane, 2008;

Orlina & Spillane, 2005; Spillane et al., 2001) reflects the ethical expectations of our mission

through complex collaboration, critical interdependence, and the value placed on our

stakeholders.

Perhaps the most ethically binding element of APCS is our charter. Clearly defining who

we are and what we are mandated to do, this document is an outline of what we are expected to

provide to our stakeholders as a public charter school (APCS, 2012). The vison and mission are

held within, as are the guiding principles that direct our actions as a school. The connections

referred to above are also apparent in this document. There is, however, a specific statement in

the charter that clearly describes our ethical responsibilities as APCS educators. It states, "APCS

is purposeful and strategic in the selection and utilization of teaching methods and resources"

(APCS, 2012, p. 3). This statement binds us to the principle of balance processing as described in

authentic leadership theory (Avolio et al., 2009; Duncan et al., 2017; George, 2003). APCS

prides itself on making decisions in the best interests of all stakeholders by analyzing the current

body of educational research and data while consulting with key stakeholders. This orientation is

reflected in the change processes completed since the school's inception. The K–12 character

curriculum, generative dialogue, our explicit teaching framework, our coaching model, and our

assessment framework were developed and implemented with balanced processing. Our leaders

are required to refer to relevant data and research while consulting with appropriate stakeholders

and modelling an openness to changing perspectives based the information gleaned from this

process. APCS has a clear commitment to the principle of balanced processing.

Through an analysis of the key documents, it is evident that the chosen models of servant

leadership (Greenleaf, 1977; Liden et al., 2008), authentic leadership (Avolio et al., 2009;

Duncan et al., 2017; George, 2003), and distributed leadership (Gronn, 2000, 2002, 2008, 2016;

Harris & Spillane, 2008; Orlina & Spillane, 2005; Spillane et al., 2001) are aligned with the

ethical responsibilities of APCS. The change issues that arise will be viewed and addressed

through the lenses of the appropriately selected contextual change model. A clear alignment will

allow for minimal resistance and an effective progression from the current to the desired

organizational state.

Chapter 2 Conclusion

Within Chapter 2 the planning and development of this OIP was deconstructed. I discussed the leadership approaches with respect to how these theories and models could assist in the advancement of change as it relates to the POP. A specific, contextual change framework was developed and evaluated using the experience and knowledge of APCS and its history in dealing with and implementing change. I also completed an analysis of the organization, considering the organization's readiness for change and relevant research. The needed changes were diagnosed and analyzed using the different stages of the change path (Cawsey et al., 2016) and the four frames of leadership (Bolman & Deal, 2017). Four solutions were described in detail, outlining the resources needed and the experience and evidence used to suggest the solutions. The chapter ends with a short section reflecting on the leadership ethics and organizational change issues specific to the APCS organizational context.

In the next chapter, I present a three-part analysis of the implementation, evaluation, and communication concerning the completion of this OIP. I discuss each of the three components as they relate to the specific context of the organization and deconstruct each of them in detail to efficiently and pragmatically outline the importance of these aspects of the OIP.

Chapter 3: Implementation, Evaluation, and Communication

I separate this third chapter into five parts. First, I present a change implementation plan, outlining a clear connection with the organizational analysis in the previous chapter. Strategies, goals, and priorities are discussed in relation to the changes needed to progress from the current to the desired organizational state. Within the change implementation plan I describe stakeholder consultation, change agent selection, resources needed, issues to overcome, short- and long-term goals, and limitations. Second, I explain how the change process will be monitored, evaluated, and refined using the Lean Startup methodology (Lean Startup Co., n.d.). Third, I suggest tools that could be used to measure the effectiveness of the change. Fourth, I summarize the communication plan for change and the change process, paying specific attention to the media and methods used to build awareness of the change and celebrate milestones along the Change Climb. Finally, in the conclusion, future considerations and next steps are described and considered.

Change Implementation Plan

Cawsey et al. (2016) wrote that effective and efficient change is deliberate, and that analysis and strategy play a significant role in organizations that manage change, and the change process, to their benefit. Within Chapter 2, an organizational analysis was completed using the readiness for change questionnaire (Cawsey et al., 2016; see Appendix A) that revealed areas that may need to be improved or addressed. Although APCS has many areas of strength, some specific areas may be resistant to change. If addressed properly, through planning and strategy, these issues may strengthen the organization during the change process. The areas of strength suggest that the POP of a lack of global competencies taught, and international context provided, is solvable due to the readiness for change measured in the questionnaire. APCS has established

global competencies as a focus of its strategic plan (APCS Board of Directors, 2017b) and

believes that a globally competent graduating profile is the future of the organization. In order to

provide the programing that would allow APCS to graduate students who are prepared to be

"leaders in an age of accelerations" (APCS Board of Directors, 2017b, p. 4), changes would need

to be made, and those changes will need to be managed.

Managing the transition. Using the Change Climb, the contextual change framework

introduced in Chapter 1, and the leadership theories and change models described within it, the

transition from current to desired organizational state may be managed. The use of servant

leadership (Greenleaf, 1977; Liden et al., 2008), authentic leadership (Avolio et al., 2009;

Duncan et al., 2017; George, 2003) and distributed leadership (Gronn, 2000, 2002, 2008, 2016;

Harris & Spillane, 2008; Orlina & Spillane, 2005; Spillane et al., 2001) theories to understand

and take care of stakeholders, select champions, establish needed supports and resources,

respond to implementation issues, build momentum, and acknowledge limitation connects the

core values of APCS with the proposed changes. The combination of the change path (Cawsey et

al., 2016) and the four frames of leadership (Bolman & Deal, 2017) provides the scaffold that

will support the change and common language to augment communication.

Understanding stakeholders. Having clearly established a culture of distributed

leadership (Gronn, 2000, 2002, 2008, 2016; Harris & Spillane, 2008; Orlina & Spillane, 2005;

Spillane et al., 2001), APCS will need to gauge and understand stakeholder reaction to the

proposed changes. During current and previous changes, stakeholders have been consulted and

engaged at appropriate levels. Not every change requires the engagement of all stakeholders;

however, with the significance of the proposed change and the expectation that leadership at

APCS be distributed, students, parents, instructional staff, and leadership may need to be

involved. The current board of directors has already established global competencies as a strategic direction (APCS Board of Directors, 2017a), and the administrative council has adopted this as a focus as well. The next step in managing the transition may be to communicate this strategy to the instructional staff, parents, and students. Within the change path (Cawsey et al., 2016), this step is described as a part of the awakening stage, where the nature and need for change are described and communicated.

It should be noted that different levels of stakeholders may be at different stages of the change path (Cawsey et al., 2016), ranging from not understanding the need for change to already expecting change to be inherent. This is the case for the proposed change at APCS. Certain campuses, staff members, and leaders have already taken the initiative to move forward with the change process. This differentiation is not necessarily a negative; however, the reaction of some stakeholders will need to be understood and their concerns will need to be addressed in order to satisfy the precedent set by previous change initiatives. Understanding that stakeholders need to be informed may be a significant component of stakeholder management. Some stakeholders may feel left behind, marginalized, or not considered if groups have already started to implement changes. The key to managing this issue will be communication and response. Servant leadership reminds practitioners to put the subordinate first, create community value, and empower stakeholders by maintaining relationships (Liden et al., 2008). Communicating the proposed changes and responding to concerns will be a substantial part of managing our stakeholders through the transition.

Communicating and responding may be enough for our parents and students, but our teachers and other instructional staff may require a method of more direct engagement in order to leverage their expertise and honour the leadership model APCS has used in the past. During

previous change processes, teacher committees have done the majority of the work concerning

organizational change. For example, our distinct teaching framework, our coaching model, and

the assessment and inclusion frameworks were all developed using the expertise and experience

of the teachers in our system. Relying on a distributed leadership (Gronn, 2000, 2002, 2008,

2016; Harris & Spillane, 2008; Orlina & Spillane, 2005; Spillane et al., 2001) model that has

been evident in APCS's past will allow for stakeholder input and ownership of the change

process.

       Selecting champions. The selection of champions has already started to occur. Through

the research grant, approximately 50% of our system leadership team and high school staff have

completed the GCAA (Global Competence Associates, n.d.), a clear indicator of the level of

interest in global competency and international context. Beginning with our superintendent, a

number of teachers and leaders, including myself, have been selected to complete the GCAA to

establish our own levels of global competency. The teachers were selected due to their

involvement with our Grade 9 students, who will also be completing the GCAA, or with our

leadership program. Within conversations on the GCAA, a number of leaders from other

campuses were asked to complete the assessment as well. At the high school, we offered it to our

entire staff, not just our teachers, and another 10 staff members volunteered to compete it, almost

50% of the staff at APCS High School. Staff members who have an intrinsic desire to become

more globally competent may be interested in being a part of the change process that will allow

APCS to become a highly effective international public school.

       Though champions may be identified from the above process, there are also other ways in

which champions may step forward. One of the solutions suggested in Chapter 2 was through

international programs, which would include incoming international students and international

teacher and student exchanges. We, as a system, are currently exploring the possibility of

establishing an international student cohort. This plan is only in the awakening stage (Cawsey et

al., 2016); however, given the number of staff voluntarily completing the GCAA (Global

Competence Associates, n.d.), this initiative has significant interest. Employees who believe that

bringing international students to our system is a viable way to take the necessary steps to meet

the strategic planning goals of our leadership teams will likely be champions for this program.

These champions may also see the value in providing international context to our staff and

students through the development of an international teacher–student exchange program.

Numerous staff members have expressed an interest in the possibility of participating in an

exchange. This interest in international exchange may indicate that these staff members may be

champions of our international exchange program.

Supports and resources. The resources needed to provide the support required for this

work to be done are substantial, yet simple. The major resources needed are time and

information. Simply put, it will take time and information in order for APCS to move from the

acceleration stage to the institutionalization stage (Cawsey et al., 2016). The primary type of

information required will be determined by which model of global competency APCS uses to

develop the curriculum needed to make the programming changes. For example, staff will need

to be provided with professional development that would define and provide consistency across

our system as to what model of global competency we would be teaching and learning. We are

reminded by research that defining and assessing global competency is not a simple task

(Deardorff, 2004, 2006, 2011; Hunter et al., 2006; Morozova, 2016). The suggested models of

the pyramid model of intercultural competence (Deardorff, 2006) and the OECD's (2018)

dimensions of global competence may provide, if adopted, the primary sources of outcomes and

essential skills that will need to be taught. The GCAA (Global Competence Associates, n.d.) may

augment the learning of our students as a standardized and proven measurement of global

competency. These are the key sources of information that will need to be understood by those

who champion the internationalization of APCS.

  If these models are established as the informational resources needed, the second most

significant resource needed will be time. In the past, APCS has used its teachers as the driving

force for change within the system. That approach, however, takes significant time. For example,

APCS is currently developing a system-wide assessment framework, a project that will be

completed in just under four years. Bridging the gap between the current and desired

organizational state, APCS will once again have to mobilize those staff members who are

champions of the proposed change. In order to care for the professional relationships during the

change process, a principle of servant leadership (Greenleaf, 1977; Liden et al., 2008), the time

spent by stakeholders working to facilitate this change, will have to be honoured. In many cases,

this will mean relief from current teaching or administrative duties, which comes with a financial

cost. The system would pay for relief teachers to cover for staff who have stepped forward to do

the required work and put in the time (precedent has been set by past initiatives), which will be

the primary financial investment needed to make the suggested changes. Financial resources will

be required to recruit international students and provide the opportunity for exchanges, but those

costs would be supplemented by the tuition the participants in our international programs will

incur and should not create any substantial financial strain on the system.

  Implementation issues. Many implementation issues may arise; in this section I discuss

stakeholder consultation, resistors, curriculum, and programming changes. Using the four frames

of leadership (Bolman & Deal, 2017) provided in the Change Climb, issues that arise can be

analyzed and solutions derived through the shared knowledge and language that the frames

provide. For example, issues related to a proposed change to our character education and

leadership program curricula can be broken down by the frames that those changes affect. The

resisters of this change may be influenced using the symbolic frame (Bolman & Deal, 2017) as

we celebrate reaching the goals and milestones of the change process. The human resource frame

(Bolman & Deal, 2017) may be used as we take care of the stakeholders who will be asked to

make the curricular changes and convince resistors of the value of this change by becoming

champions. The structural frame (Bolman & Deal, 2017) will also need to be used to create the

plan and make the arrangements needed to change the curricula. Course content and names may

be changed, schedules adjusted, and system-wide scope and sequence attuned to provide the

scaffold for the possible changes to programming. I am confident that these implementation

issues, and any others that may become apparent during the change process, can be overcome if

those who are involved are committed to using the proposed model of change in Chapter 2, the

Change Climb (see Figure 5), and leadership models it contains. In the past, APCS has

efficiently managed changes to its programs and applied new educational reforms while

navigating the pitfalls and barriers of the change process.

   Building momentum. During the change process, a number of short- and long-term

goals and milestones will allow APCS to build and maintain momentum. Some of these

milestones have already been achieved or passed, creating significant momentum. For example,

APCS has been approved for a research grant to determine the degree of global competency

already present. Since that application, a number of steps have been taken to begin this process.

Partnerships with two post-secondary institutions, another public school in Alberta, and an

international school in China have created excitement within the team that was working on the

research grant. The meetings and confirmation of the process, the ethics commission approval,

and the rollout of the GCAA (Global Competence Associates, n.d.) to staff participants have all

been small milestones that have created momentum. Sometimes milestones can be unexpected.

Once the administration at the high school and the superintendent had completed the GCAA, a

number of other campus and central office staff asked to complete it. Due to the interest, the

GCAA was made available to all staff at the high school, where all Grade 9 students and core

teachers will be competing the assessment as well.

A number of milestones have been reached concerning the possibility of an international

student cohort at APCS high school. The inclusion of an international cohort of students at APCS

high school, and what barriers and conditions may exist for their matriculation, have already

been discussed at the system level. A representative of APCS will attend an international

recruiting conference to gauge interest and possibility for the 2019–2020 school year.

A number of short-, medium- and long-range goals will also help measure the change

progress and build momentum towards the desired organizational state. I believe the short-range

goals lie in the realm of decision-making and defining. Small steps, such as defining what is

meant by "global competency" and "international context," may have lasting effects on the

ability of the organization to measure and evaluate the actual progress. Other decisions will need

to be made as to what reforms are needed at the K–4 level, and how to transition students during

the middle school years of Grades 5–8, so they are ready to participate in the more rigorous

leadership curriculum of Grades 9–12. These decisions would need to be made with an

understanding of global competency scope and sequence from K–12.

These are important decisions to provide direction for the more significant and time-

consuming medium-range goals. Perhaps one of the most important of these medium-range goals

is to reach the global competency tipping point within our staff. This would entail a significant

number of our staff completing the GCAA (Global Competence Associates, n.d.)—50% of the

high school staff have already done so—and then pursuing the professional development

required to be considered globally competent. By the end of the current school year, it is possible

that almost half of the high school staff and central office will have completed the GCAA. Once

those assessments are complete, we will have to see how long it takes for those interested to

pursue the professional learning required. The final long-range goal of graduating students who

could measurably be considered globally competent will be accomplished only if the

intermediate goals of a solid global leadership curriculum and international context are created,

established, and put into practice.

Acknowledging limitations. Although there are many limitations within this

organizational change, the current leadership team and expertise within the staff give APCS the

capacity to overcome them all. The primary solution of developing a K–12 program that teaches

global competencies, and is taught by a globally competent staff, has challenges that may be

overcome by having a keen understanding of the scope and priorities that accompany this

change. Below is a description of two limitations that may arise during the Change Climb.

Scope. One of the primary limitations of this change is scope and how that scope relates

to time. Establishing global competencies as a focus in a K–12 public school system is a

significant task. I believe it is a goal that is attainable, especially at APCS with its solid change

structures and past experience, but it will take significant time to reach the level of

institutionalization (Cawsey et al., 2016) that other change initiatives have reached in our

organization. We are currently a public charter school known for our character education,

leadership focus, academic excellence, and parental partnerships. Complete institutionalization

may manifest itself in global competency being included as one of the pillars of the school. That

would take a substantial amount of time, considering there has rarely been additions or changes

to the focus of our charter since the school's inception in 1997. Perhaps that is not the final goal,

but it may be in the best interests of the organization, and perhaps it is time to adjust the brand of

APCS. The resistance to change may be substantial, and the time it would take to complete this

type of change significant. It will be important to maintain the connection with the Change

Climb framework, and all of the change and leadership models it entails, to provide the support

needed to manage such a significant change.

Priorities. The long-term priority is to graduate students who have had the opportunity to

become globally competent. As with some of the challenges mentioned above, this process may

take an extensive amount of time. The answer to slowly moving in the direction of a globally

competent graduate profile is to prioritize the appropriate tasks and goals in order to take the

steps needed to place the organization on the right trajectory. The first priority associated with

the solution of global education may be a globally competent staff. In the previous section on

momentum, I stated that APCS is reaching a tipping point with global competence on our staff. I

believe that the number of staff wishing to complete the GCAA (Global Competence Associates,

n.d.) shows a natural interest in global competencies. I have also had conversations with staff

regarding their interactions with other professional fields that are prioritizing global

competencies. Prioritizing this professional learning is aligned with other professions outside of

the educational landscape, highlighting the precedent for global competencies to be prioritized

within APCS's change process.

A second priority would be to complete the changes or adjustments to the current

programming at APCS. Within the possible programing changes are two significant changes to

our curriculum that may be part of the move to the desired organizational state. The high school leadership curriculum will need to be redesigned. The current courses, entitled Leadership with Character, will need to be renamed and deconstructed to provide the learning needed to allow our graduates to be considered globally competent. This change will take a significant amount of time and effort from the leadership teaching team at the high school. The second curricular change would be to revisit our K–12 character curriculum, a system-wide endeavour that would entail a significant amount of time and human resources. The timing for this change, however, is impeccable. Both the leadership curriculum at the high school and the system-wide character curriculum have not been revisited for over seven years. It is time for a change. Why not change in the direction of global competencies?

Change Process Monitoring and Evaluation

A method of measuring progress will be needed to monitor and evaluate where APCS is located within the change process. The Plan-Do-Study-Act cycle was considered as a possible model for monitoring and evaluating the change process, understanding that this model is a proven technique for measuring progress and evaluating effectiveness. However, as a small charter school, we have been able in the past to respond and implement changes to our programing more quickly and efficiently than a larger traditional public school system. For example, when legislation was passed regarding the implementation of gay–straight alliances, APCS High School administrators discussed it, met central office leadership, proposed a program with appropriate staff, and implemented a staff- and student-led program that provided a safe place for interested students to meet and support one another. We pride ourselves on being nimble and adapting to the educational landscape.

As a monitoring and evaluating system that may be more appropriate to a smaller, more

agile school system, the Lean Startup methodology (Lean Startup Co., n.d.) is the proposed

model for measuring change and its effectiveness at APCS. Ries (2012) originally designed this

methodology to improve the success rate of entrepreneurial start-up companies and products.

The Lean Startup methodology has since been applied to various other professional fields such as

healthcare (Silva, Calado, Silva, & Nascimento, 2013) and education (Wilka & Cohen, 2013) to

measure innovation and improvement, and it has been adopted as curricular content in many

university business programs (Blank, 2013).

Ries (as cited in Lean Startup Co., n.d.) defined a start-up as "a human institution

designed to create a new product or service under conditions of extreme uncertainty" (Eliminate

uncertainty section, para. 1). By this definition, organizations, educational or otherwise, act as a

start-up each time they introduce a new service that is intended to meet the needs of their clients.

In the case of public charter schools, the "clients" are the students and their parents who have

decided to send their child to a specific school of choice. The Alberta public charter schools are

lean systems, costing the taxpayer approximately $4,200 fewer dollars per student, per year, than

other public school systems in Alberta (MacPherson, 2018), and achieving high results according

to the Fraser Institute (Cowley & Easton, 2018). It is appropriate to measure progress in a

manner that reflects the values and characteristics of the organization. With its focus on

measuring and learning as quickly as possible, the Lean Startup methodology may be the

appropriate model for measuring progress at APCS.

The Lean Startup has three key components: build, measure, and learn (Ries, 2012). The

process begins when a problem that needs to be solved is established, and an MVP or service is

created to solve that problem that is subsequently provided to the client (Ries, 2012). In the case

of educational institutions, the service would be interventions, reforms, and/or program changes.

Once the MVP has been implemented, a series of measurements are taken to learn as much as

possible about the effectiveness of the service. After the data have been collected and analyzed,

the decision is made to pivot or persevere. If the data bring to light significant issues with the

service, then the decision is made to pivot or change the service. If the evidence suggests that the

service is working efficiently, then the organization may decide to persevere, which may include

refining or fine-tuning parts of the service to allow for "maximum acceleration" (Lean Startup

Co., n.d., para. 1).

Using the Lean Startup methodology allows the organization to be in a constant cycle of

"build-measure-learn" (Lean Startup Co., n.d., Develop an MVP section, para. 1). As it applies to

the organizational changes proposed to APCS, the Lean Startup methodology could be

deconstructed as follows. The first stage of the Lean Startup methodology is to establish the

problem that needs to be solved. As stated earlier in this OIP, the POP is the lack of global

competencies taught, and international context provided, at APCS. Each of the solutions, as

described in the previous chapter, used to move the organization closer to the desired state of a

highly effective international public school could be considered an MVP. For example, the

changes made to the leadership curriculum at the high school, the introduction of professional

development and learning allowing staff to become globally competent, the use of the GCAA

(Global Competence Associates, n.d.) to measure global competency, the creation of an

international student exchange program, and the strategic partnerships with external

organizations could all be considered "products." Each one of the solutions could be

implemented in MVP format, meaning that the solution does not need to be perfect, but it must

be measurable, and the organization must be able to learn from its implementation.

In the second stage, the Lean Startup process measures the effectiveness of the MVP by consulting and gathering data from organizational stakeholders to decide if APCS should pivot or persevere (Lean Startup Co., n.d.). Wilka and Cohen (2013) used specific tools to measure the improvement in Summit Schools, a charter school system based in California and Washington state. Here, the data were collected weekly to inform their Lean Startup methodology as they implemented a blended learning approach to their school. The three tools used were student survey data, student focus group data, and student performance data (Wilka & Cohen, 2013). APCS currently uses student surveys and performance data, but it takes student surveys only once a year and analyzes performance data based on the standardized testing in Alberta.

Using the same strategies of Wilka and Cohen (2013), APCS could measure the success of the suggested solutions with a combination of surveys, focus groups (APCS would also reach out to parents and alumni), and performance data. The triangulation allows for greater weight and evidence when considering the future direction of the organization. The various methods of gathering data and the extension of the surveys to a broader spectrum of stakeholders may allow for greater accuracy when pivoting or persevering.

If the Lean Startup is to be implemented, APCS may need to commit to measuring on a more frequent basis. If technology is used, it may be possible to complete both student surveys and performance measurements with increased frequency. It may also be important to employ a type of stakeholder focus group measurement as a way of collecting more anecdotal data on the level of global competency in our staff and students. There is an added benefit to the face-to-face nature of the focus groups: APCS could establish them not just with students but also with staff, parents, or even community members. Understanding that a core value of APCS is parental partnership, it would be wise to include their feedback in the data that are collected. Focus group

conversations on measuring global competency may promote the characteristics of balanced

processing and relational transparency that are foundational to authentic leadership (Avolio et al.,

2009; Duncan et al., 2017; George, 2003) and align well with the relationship building,

community value, and empowering characteristics of servant leadership (Greenleaf, 1977; Liden

et al., 2014).

During the third stage of the Lean Startup, the information and data are analyzed for

lessons learned. The unit of measurement used in the Lean Startup is validated learning (Lean

Startup Co., n.d.)—learning with the support of data and evidence. In the case of APCS, due to

its implied model of distributed leadership (Gronn, 2000, 2002, 2008, 2016; Harris & Spillane,

2008; Orlina & Spillane, 2005; Spillane et al., 2001), it may be appropriate to involve multiple

levels of stakeholders in the validated learning. One tension that may arise is time. Involving

stakeholders in the analysis means the build-measure-learn process may take more time, and the

entire Lean Startup method is designed to move quickly. A solution to this problem is to

strategically involve only the appropriate stakeholders. For example, the curriculum

programming changes to the leadership courses at the high school could involve only the

instructors in the validated learning, but may involve students and parents in the building and

measuring portion of the process. This approach would allow for efficient measuring of the MVP

via the surveys or focus groups of the affected stakeholders, and an effective analysis of the data

by the professionals who will be delivering the program.

The advantage of the Lean Startup methodology (Lean Startup Co., n.d.) to APCS is the

constant state of adjustment and communication, and the refining of programs and changes may

be more embedded within the community and promote involvement and ownership from our

stakeholders. With the learning complete and the changes, if any are necessary, made to the

MVP, the cycle can continue and the process of continual improvement goes on. The Lean

Startup methodology allows for this to become institutionalized (Cawsey et al., 2016) and creates

a culture where tracking changes, gauging progress, assessing change, and refining

implementation becomes the norm.

Tools for Measuring Effectiveness

The first stage of measuring effectiveness is defining what is to be measured. Global

competency assessment "begins with a clear definition and framework derived from the

literature, translated into concrete, specific goals and student learning outcomes" (Deardorff,

2015, p. 143). Building off the GCAA (Global Competence Associates, n.d.) as a standardized

assessment of global competency, APCS could also employ a number of tools to use within the

Lean Startup methodology. Deardorff (2015) has suggested that a "multi-measure, multi-

perspective approach" (p. 137) be adopted to get the complete picture, and she proposed a

number of types of assessments that would assist in this endeavour. Assessment methods such as

instructor evaluations; e-portfolios; interviews with students; student journals, blogs, and

reflections; and student presentations (Deardorff, 2015) are all currently in use in our leadership

program, and could be adapted to reflect the global competence outcomes achieved by our

students. These measures could then be analyzed within the Lean Startup methodology (Lean

Startup Co., n.d.) to decide whether the program needs to pivot or persevere. The various

proposed assessments can be categorized by frequency, stakeholder participation, and type (see

Table 1) to help establish who will be involved, how fast the feedback will be received, and what

changes will be made.

Table 1

Global Competency Assessment Method, Frequency, Participation, and Type

Assessment method	Frequency	Stakeholder participation	Type
Instructor evaluations	Bi-weekly	Teachers	Summative and formative
Self-evaluations	Bi-weekly	Students and staff	Formative
Peer evaluations	Bi-weekly	Students and staff	Formative
E-portfolios	Course end	Students and teachers	Summative and formative
Journals, blogs, or reflections	Monthly	Students and staff	Summative and formative
Interviews	Bi-monthly	Teachers, students, and parents	Summative and formative
Student presentations	Bi-monthly	Students and teachers	Summative and formative
GCAA	Bi-annually	Staff, students, parents, and administration	Formative

These measurements can be completed across the spectrum of stakeholders, keeping in

mind that the primary measurement would remain the students and that the long-range goal is to

graduate students who are globally competent. For students, these assessments could be both

formative and/or summative. Burke (2010) articulated a clear distinction between the two types

of assessment. Formative assessment is consistent and specific feedback designed to improve

student learning and is not graded, whereas summative assessment is used to judge what a

student has learned and is typically graded. When paired with the standardized nature of GCAA

(Global Competence Associates, n.d.), a clearer picture of the level of global competence may be discernible, and changes to the assessment and programing can then be made.

The Lean Startup methodology (Lean Startup Co., n.d.) may be an effective way for APCS to measure its progress from the current to the desired organizational state. However, it will only be as effective as the organization is at defining and implementing the tools and measures it decides to use. The use of stakeholder consultation and input will be paramount in meeting the expectations of our organizational culture. Relying on the build-measure-learn model, and creating MVP-type changes that are measurable with the tools proposed, will allow APCS to gauge process and assess change quickly and efficiently. It will minimize the time it takes to refine and accelerate the process and may allow APCS to reach the institutionalization (Cawsey et al., 2016) of global competency and international context as quickly and efficiently as possible. The Lean Startup methodology creates the potential for proficient and meaningful change for educational organizations that are willing to immerse their stakeholders in the process while communicating and listening genuinely to their feedback.

Plan to Communicate the Need for Change and the Change Process

This OIP outlines a number of solutions and recommendations for solving a specific POP. The POP to be solved is a lack of global competencies taught and international context provided at APCS. These solutions will need to be communicated and implemented in a manner that allows for consistent feedback and engagement. Continuing to rely on the Lean Startup, which is a constant cycle of build-measure-learn (Lean Startup Co., n.d.), will allow the organization to communicate and improve simultaneously. In this section I discuss four possible levels of stakeholders where awareness and need for change may be planned and communicated: the students, parent community, staff, and school and system leadership. Communication

methods may overlap; however, a plan for each level of stakeholder is provided. I propose

different strategies and communication techniques for each of the four levels of stakeholders and

the possible questions and responses considered. Each of the four levels will also play a role in

communicating to other community members. Stakeholders may be leveraged in the process of

communicating milestones and successes to build momentum and support for the change.

Communicating to these four levels of stakeholders will allow APCS to reach the majority of the

community during the change process, some of which has already begun. Below is a breakdown

of the communication plan for each level explaining the methods of communication, the

frequency, the type of messaging, and how the plan may be used to communicate to other

stakeholders.

   Students. Communicating the need for change will be a priority for those leading the

change process at APCS. The students will need to understand why the move to a more

international context and the teaching of global competencies is in their best interests. Framing

the issues to help students understand why it is advantageous to become globally competent will

not be difficult. The evidence to support employers' desire to hire globally competent employees

is clear (Hunter et al., 2006), and the alignment between global competencies and character

education seems to make for an easy transition. The plan to communicate to students may be

simple and consistent. Table 2 outlines the various methods of communication, their frequency,

and possible types of messaging.

Table 2

Possible Student Communication

Communication method	Frequency	Messaging
Administrative town halls	Each semester	Introduction, updates, and milestones
Education management tool	As needed	Course notification
Announcements	Daily (as needed)	Events, updates, and milestones
Leadership teacher communication	Ongoing	Global competency outcomes and assessments
Career counselor	Monthly	Global career direction
Central office newsletter	Monthly	External direction, international programing, events, and updates
School newsletter	Monthly	School events, international programming, events, and updates

Students may also be used as a primary source of communication. Change agents in our student community may be encouraged to send messages about our international programming. For example, senior students or alumni may speak at town halls, write an article for a newsletter, perform announcements, or give testimonials in class concerning the opportunities that have arisen from being more globally competent. They may have experienced new levels of influence in their communities and may be willing to share their learning at staff development events or parent meetings, or as representatives of our organization externally. In the past we have observed significant weight or power associated with these messages when they come voluntarily from the students who have participated in the change process or the program itself. This type of communication may not be available until students have experienced the proposed

change. However, as previous chapters have indicated, the contextual distributed leadership

model (Gronn, 2000, 2002, 2008, 2016; Harris & Spillane, 2008; Orlina & Spillane, 2005;

Spillane et al., 2001) extends to our student population, and the students involved may

participate in the communication of the need for change or the change process itself, as well as

enjoy the advantages of global competency education and international programming.

Parent community. Communicating with our parent and community stakeholders may

require a different strategy. The majority of the families that send their students to APCS are

first- or second-generation Canadian. We know this because of the vast spectrum of languages

(APCS Board of Directors, 2016) that are spoken in our school; the diversity in our high school

is one of our greatest strengths. The questions that may arise from our parent community are

likely to be in regard to how these changes are going to improve their child's future. Many will

specifically ask about college or university entrance or employability. Due to our parents' focus

on the practical application of global competency, the strategy and tactics for them will differ

from the communication plan for other stakeholders. I believe we must focus on two key

elements when communicating the need for change and the change process to our parent

community.

First, the parent community will need to be convinced of the practical value that focusing

on global competencies will add to their child's future. Many of their questions may pertain to

the idea of increasing the likelihood of attending university, or attending university overseas.

Relying on sources such as Hunter et al. (2006) and Deardorff (2006), and statistics from

UNESCO (2013) and OECD (2018), may help to convince parents of the real advantages gained

by being globally competent. A concentrated effort will need to be made to communicate clearly

and genuinely concerning the value of the outcomes of this program to the individual students

and their families. Without this advantage of global competencies communicated to parents, the

change process may become stunted due to resistance from this stakeholder group. There may

also be a decrease in enrollment or in the number of students on our wait list due to the change of

focus without a clear communication of the value of the change.

Second, the altruistic value of the change and the connection to the current charter

direction of character and leadership training will need to be made clear. Aligning global

competency and international context to our charter has political and symbolic frame (Bolman &

Deal, 2017) ramifications within both our geographic and our parent community. We would be

remiss not to have a clear alignment with our character and leadership programing. These are

foundational to our charter, and this OIP is not recommending significant changes to the charter

or its direction. Communicating the alignment between the internal outcomes (Deardorff, 2006)

and the character curriculum that already exists will create clear connection to the foundations of

our charter and may also persuade our parent community of the value of the proposed changes.

Within our parent community is a core group of parents who have chosen to send their child to

APCS for our character and leadership programs. This alignment will need to be communicated

clearly if we hope to have the full support of our parent community, both those who may

prioritize the practical advantages and those who may believe in the moral value of global

competencies and international context.

Communicating with these two groups equally will be critical. Our current

communication methods, as well as strategies that have been used to communicate change

initiatives in the past, can be used in a number of ways. Table 3 describes the proposed methods,

frequency, and messaging to communicate with our parent community.

Table 3

Possible Parent Communication

Communication method	Frequency	Messaging
Parent orientation	Annually	Introduction, practical and altruistic value
School council meetings	Monthly	Events, updates, and milestones
Parent teacher conferences	Quarterly	Updates, Q & A with teachers and administration
Central office newsletter	Monthly	External direction, international programing, events, and updates
School newsletter	Monthly	School events, international programming, events, and updates
Town halls and stakeholder consultation	Quarterly	Stakeholder focus groups; Q & A with board, administration, and leadership
Campus communication (email, educational management tool)	As needed	Events, updates, and milestones

Having parental partnership as one of our core values means that our parent community is extremely involved. In the past, we have consulted directly with our parent community regarding any significant changes. This process will need to continue; for example, it may be wise to provide a venue for parents to meet and discuss the proposed changes with other parents and school leadership consistently throughout the change process. We have completed these types of meetings in the past with varying degrees of success. Due to the nature of the proposed changes, learning from previous mistakes and building on successes will be key. The communication will need to be persuasive yet informative, communicating the value of global competencies and international context while allowing for questions and feedback. Communicating the changes

proposed, and the change process itself, to our parents will be important to allow for efficient

movement from the current to the desired organizational state. Our parent community could be

our greatest ally or our greatest opposition to change. Communication and collaboration,

specifically with this stakeholder group, are key.

       Staff. We will need to communicate with two distinct groups of staff concerning the

proposed changes at APCS. Each is important to the change process for different reasons. The

first is general campus staff, including both instructional and support staff. Support staff include

any staff member who is not a certified teacher—from custodian to school psychologist.

Instructional staff include any teacher who is not teaching global competencies through our

leadership program. The second group that will need distinct communication is the instructional

staff who will be explicitly teaching global competencies at APCS. Both groups will have

specific needs to be met in order for them to understand the need for change and the change

process.

       General staff. Communication with the general campus staff will be important to keep

members of our community engaged in the proposed changes. Due to the history of our system

making changes based on research and data, staff may recognize the value of teaching global

competencies or providing international context on their own. The possible barrier with this

group will be ensuring that everyone feels heard and consulted, a product of our implied

distributed leadership (Gronn, 2000, 2002, 2008, 2016; Harris & Spillane, 2008; Orlina &

Spillane, 2005; Spillane et al., 2001). Due to this possible challenge, the primary medium for

both the staff member groups will be face-to-face conversation (see Table 4). This approach will

allow those who have questions or queries to ask them directly. These conversations will be had

with individuals, teams, departments, and with the entire campus staff. They will be led primarily

by the school leadership team, but may also be led by other teachers, department coordinators, or

support staff if the opportunity arises and it is deemed appropriate.

Table 4

Possible General Staff Communication

Communication method	Frequency	Messaging
Staff meetings	Weekly	Introduction, practical and altruistic value, teacher Q & A
Department coordinators meetings	Bi-weekly	Program updates, opportunities, coordinator Q & A
Team meetings	Monthly	Events, updates, and milestones
Formal individual meetings	As needed	Updates, Q & A
Informal meetings	Opportunistically	Updates, Q & A

Table 4 indicates that some individual meetings may be completed as needed or

opportunistically. This style of communication may be the most time consuming and the most

important. Teachers will have questions that need to be answered. In the past, administration has

met formally with every staff member to address change, follow-up meetings done informally or

formally as needed. With the progress that has already occurred with the proposed change,

meetings with every member of the staff may not be necessary, but will be made available.

Resistors and champions (Cawsey et al., 2016) may also be targeted for conversations to allow

them to ask questions and voice concerns. These meetings may be done formally or informally

depending on the staff member and the relationship that person has with the leadership team.

Questions are very difficult to predict, but providing an opportunity to have those conversations

both formally and informally will allow for all teachers to be heard, especially those who do not

wish to speak up in front of the entire campus. Those questions are often the most important to

be answered.

Not included in the general staff communication is the central or campus newsletter; this was a deliberate omission. Experience and research would dictate that face-to-face communication with staff concerning updates, events, and milestones will take care of relationships (Greenleaf, 1977; Liden et al., 2014) and create transparency, congruency, and trust (Avolio et al., 2009; Duncan et al., 2017). Hearing of changes communicated by central office or via newsletters may make staff feel marginalized and may make decisions seem hierarchical, even when they are not.

Global competency teachers. These staff members will have all the opportunities provided to general staff, but additional communication will be needed for those who are teaching global competencies explicitly. The additional communication will concern the possible professional learning and development these teachers may require. It will allow for a more in-depth understanding of the global competencies and international context. The hope is that these teachers become proponents of the proposed change and communicate both the practical and altruistic value of the program (see Table 5).

Table 5

Possible Additional Communication for Global Competency Teachers

Communication method	Frequency	Messaging
Team meetings	Monthly	Introductions, practical and altruistic value, global competency discussions, response to the GCAA, opportunities, events, updates, milestones, Q & A
Formal individual meetings	As needed	Updates, Q & A
Informal meetings	Opportunistically	Updates, Q & A

These additional team meetings for the teachers involved in the global competency

program will allow for in-depth questions and discussions that other staff may not need or be

interested in. For example, all staff who will be teaching global competencies explicitly will be

asked to complete the GCAA (Global Competence Associates, n.d.). This provides an

opportunity to discuss and answer questions around the building and implementation of

curriculum, assessment of global competencies, teaching methods, and pedagogy based directly

on the primary assessment tool to be used to measure the level of global competency in our

students. Other staff members may not need to be a part of these in-depth conversations, and

including them may show a lack of respect for their time. This in-depth, face-to-face

communication is key to the success of the change process. It allows for feedback and ownership

from those most closely involved with the students in the program. Staff members who do not

participate in these conversations will be present at staff meetings, events, and professional

development sessions where the more involved staff may share their perspectives and learnings.

These learning opportunities may allow for more engagement from staff who are on the

periphery or not directly involved with the explicit teaching of global competencies.

     Campus and system leadership. Campus and system leadership teams will be the

primary communicators of the change process. The leadership teams were the first to be

informed of the possible change and were the first to adopt global competencies as a focus for

strategic planning. Both the board of directors and administrative council have adopted global

competency as a focus for the coming years; they will be the primary champions for this change.

The majority of the methods of communication noted in Tables 2–5 will be facilitated by

members of either the campus or the system leadership team. As champions are found, the

responsibility for each method may be delegated in order to communicate the change or change

process more efficiently. For example, team meetings may be handed over to a staff member, or

staff may speak at a parent orientation meeting, write articles for the newsletter, or speak to our

school council. The focus of the leadership team, besides communicating directly to students,

staff, and parents, will be to recognize champions and maximize their effectiveness.

An important portion of leadership's work will be to recognize resistors and use them as

an opportunity to strengthen the change process. Within highly effective organizations, resistors

are typically not just being obstinate; rather, they have legitimate questions and concerns

regarding the change or change process (Cawsey et al., 2016). Strong leadership will see this

resistance as an opportunity to reinforce the proposed change by answering the resistors'

questions and persuading them that the proposed change is in the best interests of the students

and the organization. It will be important to do this in a manner that honours the principles of

authentic and servant leadership; specifically, it will need to be transparent and based on a

balanced process of evidence and data (Avolio et al., 2009; Duncan et al., 2017). This approach

will nurture the relationship with resistors, let them know they are valued, create trust, and

empower them while they grow and learn (Greenleaf, 1977; Liden et al., 2014). A summary of

the change process communication plan is included in Appendix B, Table B1.

Conclusion, Next Steps, and Future Considerations

Within this chapter is an outline of the plan to implement, evaluate, and communicate the

proposed change of teaching global competencies and providing international context at APCS.

In the change implementation plan, clear direction is given to manage the transition that

addresses the issues of understanding stakeholders, selecting champions, gathering supports and

resources, handling implementation issues, building momentum, and acknowledging the

limitations. The Lean Startup methodology is presented as a means to monitor and evaluate the

change process in a way that allows for nimbleness and maximum acceleration (Lean Startup

Co., n.d.). In the last section of the chapter, a detailed plan for communicating the need for

change and the change process is offered. It describes the methods, frequency, and messaging

that may be used to communicate to the major stakeholder groups at APCS: students, parents,

and staff. Chapter 3 describes a detailed plan for the implementation, evaluation, and

communication of the contextual change process proposed to move APCS from its current

organizational state of being a highly effective public school to the desired organizational state of

becoming a highly effective international public school.

As alluded to in this OIP, many of the proposed changes are already being pursued. The

GCAA (Global Competence Associates, n.d.) has already been distributed to the teachers who

may be teaching global competencies within our high school, and travel is planned to recruit a

small cohort of international students for the fall semester. I believe that the proposed change is

in the best interests of our students, our organization, Alberta public charter schools, and the

greater educational landscape in general, both pragmatically and altruistically. My hope for the

future is to reach the desired organizational state regardless of my direct involvement or the use

of this OIP. I know through my agency and influence that sections, theories, and ideas within this

OIP will be a part of the change process—they already are. However, my ego is not attached to

the plan, but rather to the change itself. Below are three possible next steps that APCS could take

if the desired organizational state is achieved.

The Government of Alberta (2011) has stated that the "original purposes of creating

charter schools was not only to support and encourage educational innovation, but also to

disseminate the results of research conducted in charter schools more broadly across the Alberta

education system" (p. 2). If the desired organizational state is attained, one next step is to

disseminate not only the structures and programs that allow APCS to be considered a highly

effective international public school, but also the research, innovation, and processes that got us

to that state. Charter schools in Alberta are expected to share what makes them distinct with the

greater educational community.

  Another step for APCS may be to partner with or establish its own consulting agency to

give teachers and administrators the support and structure needed to share their innovative

practices and procedures locally, provincially, nationally, and internationally. The hope would be

that two of the topics APCS could share with other schools and jurisdictions would be (a) how to

develop and implement a program of teaching and learning global competencies and (b) how to

provide international context at a publicly funded school.

  In the future, APCS has the potential to become a highly effective international public

schools in the western hemisphere. Within Alberta, most public school jurisdictions have

international students. There are accessible teacher exchange programs that some of our teachers

have already taken advantage of. However, the potential that lies within APCS is a combination

of all these initiatives within a school that already has an established character curriculum, holds

a record of academic excellence comparable to the top private schools, and is about to explicitly

teach the skills needed to thrive in a global market. Establishing this program would level the

playing field for those who would not have access to a program such as this within the current

public system. A possible next step would be a clear articulation of the desired organizational

state by revisiting the charter and rebranding the school appropriate to the teaching and learning

of global competencies and the international context provided.

  The current educational landscape reserves much of the high achieving international

education domain for private schools. One of the next steps may be to encroach into this private

school landscape to even the playing field for those who do not have access to the financial resources that would allow them to attend an international private school. The public school system, with charter schools and other alternative programs as components, may be able to satisfy the learning needs of all citizens other than those who want a religious education and the wealthy. By allowing for the creation of public schools that provide international programming and global competency education in a highly academic environment, as well as other specific educational models, public systems can compete with private schools while not needing to charge tuition and at no increased cost to the taxpayer. Such a model would limit the need to fund private schools at all, which is still occurring in Alberta. It is a lofty but attainable next step.

The development of this OIP has provided me a platform to grow and learn as a leader. Over the past three years I have had the opportunity to learn and discover the world of international education, not just statistics and information about international achievement levels and school demographics but how difficult it is becoming to separate the world of international education from our own local educational landscape. The diversity that Albertan and Canadian schools provide creates an exciting opportunity for us to educate our students for their global future.

I believe this program has also given me the opportunity to develop skills that would allow me to lead organizations, educational or otherwise, through the different stages of the change process, regardless of the models, theories, or frameworks used. An exciting prospect has arisen: the possibility of working and consulting with other organizations as they learn and grow, navigating their way through change. I hope I may become someone who facilitates these changes and in turn have a positive impact on teaching and learning for a broader spectrum and greater number of students and teachers.

Finally, this program has allowed me to analyze my own leadership in depth. Over the three years I have narrowed down why I lead the way I lead and what theories and models align, or do not align, with my own leadership. I have begun to notice confidence in myself and my leadership that was not there before. Much of this learning comes from the knowledge acquired through discussion posts and academic assignments I have completed over the course of this program. However, as much, if not more, of my learning can be attributed to the conversations and relationships I have developed with my colleagues and instructors. I have always believed that leadership is directly connected to our ability to develop authentic relationships that serve a greater purpose. This program has cemented that belief for me.

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Appendix A: Readiness for Change Questionnaire

Rate the Organization's Readiness for Change: Readiness for Change Questionnaire

Readiness Dimensions	Readiness Score	APCS Estimated Score
Previous Change Experience		
1. Has the organization had generally positive experiences with change?	If yes, Score +1	1
2. Has the organization had recent failure experiences with change?	Score -1	0
3. What is the mood of the organization: upbeat and positive?	Score +1	1
4. What is the mood of the organization: negative and cynical?	Score -2	0
5. Does the organization appear to be resting on its laurels?	Score -1	0
Executive Support		
6. Are senior managers directly involved in sponsoring the change?	Score +2	2
7. Is there a clear picture of the future?	Score +1	0
8. Is executive success dependent on the change occurring?	Score +1	1
9. Has management ever demonstrated a lack of support?	Score -1	0
Credible Leadership and Change Champions		
10. Are senior leaders in the organization trusted?	Score +1	1
11. Are senior leaders able to credibly show others how to achieve their collective goals?	Score +2	2
12. Is the organization able to attract and retain capable and respected change champions?	Score +2	2
13. Are middle managers able to effectively link senior managers with the rest of the organization?	Score +1	1
14. Are senior leaders likely to view the proposed change as generally appropriate for the organization?	Score +2	2
15. Will the proposed change be viewed as needed by the senior leaders?	Score +2	2
Openness to Change		
16. Does the organization have scanning mechanisms to monitor the environment?	Score +1	0
17. Is there a culture of scanning and paying attention to the scans?	Score +1	0
18. Does the organization have the ability to focus on root causes and recognize interdependencies both inside and outside the organization's boundaries?	Score +1	1
19. Does "turf" protection exist in the organization?	Score -1	-1
20. Are the senior managers hidebound or locked into the use of past strategies, approaches, and solutions?	Score -1	0

21. Are employees able to constructively voice their concerns or support?	Score +1	1
22. Is conflict dealt with openly, with a focus on resolution?	Score +1	1
23. Is conflict suppressed and smoothed over?	Score -1	0
24. Does the organization have a culture that is innovative and encourages innovative activities?	Score +1	1
25. Does the organization have communication channels that work effectively in all directions?	Score +1	0
26. Will the proposed change be viewed as generally appropriate for the organization by those not in senior leadership roles?	Score +2	2
27. Will the proposed change be viewed as needed by those not in senior leadership roles?	Score +2	0
28. Do those who will be affected believe they have the energy needed to undertake the change?	Score +2	2
29. Do those who will be affected believe there will be access to sufficient resources to support the change?	Score +2	2
Rewards for Change		
30. Does the reward system value innovation and change?	Score +1	0
31. Does the reward system focus exclusively on short term results?	Score -1	0
32. Are people censured for attempting change and failing?	Score -1	0
Measures for Change and Accountability		
33. Are the good measures available for assessing the need for change and tracking progress?	Score +1	1
34. Does the organization attend to the data that it collects?	Score +1	1
35. Does the organization measure and evaluate customer satisfaction?	Score +1	1
36. Is the organization able to carefully steward resources and successfully meet predetermined deadlines?	Score +1	1
Results	APCS Estimated Results	28
The scores range from -10 to +35.		
The purpose of the tool is to raise awareness concerning the readiness for change and is not meant to be used as a research tool.		
If the organization scores below 10, it is not likely ready for change and change will be very difficult.		
The higher the score, the more ready the organization is for change. Use the scores to focus your attention on areas that need strengthening in order to improve readiness.		
Change is never "simple" but when organizational factors supportive of change are in place, the task of the change agent is manageable.		

Appendix B: Change Process Communication Summary by Stakeholder

Table B1

Change Process Communication Summary by Stakeholder

Stakeholder	Communication method	Frequency	Messaging
Students	Admin town halls	Each semester	Introduction, updates, and milestones
	Education management tool	As needed	Course notification
	Announcements	Daily (as needed)	Events, updates, and milestones
	Leadership teacher communication	Ongoing	Global competency outcomes and assessments
	Career counselor	Monthly	Global career direction
	Central office newsletter	Monthly	External direction, international programing, events, and updates
	School newsletter	Monthly	School events, international programming, events, and updates
Parents	Parent orientation	Annually	Introduction, practical and altruistic value
	School council meetings	Monthly	Events, updates, and milestones
	Parent teacher conferences	Quarterly	Update, Q & A with teachers and administration
	Central office newsletter	Monthly	External direction, international programing, events, and updates
	School newsletter	Monthly	School events, international programming, events, and updates
	Town halls, stakeholder consultation	Quarterly	Stakeholder focus groups; Q & A with board, administration, and leadership
	Campus communication (email, educational management tool)	As needed	Events, updates, and milestones
Staff general	Staff meeting	Weekly	Introduction, practical and altruistic value, teacher Q & A
	Dept. Coordinators meetings	Bi-weekly	Program updates, opportunities, coordinators Q & A
	Team meetings	Monthly	Events, updates, and milestones
	Formal individual meetings	As needed	Updates, Q & A
	Informal meetings	Opportunistically	Updates, Q & A
Global competency staff	Team meetings	Monthly	Introductions, practical and altruistic value, global competency discussions, response to the GCAA, opportunities, events, updates, milestones, Q & A
	Formal individual meetings	As needed	Updates, Q & A
	Informal meetings	Opportunistically	Updates, Q & A