

## Principal Leadership and Prioritizing Equity in An Era of Work Intensification: Must Wellbeing be Sacrificed?

Donna Hazel Swapp  
Western Univeristy

### Abstract

This case explores themes of equity, leadership, wellbeing, and work intensification. The case follows Jennifer “Jen” Barns, the new principal at Westfield Public School, a JK-8 school in Ontario. Jen is overwhelmed by all the responsibilities of the job. She does not have a productive working relationship with her staff and is unable to get them to support a social justice initiative or take on responsibilities at the school. At first glance, it appears the issue may be with the teachers, or the equity agenda Jen is proposing to implement. However, a closer look at the case reveals gaps in principal leadership that would need to be addressed if Jen is to turn things around. Three teaching activities are included to fully situate the case and chart a course of action that includes identifying the issues in the case and developing several leadership principles that would: transform the learning environment at Westfield, foster sustainable school improvement, and improve Jen’s wellbeing. While the case casts an important gaze on the impact of an equity focus on workload and wellbeing, it also provides the basis for a discussion of the pivotal role principals play in leading schools in this contemporary era of change.

*Keywords: equity, leadership, wellbeing, work intensification*

### Case Narrative

Westfield Public School is a JK-8 school situated in what is considered an urban neighbourhood in Southwestern Ontario. There are 36 staff members and 400 students at Westfield. The student population is significantly diverse along ethnic, religious, racial, and cultural lines, and many students come from low socioeconomic households. As many as 160 students are English Language Learners (ELLs) and/or new immigrants. Many of the ELL students are first-generation Canadians; they were born in Canada, but their parents were not, and so English is the second, or even third, language spoken at home. Some of the new immigrant students come from English-speaking countries but bring varying vernaculars, pronunciations, accents, and cultures of English usage to the classroom. The school has a longstanding ELL program, but the new principal believes it could be revamped with an explicit equity focus to better support student learning. However, she has been struggling to get staff to engage with this focus.

Jennifer “Jen” Barns has been principal at Westfield for one year and seven months, and this is her first principalship position. She taught elementary school for eight years at another school board and was the vice principal at Thompson Valley Elementary School for five years. Over her career, Jen completed specialist courses in special education, reading, and computer science. She is now enrolled in the Master of Educational Leadership program at the local university. Jen is convinced that her equity-focused initiatives will make her job more demanding at Westfield. There was not this kind of resistance to equity work during her tenure at Thompson Valley, and, based on her interactions with colleagues who lead schools across the district, her opinion is that those who do not prioritize equity initiatives appear less overworked and do not face the kinds of resistance she does at Westfield.

To say that Jen is overwhelmed by the challenges of her work is putting it mildly. She is embarrassed to admit it out loud, but the spark of excitement she had when she started at Westfield has faded. The high

levels of drug- and gang-related violence in the community often trickle into the school. Teachers seem to refer every issue to the office, no matter how trivial. Jen also has a few child abuse cases troubling her sleep, and many of her students have special needs. There is a multitude of formal learning programs in place for students identified as at-risk, and Jen insisted on a few other informal programs to support ELL students. These programs require volumes of reporting and continuous meetings with various stakeholders, including the school counsellor, parents, students, and sometimes the superintendent. Additionally, on any given day, there are deadlines, budget and operating matters, student safety issues, and emergencies requiring Jen's immediate attention. These daily occurrences, and other administrative and community-focused responsibilities put enormous strain on her, and Jen's failing attempts to build relationships with staff exacerbated this reality. Jen believes the problem is rooted in her focus on equity work in the school because it would require staff to make substantial changes to both their teaching practices and in the way they think about students and student learning. In fact, some members of the staff have been very vocal about their satisfaction with the school's current equity program and their disinterest in changing any aspect of it.

As a graduate student majoring in equity and social justice education, Jen has an elevated understanding of how teaching and learning practices impede success for marginalized groups. She recognized early in her tenure at Westfield that some teachers' thinking about students, and their concomitant classroom practices, were unintentionally discriminatory and even harmful. She spoke to teachers about making the curricula more diverse and inclusive to more fully represent the culture and home environment of the wider cross-section of students in the school, collaborating more with parents, and engaging students in discussions of inclusion and what that looks like in the classroom. She also facilitated two workshops exploring themes of equity in the classroom and at school, and even compiled short video clips with suggestions and actions teachers could take to make their classroom more inclusive. Jen has not seen improvement. The teachers seemed determined to continue as they have always done, and Jen is equally determined to change things.

The lack of collaboration and shared vision among her staff was taking a toll. Jen feels she is taking on responsibilities at Westfield that in her previous school were easily and enthusiastically shared among staff. Additionally, Jen is experiencing increased work intensification as a result of taking on this added work, and remains perplexed at the staff's resistance to her leadership. Thompson Valley and Westfield are in the same neighbourhood, share the same school board and similar demographics, but are so different. As Vice Principal at Thompson Valley, Jen had many responsibilities, including student discipline, and she had developed very positive working relationships with teachers in turning negative student behaviour around.

This morning, Jen is making her way up the stairs to an instructional leadership team meeting in the library on the second floor. Jen created this team in her first few months at Westfield. The team meets the first Tuesday every month to discuss the school's most at-risk cases. The students who make this list are failing academically and demonstrate social and other behavioural issues. Though it is an uncharacteristically bright and warm morning in late March, Jen barely notices as she hurries to this meeting. She is late, annoyed, tired, and questioning her decision to take up the position of principal at this school. She reflects on her work schedule over the past five months and is depressed by how stressful things have been. Just today, she had been up until 3:00 a.m. getting documents ready for her principal performance review, catching up on emails, familiarizing herself with the new student safety policy being implemented by the board, and completing an assignment for her master's program; all after, she had spent two hours after school yesterday attending to paperwork and emails. Her custom is to prioritize emergencies, student safety, and the "people" aspects of her job during the workday and fulfill the "paper" obligations into the evenings and nights. It is uncommon for Jen to leave the school before 5:00 p.m. on weekdays. She also does some work for about two hours at home after she puts her two small children to bed. Typically, she goes to bed around 11:00 p.m. and then gets up at 5:00 a.m. to read emails that were either outstanding or came in during the night or late evening. Though rare, she has also been at school some weekends catching up on work that did not get done during the week. As she hurriedly left the house that morning, she ignored her husband's complaints about her being too busy for her family.

Jen hurries up the remaining flight of steps, but her mind is on the volume of work awaiting her in the office. She is behind on some financial reports requested by her superintendent and has six progressive discipline reports to review. The agenda for the staff meeting tomorrow is not ready, and the analysis of the

new data from the Education Quality and Accountability Office (EQAO), regarding grade three and grade six tests, is outstanding. This analysis informs the self-assessment review of the school improvement plan (SIP) due at the end of the month, as well as the staff Professional Development day in May, and the final SIP due thereafter. But before she could get to these, or any other outstanding or new tasks, she has to investigate the broken watermain (that her night custodian had emailed her about this morning), inspect the girls' bathroom to ensure the electrical work had been completed, and meet with a parent who, as she had glimpsed on her way up to the meeting, is already waiting in the office. She anticipates another late-night working at the office and dreads the fight that will ensue when she informs her husband over the phone.

Jen reaches the top of the stairs, enters the classroom where the meeting is taking place and sits near the door. She feels light-headed and cannot remember if she took her hypertension medication that morning. She reminds herself to renew her gym membership. Jen consciously tries to stop her musings so she could focus on what is taking place in the room, for the meeting had already started. Mr. Stevens is addressing the group. He is one of the ELL support teachers and the school's half-time librarian and has been advocating for improved school-community relations by encouraging staff to forge better relationships with families. He wraps up: "Let's forget test scores and school rankings for a minute. We are about student learning. We must reach all our children—not just some. To successfully do that, we must learn more about our students and the communities from which they come. We must think of innovative ways to reach students so that they can succeed. We might need to do some research, take some classes in Creole, Patois, Swahili, or Farsi, but we must work differently! I think if we follow through with these steps, we'd really see improvement in the long term." This statement is followed by silence.

Jen looks around the room. The six other members of the team are present: the VP, the school counsellor, one educational assistant, an English as a Second Language (ESL) support teacher, a grade five teacher, and a special education support teacher. The aim of this team is simple: identify the top five vulnerable and struggling students in each grade and on a case by case basis, plan interventions, tailor instructions, provide resources, and monitor progress at every subsequent meeting. Jen is proud of this initiative, albeit increasingly less proud of its lackluster member constitution; they did not seem to agree on anything. Not surprisingly, the grade five teacher, Mr. Reuben, breaks the silence: "Peter, I appreciate the points you raised. However, others judge us, and we judge ourselves by said test scores. Yes, we need the student numbers to support our requests for funding, and we are getting these numbers, albeit through the increase in immigrant families in our communities. But this population poses significant challenges for us at Westfield, and we cannot prioritize them over our other families. I agree we need to do something, but we must be fair. We can't be seen privileging one group over another."

Jen cringes at Mr. Reuben's use of the term "albeit" and groans inwardly. She is not surprised with his take on things. Though he is well-meaning, Mr. Reuben does not understand how his emphasis on "fairness" and "equality" alienates marginalized groups of students, which Westfield has in droves. As the longest-serving member on staff, Reuben is well liked and respected, and Jen feels that giving him a seat at "the leadership table" would endear her to staff and help promote the equity agenda. However, Reuben has put on the strongest resistance to her leadership at Westfield (especially on her social justice focus) and Jen carefully considers what is at stake before responding. She wants to improve student learning for all students and truly believes that an equity-focused approach was the right course of action, but she has been failing in getting her staff to support this vision.

She ponders her work intensification, physical fatigue, mental health and wellbeing, but is still unsure how to proceed. Where has she been going wrong? Why has she been largely unsuccessful in building relationships with teachers? Is it the equity vision or her leadership that has somehow "rubbed" staff the wrong way? And, if so, how might she alter either or both to get the needed buy-in from teachers?

## Teaching Notes

This case features several issues relating to principal leadership in the face of growing work intensification (Darmody & Smyth, 2016; Wang, Pollock & Hauseman, 2018). High volumes of paperwork, work-life imbalances, unproductive principal-staff relationships, unsatisfactory levels of parental involvement in student learning, and the demands of securing accountability bear an immense pressure on Jen Barns, a new principal at a JK-8 school in a high needs area in Ontario. The case draws a direct connection between Jen's work challenges and intensification and her physical and mental health and wellbeing, a phenomenon garnering increasing attention in educational research (Phillips & Sen, 2011; Ryland & Greenfield,

2011). Jen considers her challenges to be particularly acute because of her commitment to social justice. She struggles with the implementation of an equity vision at the school, because teachers are not on board. Fostering equity in schools is an important, but difficult to achieve, educational outcome, and principals face resistance when attempting to create more equitable and inclusive school environments for learners (Causton & Theoharis, 2014; Ryan, 2010; Theoharis, 2007). The latest revisions to the Ontario Leadership Framework (OLF) demonstrate the province's commitment to educational equity, inclusion and wellbeing (Pollock, Walker, Swapp & Ben Jaafar, 2019) and a growing body of social justice education research offers frameworks to school principals (Causton & Theoharis, 2014; Ryan, 2010; Scanlan & Theoharis, 2016; Shields, Dollarhide & Young, 2018). At the same time, an argument can be made that the issue at Westfield is not the principal's equity focus, but her mounting leadership responsibilities. While this case casts an important gaze on ELL issues and the impact of an equity focus on workload, it provides the basis for a discussion of the pivotal role of leadership in leading schools in this contemporary era of change. If principals are to prioritize student learning despite the changes and challenges to the substance and scope of their work, they would need to demonstrate leadership that leads to sustainable school improvement (Fullan, 2010, 2014; Lambert, 2007; Shields, 2011). Furthermore, as a *new* principal, Jen is faced with a unique set of challenges. It is vital that Jen "makes sense" of this new work environment and her position as principal, and examine how the understandings she holds about her work constrain and/or enable particular kinds of relationships and working environments (Spillane, 2014; Spillane, Harris, Jones & Mertz, 2015).

The specificity of the case provides a rich description of Jennifer's work context, and the teaching activities that follow here can elicit general discussion and allow for the development of courses of actions that can apply in different school contexts. In considering how Jen should proceed, it is important to take stock of her situation and how she got there. What is the source of Jen's stress? It is possible that Jen is feeling overwhelmed because she is a new principal, and not because of any perceived or added responsibilities brought on by an equity focus. Furthermore, what Jen describes as staff resistance might be teachers' lack of clarity on the equity agenda or a general disagreement about whether this is an appropriate focus for the school. Perhaps there are more pressing issues for the teachers; as principal, Jen needs to know what these are before she can proceed. Change in schools is often difficult and slow, and made complex by the diverse mix of perspectives, approaches, and agendas that can exist among staff (Deal & Peterson, 2016; Muhammad, 2018; Owens & Valesky, 2011). Jen must balance these issues so that everyone's wellbeing is assured and all members actively contribute to the institution's success (Richards, Hemphill & Templin, 2018; Shields, 2011). The following three teaching exercises are intended for use in professional preparation programs for aspiring school principals and professional development courses for incumbent administrators and other school leaders. These exercises utilize a scaffolding approach. The first exercise guides participants in identifying and discussing the central issues of the case. In the second exercise, participants examine leadership for sustainable school improvement, and, in the third, work intensification and stress are the central focus. Each exercise is supported by several articles, and the expectation is that participants would read these beforehand.

### **Activity 1: Identifying and Discussing the Issues**

This activity requires some *a priori* preparation. Participants must be familiar with the case narrative before the workshop/teaching session. Likewise, the participants must also have read the three required readings for Activity 1 identified below. Participants will then be placed in small groups to identify and justify what they consider to be the central issues in this case that would need to be resolved. Instructors/facilitators will reconvene the session as one main group at the end of the activity, and each group will share what they identified as the central issues of the case. The associated articles explore social justice and principals' capacity to create more inclusive schools and examine how new principals make sense of their work and foster distributed leadership. The guiding questions are not exhaustive; instructors/facilitators can modify, delete, or add others to advance the discussion.

#### ***Learning Objectives of Activity 1***

1. Identify and discuss the issues of this case.
2. Create and apply an action plan for Jen's case in achieving a healthy work balance.

**Guiding Questions:**

1. Who are the key players/players wielding most influence at Westfield? How do they exercise/demonstrate this influence, and what is their agenda?
2. Discuss the extent to which you see a problem with (i) the equity focus, and (ii) Jen's leadership at Westfield.
3. Are there other issues that constrain Jen's efforts to build relationships? What do you think these are?
4. What steps can Jen take in "making sense" of her new role as principal before she can prioritize a course of action going forward?
5. As a cumulative activity, have each group share their responses to the larger group. Each group shares what they would do in Jen's case. Groups can also include and/or discuss any additional resources that can inform the discussion on achieving work balance. In this way, groups actively come up with an action plan that can be implemented not just Jen's case, but in and for other areas and people in leadership.

**Supporting Readings for Activity 1**

- Causton, J., & Theoharis, G. (2014). Chapter 1: The Principal's Role in Inclusive Schools. In J. Causton & G. Theoharis (Eds.), *The principal's handbook for leading inclusive schools* (pp. 1-10). Baltimore, MD: Paul H. Brookes Publishing.
- Ryan, J. (2010). Promoting social justice in schools: Principals' political strategies. *International Journal of Leadership in Education*, 13(4), 357–376.
- Spillane, J. P., & Anderson, L. (2014). The architecture of anticipation and novices' emerging understandings of the principal position: Occupational sense making at the intersection of individual, organization, and institution. *Teachers College Record*, 116, 1-42.

## **Activity 2: Examining and Applying Leadership for Sustainable School Improvement**

In this second activity, participants will examine principal leadership with respect to transforming school culture and fostering sustainable school improvement. Participants complete this activity in small groups. While no one course of action may be right or wrong in this case, there are important implications for lack of equity focus and inadequate leadership in schools. Promoting learning for *all* students is the cornerstone of school leadership. Participants should be able to envision, articulate, and apply a course of action that simultaneously attends to the learning experiences and outcomes of students at Westfield while ensuring that responsibilities are shared among staff. The three articles included in this activity offer support in achieving the objectives outlined below, and participants are encouraged to read them prior to this activity.

**Learning Objectives of Activity 2**

1. Explore the ways in which Jen's understandings about her work enable or constrain distributed leadership.
2. Examine the kinds of leadership actions and abilities that transform school culture and foster sustainable school improvement.
3. Consider and articulate a course of leadership action that can positively impact school culture, foster equity, and promote shared accountability for student success.

**Guiding Questions**

1. What are some of the tensions that Jen would have to navigate as she makes sense of her work as a new principal?
2. Which of these tensions are personal, and which are inherent to the principalship? Discuss their nature, place, and impact with respect to Jen's case.
3. Apply principles of transformative leadership, distributed leadership, and/or other forms of shared leadership to Jen's case to promote consensus building and further advance equity, inclusion, and social justice at Westfield. As a cumulative activity, have participants consider and

articulate with the group what course of leadership action can positively impact school culture and foster equity.

### **Supporting Readings for Activity 2**

- Lambert, L. G. (2007). Lasting leadership: Toward sustainable school improvement. *Journal of Educational Change*, 8(4), 311-322.
- Muhammad, A. (2018). Chapter 3: The Believers. In, A. Muhammad (Ed.), *Transforming school culture: How to overcome staff division*. (2<sup>nd</sup> Ed.) (pp. 43-26). Bloomington, IN: Solution Tree.
- Spillane, J. P., Harris, A., Jones, M., & Mertz, K. (2015). Opportunities and challenges for taking a distributed perspective: Novice school principals' emerging sense of their new position. *British Educational Research Journal*, 41(6), 1068–1085.

### **Activity 3: Work Intensification and Wellbeing**

Notwithstanding Jen's positioning as a *new* principal in this case, the work of a school principal is a challenging and daunting prospect. Whatever the source of stress in their work, it is important that principals access resources for addressing their wellbeing to prevent and/or address fatigue, burnout, or other health issues. In this activity, participants will explore conditions that drive principals' work (and create stress), and brainstorm strategies for managing work intensification.

### **Learning Objectives for Activity 3**

1. Identify the conditions including work practices, school climate, and personal leader characteristics that pose a challenge to principals' wellbeing.
2. Critically examine the implications of work intensification and stress on school administrators and articulate an action plan that principals can implement in attending to their wellbeing.

### **Guiding Questions**

1. Identify and discuss some conditions, including personal characteristics and approaches to work, that exacerbate Jen's wellbeing.
2. Outline some strategies that can be applied, in this particular case, to address Jen's wellbeing.
3. How and why should wellbeing (physical, mental) be prioritized in school leadership?
4. As a cumulative activity, have participants work in small groups to develop and disseminate a short presentation—for example audio, video, or PowerPoint—relating to work intensification and wellbeing that has relevance for Jen's case and/or helps new principals navigate the reality of their work in these changing times.

### **Supporting Readings for Activity 3**

- Darmody, M., & Smyth, E. (2016). Primary school principals' job satisfaction and occupational stress. *International Journal of Educational Management*, 30(1), pp.115-128.  
DOI: <https://doi.org/10.1108/IJEM-12-2014-0162>
- Mahfouz, J. (2018). Mindfulness training for school administrators: Effects on well-being and leadership. *Journal of Educational Administration*, 37(2), 165-177. <https://doi.org/10.1108/JEA-12-2017-0171>
- Pollock, K. Wang, F., Hauseman, C. (2017). Complexity and Volume: An Inquiry into Factors That Drive Principals' Work. In Leithwood, Sun, J., Pollock, K (Eds.), *How School Leaders Contribute to Student Success: The Four Paths Framework*. Dordrecht, NL: Springer.

## References

- Causton, J., & Theoharis, G. (2014). Chapter 1: The Principal's Role in Inclusive Schools. In J. Causton & G. Theoharis (Eds.), *The principal's handbook for leading inclusive schools* (pp. 1-10). Baltimore, MD: Paul H. Brookes Publishing.
- Darmody, M., & Smyth, E. (2016). Primary school principals ' job satisfaction and occupational stress. *International Journal of Educational Management*, 30(1), pp.115-128. <https://doi.org/10.1108/IJEM-12-2014-0162>
- Deal, T. E., & Peterson, K. D. (2016). *Shaping school culture* (3<sup>rd</sup> Ed.). San Francisco, CA: Jossey-Bass.
- Fullan, M. (2010). *Motion leadership: The skinny on becoming change savvy*. Thousand Oaks, CA: Corwin.
- Fullan, M. (2014). *The principal: Three keys to maximizing impact*. San Francisco, CA: Jossey-Bass.
- Lambert, L. G. (2007). Lasting leadership: Toward sustainable school improvement. *Journal of Educational Change*, 8(4), 311-322.
- Mahfouz, J. (2018). Mindfulness training for school administrators: Effects on well-being and leadership. *Journal of Educational Administration*, 37(2), 165-177. <https://doi.org/10.1108/JEA-12-2017-0171>
- Muhammad, A. (2018). *Transforming school culture: How to overcome staff division*. (2<sup>nd</sup> Ed.). Bloomington, IN: Solution Tree.
- Owens, R. G., & Valesky, T. C. (2011). *Organizational behavior in education: Leadership and school reform* (10<sup>th</sup> Ed.). Boston, MA: Pearson.
- Phillips, S., & Sen, D. (2011). Stress in head teachers. In J. Langan-Fox, & C. L. Cooper (Eds.), *Handbook of stress in the occupations* (pp. 177-201). Cheltenham, MA: Edward Elgar.
- Pollock, K., Walker, A., Swapp, D. H., & Ben Jaafar, S. (2019). Personal resources for leading. In, J. Weinstein and G. Muñoz (Eds.), *Cultivating leadership in education/Cómo cultivar liderazgo educativo. Trece miradas* (pp. 140-171). Santiago, Chile: Educational Leadership Development Center/ Ediciones Universidad Diego Portales (UDP).
- Pollock, K., Wang, F., & Hauseman, C. (2017). Complexity and volume: An inquiry into factors that drive principals' work. In K. Leithwood., J. Sun, & K. Polloc (Eds.), *How School Leaders Contribute to Student Success: The Four Paths Framework* (pp. 209-238). Dordrecht, NL: Springer.
- Richards, K. A. R., Hemphill, M. A., & Templin, T. J. (2018). Personal and contextual factors related to teachers' experience with stress and burnout. *Teachers and Teaching*, 24(7), 768-787.
- Ryan, J. (2010). Promoting social justice in schools: Principals' political strategies. *International Journal of Leadership in Education*, 13(4), 357-376.
- Ryland, E., & Greenfield, S. (2011). An investigation of gender differences in occupational stress and general well being. *Journal of Applied Business Research*, 6(4), 35-43.
- Scanlan, M., & Theoharis, G. (2016). Introduction to special issue – intersectionality: Promoting social justice while navigating multiple dimensions of diversity. *Journal of Cases in Educational Leadership*, 19(1), 3-5.
- Shields, C. (2011). *Transformative leadership*. New York, NY: Peter Lang.
- Shields, C., Dollarhide, C. T., & Young, A. A. (2018). Transformative leadership in school counseling: An emerging paradigm for equity and excellence. *Professional School Counseling*, 21(1b), 1-11.
- Spillane, J. P. (2014). The architecture of anticipation and novices' emerging understandings of the principal position: Occupational sense making at the intersection of individual, organization, and institution. *Teachers College Record*, 116, 070306, 1-42.
- Spillane, J. P., & Anderson, L. (2014). The architecture of anticipation and novices' emerging understandings of the principal position: Occupational sense making at the intersection of individual, organization, and institution. *Teachers College Record*, 116, 1-42.

- Spillane, J. P., Harris, A., Jones, M., & Mertz, K. (2015). Opportunities and challenges for taking a distributed perspective: Novice school principals' emerging sense of their new position. *British Educational Research Journal*, 41(6), 1068–1085.
- Theoharis, G. (2007). Social justice educational leaders and resistance: Toward a theory of social justice leadership. *Educational Administration Quarterly*, 43(2), 221–258.
- Wang, F., Pollock, K., & Hauseman, C. (2018). School Principals' Job Satisfaction: The Effects of Work Intensification. *Canadian Journal of Educational Administration and Policy*, 185, 73-90.