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## Equity, Diversity, and Inclusion in Alberta Accredited International Schools: Bridging Modern and Traditional Societal Perspectives in Educational Practice

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## Abstract

International schools accredited by Western-based educational paradigms encounter specific challenges within the theoretical framework of equity, diversity, and inclusion (EDI), as perceived through the lens of social justice in education. This Organizational Improvement Plan (OIP) considers, from the context of modern and traditional societies, the change readiness of the Alberta Accredited International Schools program (AAIS) surrounding the practice of EDI. Generalized expectations of universal application present with factors that may provide educational leaders with the framework to deliberate critical theory motivating practice. Modernist and traditionalist societal views of EDI, and the translation of pedagogical frameworks through educational reform, are considered. My agency as an external educational psychologist and EDI consultant provides a practical, site-based context of change with a worldview of transformative leadership. As an external consultant, I proposed a blended change model, including Cawsey et al.'s (2016) Change Path Model through the lens of Capper's (2019) critical theory for organizational improvement. The proposal of an EDI policy analyst change driver to inform a transformative worldview and associated theoretical resolutions is presented. Solutions are offered to influence current and future alignment within varied contexts between the provincial agency and the AAIS program sites. Informed by social justice in educational leadership, this OIP accepts a theoretically based challenge to apply a transformative leadership model of EDI practice to AAIS leaders. The outcome includes an alternative conceptualization of EDI practice demands within schools existing in a traditional society aligned with a Western-based educational pedagogy.

*Keywords:* transformative leadership, equity, diversity, inclusion, social justice, traditional society, modern society, critical theory

## Executive Summary

This Organizational Improvement Plan (OIP) theorizes the integration of Western-aligned educational pedagogy of equity, diversity, and inclusion (EDI) practices within international schools that have been accepted as Alberta Accredited International Schools (AAIS). The problem of practice (PoP) centres on a gap within the 17 AAIS locations worldwide to bridge EDI practices at traditionalist-based AAIS to meet modernist-based mandated provincial guidelines. Guided by the work of Freire (1970/2018) and Shields (2018), this OIP addresses the interpretation and application of EDI as a united process in education. Linking the readiness of the organizations involved in the accreditation agreement through the work of Cawsey et al. (2016) is instrumental to the change process. This OIP challenges the perspective of hegemony from an integrated perspective of Lewin's (1947a, 1947b) three-stage change model. It challenges the schism between traditional societal valuation of individuals and the directed mandates of modernist societal influence regarding EDI.

Chapter 1 of this OIP provides context and consideration for a theoretically based framework of EDI in education. Defining terms and interpretations associated with the PoP, including social justice in education and a reconceptualization of EDI leadership, creates a foundational framework for guiding change. Identifying stakeholder positions and informed by Lewin's (1947a, 1947b) original social theory and the reorientation as outlined by Cawsey and Deszca (2007), this chapter highlights the importance of recognizing social justice leadership as a powerful force for equity. With the understanding of multiple EDI worldviews, Chapter 1 also highlights the force field analysis (Cawsey et al., 2016) as a tool for conceptualizing the AAIS organizations' readiness for change. Fostered by Capper's (2019) conception of substantive

inclusion, this chapter summarizes the theoretical influence of transformative leadership resulting in sustainable change.

Chapter 2 provides a critical analysis influenced by critical theory (Capper, 2019). It sheds light on a worldview of historical limitations placed on members of traditional as well as modern societies. Freire's (1970/2018) indications of a universe of themes align with Alberta Education's (2020) *Teaching Quality Standard*. These standards are mandated by the provincial system for schools seeking AAIS program acceptance. From within this paradigm, the focus on contingent leadership (Bush, 2020) and the associating issue-contingent model emerges (Jones, 1991; Simga-Mugan et al., 2005). This chapter looks to clarify episodic and continuous change in relation to the change path model (Cawsey et al., 2016).

Three possible solutions are presented in Chapter 2 to address the theoretical underpinnings of the sheer magnitude of social justice in education and examine how the process can influence all leaders in international education. Supported by Keast (2015), solutions are designed to link the conceptualization of EDI policy as praxis guided by specialist staff. Integration of the research of Oplatka and Arar (2015) highlights the five elements of leadership aligned with an alternate meaning of social justice. Chapter 2 also includes a description of the ethical ramifications—and dangers—of accepting a “West is Best” approach and transformative ideals that may inform a collaborative approach based on universal values. The proposition of change and the understanding of the complexities within educational systems involving ethics are considered using Starratt's (2012) multiple ethical paradigm. The concept of social justice in education as a change driver for emerging transformative leaders is highlighted as an ethical responsibility.

Chapter 3 sheds light on the fragility of change in AAIS and looks to strengthen the change process by proposing the implementation, evaluation, and communication plans, measured by a monitoring and evaluation framework (Markiewicz & Patrick, 2016). A systemic approach to change implementation is presented. To evaluate the change process, the DICE (duration, integrity, commitment, effort) model is introduced to provide information to support clear directives and reasonable financial considerations. Chapter 3 concludes with a discussion of staffing and policy to further continue to work on transformative leadership and the vision of social justice and EDI in equitable education systems worldwide.

This OIP applauds the very state of education as an empowering institution for change. It addresses the challenges within the current system when alignment in a subjective term of social justice is demanded between traditional and modern societies. The system may seek to determine a universal set of policies and systems integrations that allow for equitable practice to be not only passively accepted, but also carefully implemented to ensure best practice among societies. This change process supports a synthesis within the epistemology and a disruption of the highlighted praxis in inclusive education (Freire, 1970/2018). Through the lens of Freire (1970/2018), with support of key contributors including McGovern and Sigman (2005), Marshall and Olivia (2021), Shields (2010, 2011, 2012, 2018), and Dantley and Tillman (2010), this OIP strives to address EDI while holding traditional and modern societies constant. The movement of social justice and EDI will be acknowledged by challenging culture to confront with culture. An implementation plan contingent with theory and praxis can evolve. This OIP seeks to provide solutions to disrupt, to reform, to rise up within the context of social justice and EDI practices in education.

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## Acronyms

AAIS	(Alberta Accredited International Schools)
DICE	(Duration, Integrity, Commitment, Effort)
EDI	(Equity, Diversity, Inclusion)
IE	(International Education)
OIP	(Organizational Improvement Plan)
PDSA	(Plan-Do-Study-Act)
PESTE	(Political, Economic, Social, Technological, Environmental [Analysis])
PLC	(Professional Learning Community)
PoP	(Problem of Practice)
<i>TQS</i>	<i>(Teaching Quality Standard)</i>
UNESCO	(United Nations Educational, Scientific and Cultural Organization)

## Definitions

*Alberta Accredited International Schools program:* Alignment between Alberta Education and international partners to enable international schools to offer the Alberta curriculum to students (Government of Alberta, n.d.-a). The program works to increase international recognition of Alberta's high-quality education through its international schools and enable international schools to provide the Alberta curriculum and credentials to their local students (Alberta Education, 2021).

*Contingent leadership:* Based on a theory of contingency, this leadership style is dependent on whether a particular leadership style suits the situation.

*Equity:* Encompassing a wide variety of educational models, programs, and strategies that may be considered fair, but not necessarily equal, to ensure every student has the support they need to be successful.

*Equity, Diversity, and Inclusion:* Policies and programs that outline the efforts an institution takes to create a more welcoming environment for people of less-privileged identities.

*Glocalization:* A meaningful integration of local and global forces (Brooks & Normore, 2010).

*Inclusive education:* A way of thinking and acting that demonstrates universal acceptance of, and belonging for, all students (BRSD, 2021).

*Modernist society:* A Western-based approach in developed and developing countries and seen as the change from a preindustrial state or condition.

*School community:* The various individuals, groups, businesses, and institutions that are invested in the welfare and vitality of a public school and its community, including the neighbourhoods and municipalities served by the school.

*Social justice:* A moral framework concerned primarily with documenting and fighting oppression.

*Teaching Quality Standard:* A framework for the preparation, professional growth, supervision, and evaluation of all teachers (Alberta Education, 2020).

*Tier system:* A four-level designation identified by Alberta Education to align international schools with specific guidelines associated with accreditation.

*Traditional society:* A societal determination of the preservation of traditional values and norms typically rooted in traditional societies or developing countries.

*Transformative leadership:* A leadership theory based on an inherently normative and critical approach grounded in the values of equity, inclusion, excellence, and social justice (Shields, 2018).



## Chapter 1: Introduction and Problem

Education is not the ultimate lever for social transformation but without it, transformation cannot occur. (Freire et al., 2018, p. 37)

The exploration of leadership connected to social justice in educational systems has been more prevalent as attention shifts towards equity, diversity, and inclusion (EDI), and to identifying and dismantling systemic forms of oppression. Freire's (2018) powerful provocation extends to this Organizational Improvement Plan (OIP), which seeks to enact transformative change for social justice as EDI. Chapter 1 introduces a theoretical discussion on the challenges and benefits of a practicing Western conceptualization for leadership in education, with a major ideology of EDI as prescribed to both traditional and modern societies seeking accreditation. It confronts the theoretical application of mandated EDI practice in traditional international educational contexts from the design associated with a modern, Western lens.

Both the terms *traditional* and *modern* as related to society encompass religion, moral standards, socioeconomic and political attitudes, and attitudes towards work, family, marriage, and sexuality. For this OIP, the term *traditional* applies to a cultural community where traditional values influence educational change. The term *modern* or *Western* includes a value system that is based on European values and reflects the influence of political and economic changes in education pedagogy (Galland & Lemmel, 2008). The dichotomy of modernism–traditionalism, as defined by Oplatka and Arar (2015), highlights the dangers of uncritically assigning concepts between differing societies. The very integration of Western-based philosophy when applied to the social justice aspect of EDI suggests challenges in the universal application of such concepts in international contexts.

## **Organizational Context**

This OIP explores a problem of practice (PoP) that aspires to influence educational change leaders in Alberta Accredited International Schools (AAIS) to bridge modern and traditional value systems in EDI. Grounded in the leadership model of transformative leadership and reinforced by the change path model of Cawsey et al. (2016), Capper's (2019) critical theory (2019), and Lewin's (1947a, 1947b) three-stage change management model, this chapter includes a theoretically based discussion regarding EDI in AAIS. It addresses the change readiness of the international school climate and recognizes the challenges posed by a Western-based EDI–social justice paradigm as applied to AAIS located in traditional societies. Through the lens of Freire (1970/2018) and Shields (2018), implications of the broad definition of EDI as applied to educational systems are addressed.

### **Introduction and Context**

The context of Alberta Accredited International Schools (Government of Alberta, n.d.-a) presents agency for international schools within the process of accreditation. AAIS as an organization works to (a) increase international recognition of Alberta's high-quality education, (b) enable international schools to provide the Alberta curriculum and credentials to their local students, (c) create opportunities for international schools to receive Alberta Education accreditation, and (d) collaborate with government ministries and nongovernment organizations to link associated individuals with opportunities to study and work in Alberta (Government of Alberta, n.d.-a). Currently, 17 international school systems in 14 different countries are certified as in partnership with Alberta Education, rated as levelled tier schools based on their position with the criteria provided (Alberta Education, 2019).

Alberta Education (2020) has provided a professional practice standard called the *Teaching Quality Standard (TQS)*. It has defined six key competency areas for educators, including establishing inclusive learning environments (Alberta Education, 2020). This competency addresses fostering equity and respect with regards to the Alberta Human Rights Act (2000) and the Canadian Charter of Rights and Freedoms (Constitution Act, 1982). Appropriate universal and targeted strategies to address students' strengths and learning challenges, and facilitating responses for emotional and mental health needs, are considered key priorities.

The *TQS* (Alberta Education, 2020) has identified that “all Alberta teachers are expected to meet the *Teaching Quality Standard*. In any given context, reasoned professional judgement must be used to determine whether the *Teaching Quality Standard* is being met” (p. 3). The guidelines of the *TQS* are mandatory as a framework for the preparation, professionalism, growth, supervision, and evaluation of all teachers.

In 2013, Alberta Education defined a policy initiative as a Ministerial Order on Student Learning including principles to guide and inform value-based and learner-centered decisions. In terms of EDI, equity addresses the state of fair and respectful treatment of all people; diversity includes human qualities within a group, organization, or society that can include race, religion, sex, or language; and inclusion is based on principles of acceptance and respect (Government of Alberta, n.d.-b). The University of British Columbia's (n.d.) Direction on Skills and Competencies furthers the application of EDI in education to encompass “the attributes, knowledge, skills, abilities, attitudes, values, and/or principles that demonstrate an understanding of equity, a commitment to diversity, and an ability to create inclusive environments” (University of British Columbia, n.d., EDI Skills and Competencies section, para. 1).

AAIS programs are mandated to offer a broad spectrum of EDI practices that reflect Western values, and those values may conflict with cultural, religious, and societal perspectives within a traditional system. Given that the PoP exists at the AAIS site level, this OIP is directed at school leaders as change agents across the multiple international AAIS locations (school sites). It seeks to inform school leaders to determine solutions for increasing EDI practice within their agency. Desired outcomes include a positive reputation as change leaders in EDI, strengthened alignment with the EDI competency of the *TQS* (Alberta Education, 2020), and the sought-after advancement to Tier Four accreditation.

Narrowing the focus from the broader level leadership within AAIS sites, the agency of students with exceptionalities could also be determined as a guiding influence as affected parties regarding EDI principles. Areas of consideration in AAIS continue to include the concepts of diversity, inclusiveness, and valuation of the individual. The value of a person—the societal recognition of contribution—is affected by cultural influence. Therein lies the tension surrounding worldview in the EDI debate. Access to EDI-informed practice, trained educators, diversity in staff, and support from stakeholders are key aspects in forming a truly inclusive AAIS experience.

### **Historical Context of AAIS**

Currently, more than 5,800 students in pre-Kindergarten to Grade 12 attend AAIS, and the program employs over 350 Alberta certificated teachers. Examples of countries with AAIS include Qatar and the United Arab Emirates (Government of Alberta, n.d.-b). One school has obtained the highest status, Tier Four, and 13 others have achieved Tier Three status. Benefits to the school include academic programs that may not otherwise be available such as International Baccalaureate, highly trained Western educators, and a global reputation.

The process of accreditation is lengthy and begins with an initial expression of interest; the school then proceeds through a four-tiered process that builds capacity and “assures continuous improvement” (Government of Alberta, n.d.-a, Accreditation Process section, para. 1). Achievement of higher tiered placements represents a process of consistently meeting regulated standards as determined by the Government of Alberta, monitored by onsite and remote evaluation.

### **Political Economy of International Education and AAIS**

From a globalization perspective and blurring geographical boundaries, International Education (IE) organizations have served as an emerging player in transnational capital and social class formation. As an industry, IE has demonstrated significant growth in global networking (Wylie, 2010). Sites approved as AAIS programs by Alberta Education provide an alliance between key political and financial stakeholders.

Transformative structural change benefits from addressing the similarities and differences within the school sites that are presenting with different cultural beliefs and practices. Brooks and Normore (2010) defined *glocalization* as a meaningful integration of local and global forces, and the concept plays a significant part in the discussion on EDI and cultural divides.

### **Cultural Context**

Unique challenges within AAIS exist. Adding to the complexity, IE leaders for social justice are often influential advocates for activism that includes culturally relative and context-specific education (García-Carmona et al., 2021), yet they are constrained by opposing societal belief systems such as ableism. The belief systems surrounding EDI of the owner and board of a given school are key influences in the philosophy and practice within the school system, affecting pedagogy.

A respectful discussion on the transformative leadership presence challenged by different barriers—and the influence of both the traditional perspective of EDI practices and the changes made (and required) by the Canadian provincial system—is important. Such a discussion would balance the integrity of the proposed change suggested in this OIP and stand as a change path mechanism that aligns with my agency.

### **Pedagogical Practices**

AAIS sites differ amongst themselves due to geographical position as well as cultural influence, thus creating more issues for tiered advancement. Depending on location, the schools may be publicly or privately funded. Acceptance may be viewed as an elitist opportunity for children in developing countries to gain equitable access to a Western-based education. Parents may pay a significant yearly tuition fee to the school system after a lengthy enrolment process. Teachers are advertised as highly trained individuals, and AAIS have shown a preference for those educated in Western institutions and intentionally recruited.

The challenge addressed within the context of this OIP is the theoretically based task to apply a model for leadership that allows for an alternative conceptualization. An ethnocentric claim on EDI designed through a Western lens exists that does not align with traditional societies. The layers of challenges within the linked educational systems from a global perspective require theoretical underpinnings, recognition of transformative leadership challenges, and options for solutions that conceptualize leadership for social justice.

According to Appadurai (1990), the current global cultural economy is characterized by a complex network of transnational imaginary landscapes. The social imagery (Appadurai, 1990) would be forced to change several constructs, including global diversity. Discussion of curriculum development includes the idea that the very criteria of traditional programs are not

necessarily feasible for the population of individuals with exceptionalities. However, research addressing education in the global context presents with a new movement fostering revolutionary transformation of equitable educational practices.

This movement, as Oplatka and Arar (2015) have supported, includes critical and evocative dialogue with the intention of transformative leaders within the social justice community engaging in critical self-reflection and growth (Dantley & Tillman, 2010). AAIS may be pioneers in this movement, modelling EDI practices and collaboration with international stakeholders for change. From a context perspective, contrast continues to exist between modern and traditional value systems.

The organizational context of this OIP problematizes EDI practice in traditional education settings with a framework rooted in Western culture whereby AAIS accreditation is at stake. Further, the historical, political, and pedagogical context outlined earlier in this OIP challenges the author to consider what transformative leadership for EDI represents so that defined principles are upheld for all students. Identity is linked to the belief system that the problem is not the child and their impairment or exceptionality, but rather the social and attitudinal barriers within education systems (McGovern & Sigman, 2005). It should be noted that not all schools identifying as AAIS exist in a traditional system, and only those facing challenges between the two dichotomies are addressed within this OIP.

### **Leadership Position and Lens Statement**

A description of my personal position including agency and power provide context to my influence as well as my challenges as an influencing change agent.

## **Personal Position and Professional Expertise**

I am a registered (educational) psychologist and teacher in the province of Alberta. As a registered psychologist, I am held to confidentiality guidelines regarding my clientele; therefore, specific school names and individuals cannot be shared within this OIP. My private psychology practice supports students across multiple geographic areas with specific learning challenges as well as neurodevelopmental disabilities. Services include psychoeducational assessment, diagnoses, and the creation of strategic support plans (individual program plans) designed for Albertan students. I work with multidisciplinary teams that include occupational therapy, speech and language pathology, medical specialties, and physical therapy to provide collaborative, wrap-around service for student programming.

In classrooms, I am a consultant to school staff, providing services for public and private systems not only in Alberta but also those outside of the province. Typically, the inclusion coordinator or the associate superintendent of Student Services contracts specialized educational psychology-related services. Examples include professional development opportunities for staff to build capacity in EDI, direct modelling, and one-on-one work with paraprofessionals and teaching staff in classrooms, as well as assessment of individual students to determine appropriate recommendations aligned with curriculum.

## **Agency and Power**

Schools—including AAIS—invest funds in services that will move EDI frameworks forward, increasing accountability and meeting mandated requirements. Practical application and a continuity of support are important facets of my work. My agency as an external consultant exists to provide collaborative responses with stakeholders building internal capacity. This input



is intended to create conditions whereby stakeholders can shift their beliefs regarding an inclusive system that values all learners and ultimately move towards a more equitable society.

Although I hold power as an expert in the field and have the reputation to support my work, I do not have the agency to lead change in school systems where staff refuse to engage in the EDI process, where there is resistance to the change process from senior management, or where societal values do not align with my transformative worldview.

### **Lens Statement**

Capper (2019) and Foster (1986), aligned with Shields (2018) and Freire (1970/2018), have supported that the epistemology of current systems focus on oppression, power, and inequity. Within the alignment between international school sites and the provincial organization, I seek to present solutions that narrow the divide between oppressive marginalization and EDI. If educational institutions are to implement radical, transformative change, stakeholders must be ready to admit that the historical processes have not been accessible, equitable, or inclusive as a global educational pedagogy.

Capper's (2019) tenets of critical theory support transformative leadership. They are the foundation in this discussion of inclusivity in provincially aligned international school systems and are further explored in Chapter 2. These tenets are (a) concern for suffering and oppression, (b) critical view of education, (c) reuniting facts and values with a goal of social justice, (d) emphasis on power between the oppressor and the oppressed, (e) praxis, and (f) leadership as a political act. Critical theory is rooted in the focus to relieve suffering, highlight those in power positions, and reveal the blatant directive that oppression exists in organizations (Capper, 2019).

Supported by Yeakey et al. (1986), critical theory encourages educational leaders to examine why certain influences prevail, how some individuals have access to resources, and why

some others are underrepresented. Specifically, with regards to critical theory and education, Capper (1993) linked “historical, political, economic, and societal contexts” (p. 13). Guided by these factors, the OIP addresses the multifaceted discussion of EDI, the relationship between modern and traditional societies, and the EDI movement in education promoting societal change.

A pioneer of the theoretical underpinnings directed towards equity and justice, Capper (2019) indicated that critical theory has historically informed educational practice. Although educators may not recognize or identify the universal social oppression (Capper, 2019, p. 70), the recognition itself is hopeful in the movement for change. As a theorist linked to this OIP, Capper (2019) described Freire as the philosopher who spawned critical pedagogy. Working in the scope of granted assumptions in educational leadership, Foster (1986) lent foundation to critical theory by identifying the important development of truth, justice, and freedom as options for change and delineating how the administrative process contributes to this development.

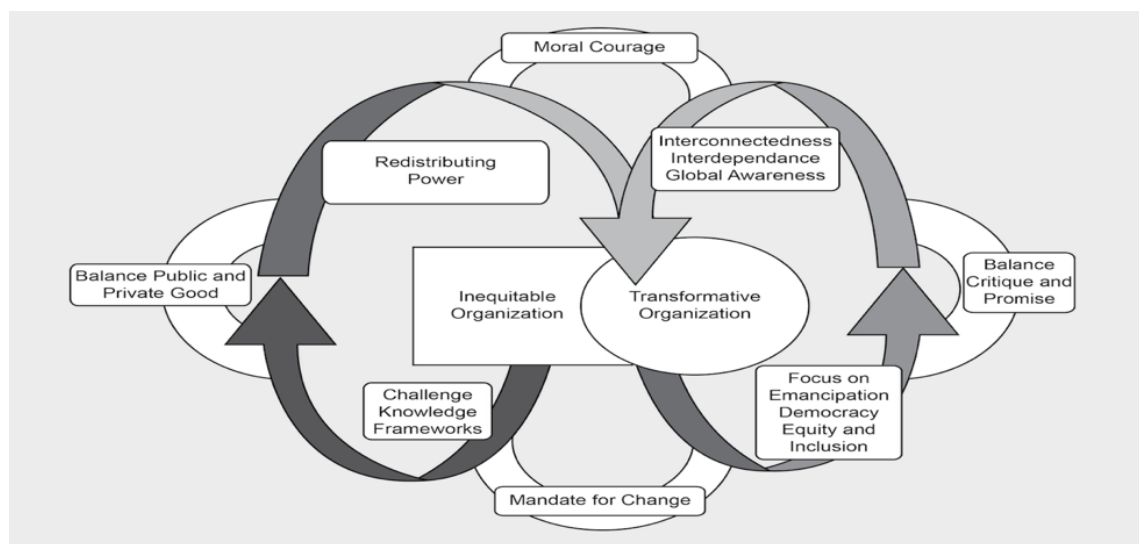
The transformative leadership approach and the concept of real change (Shields, 2018) within the AAIS context aligns with the wide-ranging facets of local, national, and global communities. Shields (2018) describes eight tenets of transformative leadership with a specificity towards EDI as a “focus on emancipation, democracy, equity, and justice” (p. 22). Shields’s (2018) model of transformative leadership theory depicts the interconnectedness of the tenets as well as the dynamic fluidity of the system (see Figure 1).

As a transformative change agent influencing change leaders, I hold more power in my provincial agency. The government in Alberta has designated clear guidelines for instituting EDI practices, such as the *TQS* (Alberta Education, 2020). Challenges exist in international communities where such guidelines are not supported by law. Thus, Shields’s (2018) description of transformative leadership with a focus on equitable and socially just changes informs this OIP

with the directive to combat the oppression of the culture of power. This idea broadens the definition of standards regarding the sense of fit in the recruitment and acceptance of students in AAIS, and in viewing the school community as a public good. Leadership promotes clear moral directives from a pedagogical standpoint in education (Shields, 2018). Transformative leadership aligns strongly with EDI and the perspective of classless unity in education.

### Figure 1

#### *Model of Transformative Leadership Theory*



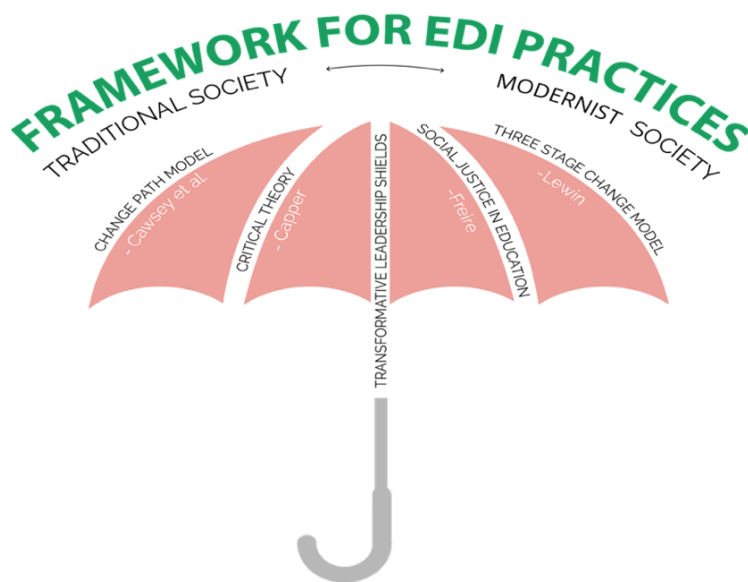
A social justice leader is one who creates conditions for the oppressed to advocate and enact change, whereas a transformative leader stands in front of an issue (Freire, 1998). There exists an intersectionality between the two concepts, assigning the role of the transformative leader as one of advocacy (Shields, 2010). Transformative leadership addresses educational marginalization, reform, and global citizenship that supports the also fluid Lewinian (1947a, 1947b) stage of refreezing as a coexisting stage within leadership theory. Guided by this framework, this OIP strives to address the PoP created by the complexity of the dual-country educational systems and EDI.

## Theoretical Framework for Application

The theoretical framework for application is envisioned as an umbrella of theory, change models, and the collaboration between societies, solidly supported by transformative leadership (see Figure 2). This conceptualization depicts the relationship between historical and current theoretical perspectives. Can elements of leadership for social justice provide compatibility between societies that are traditional or modernist (Oplatka & Arar, 2015)? As a result of this conceptual framework identifying key facets towards change, questions evolve. They are discussed in the section, Guiding Questions Emerging From the Problem of Practice.

### Figure 2

*Framework for Application of EDI*



### Leadership Problem of Practice

This OIP seeks to inform and influence educational stakeholders in 17 AAIS sites to bridge EDI practices at traditionalist-based AAIS to meet modern-based mandated provincial guidelines as outlined in the *TQS* (Alberta Education, 2020) for accreditation compliance. Considerations include the following three points: (a) the need to intentionally implement EDI-

informed practices in societal educational contexts where the perception of individuals with exceptionalities differs between sites, (b) the agency of an external consultant to enact change, and (c) the influence of EDI as a worldview with the absence of mandated national guidelines and laws as encouragement to comply.

Through the lens of transformative structural change, this OIP addresses the similarities—and differences—within the dual organizations on a theoretical level that present different cultural beliefs and practices. It is problematic that AAIS can offer an educational experience that prioritizes exclusionary practice when it is governed by an inclusive Canadian ideal. How then does an external Canadian consultant navigate the divide, build trust, and maintain stakeholder confidence while holding true to their personal values? Further, how can a transformative leadership approach serve as a bridge between two distinct cultures so that social justice for all students is the result?

Embedded in critical theory and led by Freire's (1970/2018) fundamentals of social justice in education, this OIP examines the process and progress of schools aligned with Canadian curriculum and accredited by Alberta Education. Transformative leadership in response to EDI suggests that one needs to investigate not only the strengths of the leadership approach but also areas necessitating further development in the broad societal impact of response to EDI.

It is in this context (an external consultant in an internal system of administrators, teachers, owners, and directors, who are held to external policy) that questions remain: Whose politics are at play? Whose vision of cultural literacy is most appropriate? Whereas Tuana (2003) suggested that there is a broad understanding of the basic, foundational aspects of EDI, including honesty, fairness, respect, responsibility, and caring, the common acceptance of treatment for

individuals with differences has remained inconsistent. A respectful comparison of the transformative leadership presence influencing the aligned schools and the Canadian provincial system is important to the balance and integrity of change. Glocalization, defined as the integration of global and local forces (Brooks & Normore, 2010), is forcing the broad system and a range of influencers to examine their own EDI practices.

### **Framing the Problem of Practice**

In an educational system that encourages stakeholders, including parents, businesses, and community, to assist in defining the practices within international schools, advocacy and justice for all learners come into play. Cognitive shifts include framing problems, possible solutions, and the constituency (Foldy et al., 2008). These shifts are apparent as stakeholders in educational systems have voiced their interest and support for EDI, although the struggle with consistency and sustainability continues.

Education is not serving students who are empty vessels but who instead present with a learner history. This history is complex and vulnerable. “Within the international education and developmental research literature, a concern with the effects of adopting a deficit perspective on specific groups can be traced” (Aikman et al., 2016, p. 314). An aspect of the PoP that needs to be highlighted when positioning AAIS with Western-aligned ideology includes this deficit perspective examining historical and current practices.

### **Historical Overview and External Data**

The history of special education and discussions on EDI in an international setting have been historically recent. In 2000, *The Dakar Framework for Action: Education for All: Meeting Our Collective Commitments* (United Nations Educational, Scientific and Cultural Organization [UNESCO], 2000) was adopted by the World Education Forum. The challenges presented

included equity and access to education. Currently UNESCO monitors the implementation of normative instruments, collaborates with the United Nations on the rights of persons with disabilities, and assists member states to revise policy on the subject (UNESCO, 2019). The 2006 *Convention on the Rights of Persons With Disabilities* specifically called upon parties to “ensure an inclusive education system at all levels and lifelong learning” (United Nations, 2006, Article 24, para. 1).

Concerns regarding EDI, learning differences, and the perspective of international schools exist. An impactful observation has arisen: “There would be a huge outcry if an international school refused to take students on the basis of race, religion or ethnicity. What makes learning diversity different?” (Powell & Kusuma-Powell, 2016, p. 1).

### **Current Guidance and Internal Data**

The *Handbook for Alberta Accredited International Schools* (Alberta Education, 2019) outlined the process of alignment with Alberta curriculum and tiered placement. From onboarding to a four-tiered designation system, this process delineates the associated institution and grants high school diplomas as a Tier Three and Tier Four school (Alberta Education, 2019). Schools must also ensure that outcomes are consistent with provincial policies and standards as established by the education minister (Alberta Education, 2020).

The “why” of change for AAIS lies in the *TQS* (Alberta Education, 2020). The *TQS* is particularly relevant to this discussion as it requires “Establishing Inclusive Learning Environments” (p. 4) and includes the following statement: “A teacher establishes, promotes and sustains inclusive learning environments where diversity is embraced and every student is welcomed, cared for, respected and safe” (p. 4). A struggle across the very different dimensions of education from a global perspective would naturally suggest that not all schools are

implementing EDI practice to the same level. Differences in tiers within AAIS further suggest that sites vary in EDI leadership, performance measures, and outcomes.

Examples of the current internal process to drive change in one AAIS site include a “push-in” philosophy of student support rather than of segregation, full inclusivity in classrooms, increased differentiation and training for staff, equal access to learning opportunities, and creating a shift in culture ([Senior Administration], 2020). Some AAIS leaders are increasing staff capacity to identify students who require individual program plans, behaviour support plans, or individual service plans, and are modifying or adapting curriculum as needed.

### **Analysis of Literature to Support the Problem of Practice**

The very framework of EDI in Alberta Education requires scrutiny of the system that global educational institutions strive to model. Although the current *TQS* (Alberta Education, 2020) is clear on EDI, the model of inclusive planning in Alberta Education was reinvented prior to the incorporation of the term EDI. Alberta’s inclusive frameworks have garnered scholarly disdain. In their journal article aptly titled “Inclusion’s Confusion in Alberta,” Gilham and Williamson (2014) critiqued Alberta Education’s 2005 proposal defining inclusive practices in Alberta schools. The authors discovered that funding dollars were allotted with the recognition that severe disabilities coding had risen 64%. L. J. Graham and Jahnukainen (2011) described the correlation between the rise in severe disabilities and the attachment of dollars directly to the severe disability designation in Western school jurisdictions as “bounty funding” (p. 283).

In 2012, the Action on Inclusion was created as a reformation of the inclusive policy and a transformative model (Gilham & Williamson, 2014). However, Gilham and Williamson (2014) queried what happened to the original plan that was delivered quickly and with little regard to its monetary shortfalls. The authors indicated that their fears included the normalization of



disability-promoting stakeholders to continue to support segregation and an absence of accountability for funding decisions.

Similar discrepancies between the theory and practice of EDI in international schools can be attributed to interpretation of the term *social justice*. A code of ethics has been allowed to be bent, at this level, for the good of the overarching program and the influences from society and stakeholders. In describing ethics and special education programming, Leach (2013) focused on the aspect of international ethics defining standards across borders. The concept of test-related standards and standardization of assessment has also been linked to “a status of ethics codes regionally and internationally that may impact special education” (Leach, 2013, para. 3). Although there are countries where research could suggest that ethical codes overlap, substantial international stakeholders have varying degrees of ethics in relation to policy.

Analysis specific to the context of individual AAIS sites will be imperative to the theoretical discussion as well as application of solutions. Further explained in Chapter 2, analysis of policy as well as the gap in policy creation is required. A PESTE (political, economic, social, technological, environmental) analysis serves to inform stakeholders of key issues presenting currently, as well as historically, that can affect change.

### **PESTE Analysis**

Cawsey et al. (2016) identified change as shifts in an organizational environment and the factors that describe the environment of the organization. Resulting consequences would include complex international alliances. The framework of a PESTE analysis includes the provision of understanding similarities and differences between the curriculum-affiliated countries and the originating province’s educational system. Tracking these macro-aligned factors and their influence on the AAIS organization and their student bodies provides for endemic change.

Cawsey et al.'s (2016) PESTE analysis is applied to highlight five factors as change drivers: political, economic, social, technology, and economic.

### ***Political Factors***

The differences in overarching current and historical political viewpoints are challenges in the field of education. Whereas AAIS typically reside in countries with a strongly conservative political framework, the influencing curriculum is more liberal and social justice minded. The dichotomy between the two systems influences EDI practices in education.

### ***Economic Factors***

Social stratification plays a major role and impacts education. As a private sector school system, most AAIS sites can present as elitist in ownership, acceptance of students, and family associations, whereas the Canadian agency stems from a public education perspective. This difference creates challenges at many levels including student application and acceptance, funding, allotments for students with diverse needs, advertising to different student populations, and provision of supports equated with budgetary constraints.

### ***Social Factors***

The current social trend attempts to align with EDI policy at a Canadian level. The discrepancy between the social acceptance of inclusivity and the realities of the valuation of an individual with exceptionalities is more difficult to ascertain. The *TQS* (Alberta Education, 2020) highlights EDI, and an indicator includes fostering equality and respect in the school community with regard to rights as provided for in the Alberta Human Rights Act (2000) and the Canadian Charter of Rights and Freedoms (Constitution Act, 1982). The interpretation of the social ramifications of such documents are left to the stakeholders, as AAIS systems are not legally obligated to follow the statutory guidelines of another county.

### ***Technological Factors***

Although the concept of EDI may not be consciously aligned with technology, factors exist in the framework that are important for understanding context. In a framework designed for management and staff within education systems, these include risks of inappropriately selecting technology and the importance of having trained experts in technology to support staff and students (Morrison, 2016). School systems monitor technology involved in EDI strategies to ensure up-to-date computer systems, assistive technology, and management costs.

### ***Environmental Factors***

Key considerations to environmental factors are prominent in the EDI discussion. Given that many AAIS locations are within highly populated regions, this factor highlights building design considerations in addition to accessibility for students with mobility challenges. For example, one AAIS site with a low availability of real estate is housed within a three-storey building lacking an elevator. Washroom facilities are not designed for braces or wheelchairs. Physical inaccessibility and lack of adequate staff training to support children with mobility challenges is directly an EDI issue, as it affects access to equitable education (Anonymous, 2019).

This OIP addresses EDI through the lens of a theoretical perspective with the capacity for practical application. Cawsey et al. (2016) aptly suggested that change starts with a shift in the organization's environment. The factors of the AAIS communities include the amalgamation of traditional societies rooted deep in history and religion, and the changing demands of integrated Western educational paradigms. Leaders in AAIS, including superintendents, are participants in change. In a default position, they will accept multiple roles as change implementers and change initiators (Cawsey et al., 2016). The result is not the end but rather the process.

### **Guiding Questions Emerging From the Problem of Practice**

This OIP identifies challenges in consistency of EDI delivery, the implementation of resources, and the alignment between two educational systems existing in different societal paradigms. Transparency is important in leading EDI initiatives; leading in a transparent way that clearly communicates the school's vision and involves all stakeholders promotes trust in one's leadership (Dinsdale, 2017).

Critical dialogue, consideration of the interpretation of EDI terminology, and reflective practice of leadership rooted in social justice are key facets of global commitment. As influencing researchers in leadership and culture, Schein and Schein (2017) acknowledged that organizations may deny any culpability to avoid damage to the self-esteem of the institution or compromise their ability to achieve other values and goals. Discussion and ensuing questions relating to the PoP include the following:

1. Specific challenges present in some AAIS sites, including a hierarchical system driven by private interests and not public values. How do educational stakeholders in AAIS define EDI and demonstrate a consistent and transparent application based on the definition within the educational community?
2. Collaborative inquiry includes members of a professional learning community (PLC) working together to examine educational practices by exploring instructional outcomes, leading to guided instructional change. How can collaborative inquiry involving internal and external change leaders inform building EDI frameworks in a sustainable manner resulting in sustained accreditation?
3. Limitations exist for social justice-minded leaders in AAIS sites. EDI leaders in education share characteristics including attitude, resilience, and persistence

(Maxwell et al., 2014). How can transformative leaders incorporate traditional value systems that connect with modern definitions of EDI to build trust and increase active participation in EDI practices?

These challenges relating to the PoP can be conceptualized as existing in macro, meso, and microsystems (Bronfenbrenner, 1979). They include broad societal influences, the context of educational stakeholders within the system, and the students who benefit from a stronger framework within EDI. A careful analysis of these levels of systems identifies areas of consideration that have been factored into the solutions presented in Chapter 2.

### **Macrosystem Challenges**

The worldview of educational leaders may vastly differ from the cultural view. Stakeholders in the educational system of AAIS might experience cultural synthesis (Freire, 1970/2018). AAIS would qualify as a synthesized system that supports and gains support from the Canadian curriculum with the intention of transforming away from the alienation of individuals in their culture (Freire, 1970/2018). Caution must be taken, as confronting culture itself can be considered discriminatory. Careful consideration of respecting culture and religion needs to be upheld.

Cultural variations in the social valuation of the child with special needs are a major consideration. UNESCO's (2015) *The Right to Education for Persons With Disabilities* includes the following passage:

We raise the flag for education as a universal human right—no one must be denied access because of disability. This is a UNESCO priority, and we are acting across the world to break down barriers for people with disabilities, to empower them as agents of change.

This means transforming schools and learning centres. It means adapting teaching practices to cater for all. (p. 3)

From a global perspective, social justice in education and the associated political reformation required may not be at the forefront of a culture or society. Oplatka and Arar (2015) highlighted a democratic and liberal value system that may seem incompatible with autocracy, collective orientations, ascribed status, and obedience of a traditional society.

The historical system of despotic pedagogy in education has influenced policy and practice. Exploring Freire's (1970/2018) work of limit-situation lends further insight into the pedagogical underpinnings of societies that may not place value or worth from an economic or otherwise perspective on the individual with special needs. Further to Freire's (1970/2018) pedagogical ideal, examination of Western-object society and a compare-contrast with AAIS may provide a better understanding of national themes and the dominance of traditional philosophies.

### **Mesosystem Challenges**

Transformative leadership as a stakeholder worldview is another challenge. When developing the collaborative culture of the school, IE leaders are typically Canadian certified educators (Ontario Ministry of Education, n.d.). It has been my experience that those in AAIS senior leadership positions are typically also Canadian certified. Staff trained in more traditional postsecondary institutions present with different experiences and training in EDI. Although the role of the transformative leader is to influence agents to effect lasting change, Chirichello (1999) and Hoy and Miskel (1991) suggested that climate is a dimension of the social system in the organization. The PoP recognizes the relationship between the groups, the individuals, and their overarching worldviews.

## **Microsystem Challenges**

Challenges in my role as a consultant include site-based financial commitments for EDI and securing cooperation amongst educational leaders to enact change. Schools can simply end consultant services or choose not to extend contracts from year to year. Also included in such challenges, the broad definition of EDI has succumbed to multiple interpretations depending on the agency and leadership as outcome influencers. Brown (2004) argued for the evolution of leaders that demands “fundamental rethinking of content, delivery, and assessment” (p. 88). I am conscious that although I may be retained by school leadership, my client, from a moral and ethical perspective, remains the student who would otherwise risk exclusion.

How does the culture of the country and value system, including economy and policy, affect EDI, and vice versa? Alignment with Alberta policy would send the message that Alberta Education’s (2020) *TQS* would be upheld. Based on the direction from the provincial system, it would also meet criteria that alignment would enable international schools to provide the Alberta curriculum and credentials to their local students (Alberta Education, 2020).

## **Leadership-Focused Vision for Change**

Rooted in transformative leadership, the education system despite geographical location or societal influence is moving through a revolutionary change. The stages of unfreezing, changing, and refreezing (Lewin, 1947a, 1947b) continue to inform the discussion of leadership-focused vision for change. Educational leaders need to understand the system both as a whole and as components before change can occur; this understanding can be determined as unfreezing (Lewin, 1947a, 1947b). Within the very application process of participating in the AAIS program, schools have acknowledged the requirements. Change has been enacted. For this OIP, I suggest that the 14 of 17 AAIS systems—those in Tiers Three and Four—have moved into a

refreezing stage (Lewin, 1947a, 1947b). Implementation, within refreezing, can be viewed as a continuous process because change drivers require sustainable methodologies and supports leading to sustainable outcomes.

### **Gap Between Current and Future States of the Organizational Context**

Changes in governance and administrative leadership may result in reactive as well as strategic change, attempting a reorientation of EDI. Cawsey and Deszca (2007) suggested that this change is single and linear. From a theoretical perspective one could argue that although rooted within this change state, it is an infinite stage of establishing coherence and the organization's adaptive capacity. This capacity could be viewed as dynamic across different societal models, and infinite as the practice evolves. Educational leaders may be too focused on the principles of scientific management, rooted in reactive rather than proactive approaches (Shields, 2018). Instead, equity reformation in school systems in this context must go beyond the school (Shields, 2018). Transformative social justice leadership is a powerful force for change.

This OIP addresses the considerations of culture and the complexity of the agency within. Although two organizations from differing cultural perspectives creating an alliance suggest an amalgamation of directed practice, an authoritative position of influence exists. License for acceptance of historical practices requires the absence of hypocrisy and an understanding and respect of the deep-rooted culture, values, and familial respect that has built ethos.

A universal value of justice may be the core of educational reform in EDI. Therein lies the complexity of visionary leadership: The mutuality of the pedagogical relationship provides a foundation for respect of leaders towards the very society within which they function. Freire (1970/2018) reflected that agents in such dialogue not only retain their own identities but also



allow those participating to grow together. Careful consideration to the inequalities that promote continued oppression within the student body, staff, and members of the community is necessary.

The danger of this Westernized perspective, however, continues to lie in the lack of emphasis on preexisting value systems within a traditional society that may also align with those of the modern society. Current thinking may include likely contradictions between leadership for social justice in the Western sense and the basic characteristics of traditional society (Oplatka & Arar, 2015). Consideration of universal values of justice, consistent with Starratt's (2012) ethical themes of care, justice, and critique as noted in Chapter 2, may prompt the respect for leadership in traditional societies, as well as heritage, culture, and intergroup interactions that may closely align with modern societal values with regards to social justice in education.

### **Priorities for Change**

To accomplish the tasks identified by the administrative teams of AAIS sites, organizational as well as assessment tools are applied to inform outputs and resulting actions. Identifying stakeholder position, change readiness, and the growth within the present system informs the state of practices as an Alberta accredited structure while maintaining the identity of the society, culture, and its comprising systems. Informed by social theory and grounded in the works of Lewin's (1947a, 1947b) social science perspective, critical theory offers an evaluative lens into the issues of sectarianism, oppression, and unjust power (Freire, 1970/2018). These progressive changes by the transformative leaders in AAIS suggest that associated with the PoP, theoretical process can inform practice. This topic is discussed further in Chapter 2.

The current climate in private education demonstrates a strong interest in alignment for students to be provided with elitist opportunities in education. Outcomes can then provide data on the benefit to the country and its people. Freire (1970/2018) summarized that a vision for

change will require consistency between words and actions and faith in the people as stakeholders responsible for the outcomes of change.

This OIP seeks, through theory, to explore the evocative dialogue and reflective practice necessary to examine imperfections in a model of social justice leadership constructed by Western-based scholars in respect to universally based applicability (Oplatka & Arar, 2015). This exploration will improve situations for actors on the macro, meso, and microsystem levels (Bronfenbrenner, 1979) by strengthening global positions and improving the educational reputation. Benefits may also include positive labour relations for national citizens by promoting higher quality outcomes. For students with exceptionalities, improvements in EDI practice can equate to less dependence on social systems, increased participation in society as a valued member, workforce contribution, and the capacity to connect with globally positioned opportunities such as postsecondary enrolment outside of their country of origin.

### **Change Drivers**

Change drivers include external and internal forces. Internal change drivers include cultural imperatives, change leader pedagogy, and change leader behaviour (D. Anderson & Anderson, 2001). External change drivers can include marketplace, environment for change, business imperatives, and organizational imperatives. The modernist perception of EDI influencing guidelines can be viewed as external, as the need for change was initiated. AAIS sites are triggered to optimize operations at the mesosystem and microsystem levels, with an anticipated outcome of affecting society at a macrosystem level.

Linked to Lewin's (1947a, 1947b) three-stage change model, the unfreezing stage can be connected to developmental changes under the change drivers. Traditional change is reflected in the change state to fix a clearly identified problem. The unfreeze stage, where 14 of the 17 AAIS

organizations currently exist based on their tier status, is connected to the transformative aspect of change. The change requires a shift in mindset, and the outcome is not completely defined. Therein lies the importance of change readiness within these organizations.

### **Organizational Change Readiness**

This OIP adopts Lewin's (1947a, 19847b) three-stage change model to inform change drivers and the development of organizational change. Organizational readiness for change can be determined as the degree to which an organization understands the need for change and accepts it (Cawsey et al., 2016). Cawsey et al.'s (2016) change readiness questionnaire allows for a transformative vision by providing awareness for the change process. The rating scale includes previous change experiences, executive support, and openness for change, in addition to rewards and measures for change. A score above 10 suggests that the organization is ready for change.

Cawsey et al.'s (2016) change readiness questionnaire (see Appendix A) has been applied to determine organizational readiness for change. As an external consultant, I completed this formal assessment using the ABC School Division (a pseudonym) as a sample to represent AAIS organizations seeking Tier Four accreditation. Each location will present with different strengths and challenges, affecting the outcome of the scale, but ABC School Division can be considered representative of other Tier Three AAIS sites. The score for that site was 17, indicating that overall, the site is ready for change (Cawsey et al., 2016).

In fact, a readiness for change is implicit in the process of accreditation. For example, AAIS sites have applied for and have been accepted to the Canadian program. As such, they have been driven to meet accreditation requirements, which include goals for EDI. Even so, whereas the site-based staff at a particular AAIS site may be favourable to change and willing to engage in the change process, there can be resistance from those in senior management positions,

who have significant influence in the change process. As potential solutions are considered in Chapter 2, the rewards for change (accreditation, tier advancement, reputation) may be sufficient to move the change forward.

### **Force Field Analysis**

Given that this OIP addresses the alignment of one educational system between multiple unique contexts, a force field analysis (Cawsey et al., 2016) was applied to further identify AAIS systemic readiness for change as well as steps taken in the process to advance tiered placement (see Appendix B). A force field analysis defines forces that propel change and forces that oppose change. The changes in internal organizational structure and particularly the addition of a multitude of positions for student-focused supports have leaned increasingly towards a Westernized position of EDI. Further, integrating the importance of staff and student inclusiveness indicates a strong administrative direction for diversity and equity amongst current and future AAIS staff and staffing practices. External factors present as being more within the macrosystem, including culture and societal perceptions (Bronfenbrenner, 1979), as well as within the economic and political influences aligned with the PESTE analysis (Cawsey et al., 2016) described previously in this chapter.

The forces against change highlight the external barriers to organizational change. Societal valuation of individuals with exceptionalities within a historically conservative cultural context, and class conflict that has continued throughout centuries, suggest an antagonism towards particular individuals (Freire, 1970/2018). The revolutionary leaders in business—the stakeholders who position education and business within similar domains—may serve as forces for change when the theory of action involves an outcome meaningful for that context. As Freire

(1970/2018) has confirmed, this cooperative dialogue will be instrumental to managing and promoting these changes.

Based on the change management model, Lewin (1947a, 1947b) identified a transformative process that can be connected to the current workings of AAIS. The PoP addresses international school leaders striving to seek out-of-country accreditation with different value systems. Linking culture to purpose, Lewin's (1947a, 1947b) model suggests that these aspects can effect change on a systemic plane specifically by showing why the existing manner of process cannot continue.

Theoretically, it is simply not feasible to ingratiate the value system of one modernist culture onto a multitude of others without acknowledging and integrating the traditional societal values. Can elements of leadership for social justice provide compatibility between societies that are traditional or modernist, and what are the implications (Oplatka & Arar, 2015)? The external supports determined in the change process suggest that more traditional organizations will require additional influence based on their existing value schema of EDI. There will be positive and negative consequences. The change may affect the systemic nature of the culture of power (Freire, 1970/2018).

Cawsey et al.'s (2016) change path model, as an indicator of change readiness, aligns with Lewin's (1947a, 1947b) three-stage change model as a change process. Lewin (1947a, 1947b) identified unfreezing, the change stage, and the culminating refreezing as the framework to manage change of this enormity, particularly in cultures where change is not readily incorporated. Although Lewin can be considered a foundational theorist for organizational change, layering of Jones's (1991) and Simga-Mulan et al.'s (2005) work further supports the

change model best applied to current educational challenges. This perspective is addressed in Chapter 2.

### **Research to Support Organizational Change Readiness**

Two aspects inform organizational change readiness: the theory influencing the process and the context-driven research specific to AAIS and Alberta Education.

#### ***Theoretical Research***

To address the theoretical system at its most abstract yet often the most influential levels in organizational change readiness, literature provides context-specific support. Brahm (2002) examined the philosophy and pedagogy of the inclusive process and recommended further research. Fragments of change exist yet are embedded into the ethos of the school culture and require extension into the surrounding communities. Rizvi and Lingard (2010) proposed that education cannot compensate for society. Societal influence requires balance with a broad range of complexities not only within AAIS, but also addressing IE systems aligned with Western philosophies. The PoP and resulting OIP encourage the current system within the IE parameters to critically review practices within the guiding curriculum and long-term outcomes. As Burnes (2004a, 2004b, 2004c) has suggested, the association with Lewin's (1947a, 1947b) stages must be understood with other pillar theories, including field theory, group dynamics, and action research. Brahm addressed the discussions of stakeholders on the topic and raised the important question of the actual concepts and practices. Educational leaders must ask, "Are stakeholders perpetuating an absence of critical dialogue and conscious self-reflection by basing interpretation of the broad theoretical term of EDI on Western values?"

### ***Context-Driven Research***

An assumption is that the current Canadian system is informed by an ecological systems framework supporting independence for the student whom the system is designed to serve (Sallis & Owen, 2002). Consideration of the context of dependence on the social and family systems for young adults with disabilities is encouraged. In Alberta and reported by Alberta Community and Social Services (2021), the caseload for adults receiving social assistance funding as supports for barriers to employment reached 66,816 in 2019 (see Appendix C). Comparatively, the ratio of individuals with exceptionalities requiring social assistance between populations in the United States and remaining Canadian provinces are similar and growing. The United States has grappled with similar concerns, as noted by Shanker (1995), who called for a continuum of placements for children with diverse needs. There is a risk for AAIS programs, lacking EDI direction, to experience similar outcomes as students with complex needs transition to adulthood.

Historical viewpoints of students with exceptionalities have been rooted in an endemic oppressive system; the organizational change within AAIS is occurring at the micro and meso systemic levels and requires application at the macrosystem level (Bronfenbrenner, 1979). These pedagogical relationships and an understanding of the vision for the future has prompted current practices to continue to evolve and to thrive. This change is never complete and is a continuous process (Fullan, 2007). A cautionary indicator for traditional-context educational systems is that no perfect social justice school exists (McKenzie et al., 2008). The provincial ideology has serious complications that continue to present within the system.

### **Chapter 1 Conclusion**

The focus of this OIP includes the problem of Western-based EDI applied to traditional AAIS when accreditation and tier advancement is at stake. AAIS change leaders have

demonstrated a commitment to the progress of the school division. They face significant challenges that require specific, EDI evaluative standards to meet Albertan requirements. This Westernized perspective of transformative social justice leadership through education risks negating the value systems of traditional societies.

Connecting current value systems of traditional societies informing AAIS with EDI expectations of the modernist, Western society may provide change leaders an arena to align pedagogy. Self-reflection can provide a way for leaders to recognize educational values, philosophies, processes, and structures (Oplatka & Arar, 2015, p. 11). This self-reflective practice forces the discussion of possible bias in societal systems. In my role as an external consultant and change agent, an analysis of change readiness suggests that AAIS sites are ready for change. Change processes and solutions designed to support change leaders are explored in Chapter 2.



## **Chapter 2: Planning and Development**

Informed by the transformative leadership approach, Chapter 2 guides planning and development of change for educational leaders within AAIS. The change path model (Cawsey et al., 2016) has been chosen to determine change readiness as noted in Chapter 1. Chapter 2 blends Lewin's (1947a, 1947b) three-stage change model to inform the change process layered with the theoretical foundations of Capper (2019), Freire (1970/2018), and Shields (2018). More recent to the discussion of leadership theory, Bush's (2018) concept of contingent leadership also informs the work of EDI in AAIS. A critical organizational analysis defines change needed. Possible solutions to the problem and ethical considerations are presented in response to the complexities of EDI in modern and traditional educational organizations.

### **Leadership Approaches to Change**

The PoP addressed in this OIP is the challenge to support educational stakeholders in AAIS to bridge EDI practices between modern and traditional societal paradigms to meet accreditation standards. The determination of program accreditation by the Western organization adds a layer of complexity to the leadership approach. The current system can be viewed as one that has consistently shown a dynamic process over time (Foster, 1986). Although the mission, goals, and expectations are defined by the *TQS* (Alberta Education, 2020), the leaders' moral purposes and values (Bush, 2020) inform the approach to change.

At the root of the discussion lies humanism and the leaders' beliefs in the potential of their people (Freire, 1970/2018). The structure of humanity is greatly affected by economic and political divides. There is a political risk to critical education, one that demands an educational leader to name and transform the deliberation. In this case, the issue at hand is EDI practice in AAIS: A false assumption is that because the framework for such accreditation is in place, the

process exists. AAIS educational leaders can bridge the gap between stakeholders and create a commonality of EDI belief systems informed through the lens of transformative leadership.

### **Transformative Leadership**

Transformative leadership begins with questions of justice and democracy, critiquing inequitable practices, and promising individual achievement as well as societal gain (Shields, 2020). As this OIP determined in Chapter 1, AAIS leaders are ready to enact change (see the change readiness analysis in Appendix A), and transformative leadership can be envisioned as the leadership approach to this problem built upon critical theory. Critical theory highlights the development of processes to challenge the status quo (Capper, 2019). Heritage and history have determined the existing structure and continue to comprehensively influence external stakeholder positions within family, community, sociopolitical, and economic authorities (Capper, 2019). Leadership principles and practice, from a theoretical standpoint, benefit from problem-posing education. Freire (1970/2018) identified this reality as a human–world relationship, suggesting that to engage in authentic change, leaders must see their current state as limiting and therefore want to challenge the status quo.

Accreditation presents the confirmation that a pedagogical agreement between the two systems—Alberta and the host country—subsists. The historical composition of AAIS systems includes the significance of culture, creating a twofold dilemma for leaders: (a) to respect and uphold a strong and proud culture of people who are well rooted in their societal beliefs, and (b) to align with a Westernized program that may not necessarily coexist with the aspirations, motives, and objectives of traditional society viewpoints.

Transformative leadership can set change in motion. Leaders positioned for transformative change at the senior leadership level in AAIS systems include superintendents,

principals, and inclusive coordinators. My work with these leaders has confirmed that they present with the pedagogy and training of EDI, and leader characteristics of self-awareness, critical reflection, and critical consciousness (Shields, 2018). The evolution of influential leadership and capacity for change within AAIS have been designed to lead intentional outcomes. This capacity of intentional influence is the purposeful and guided practice of trust, respect, and collaboration between administrative leaders and external stakeholders (Yukl, 2002) and can shift the authoritative process. To promote “deep and equitable change” (Shields et al., 2017, p. 3), transformative leadership provides a contemporary, dynamic vision for EDI that promotes independence, power, equity, and justice for all learners.

### **Change as Transformative Leadership**

Change leaders benefit from understanding what aspects of organizational change need to occur and how to create such change (Cawsey et al., 2016). Barriers to change require attention, as process and content within a learner-centered environment can differ greatly from the acceptance of external influence and historical values. AAIS systems may effectively address positive aspects while considering continued problems with current practice in Canadian schools. As stakeholders of AAIS align themselves with modern curricula, they move from resistance in the change profile into acting on the change continuum (Cawsey et al., 2016).

Critical and evaluative processes will be instrumental in aligning culture and long-term goals with directives from the provincial education system. These changes are representations of transformative leadership. “Models of learning and theoretical frameworks provide developers with ready-made templates and vocabularies through which to help faculty members examine, name and refine their epistemological frameworks for teaching and learning” (Fostaty Young, 2008, p. 41). Fostaty Young’s (2008) work addresses the importance of providing truly equitable

access and sustainable change encompasses the celebration of historical change and change drivers not as static entities but as moving forces. Lewin's (1947a, 1947b) model lends itself to this process. Theory associated with Lewin's (1947a, 1947b) refreezing stage highlights the challenges of commitment and cultural synthesis (Freire, 1970/2018).

### **Theoretical Foundations**

Alberta Education's (2020) *TQS* can be viewed as a universe of themes (Freire, 1970/2018). The subthemes created within associating documents may conflict with the cultural belief systems in AAIS host countries, resulting in a limiting situation. It is essential for AAIS leaders to participate in the change process with an increasingly critical role as change leaders within the transformative process. This social entity, as determined by the work of Freire (1970/2018) and Capper's (2019) critical theory, supports education transformed within itself.

Although a resilient emphasis has existed within a transformative practice of leadership, Shields (2018) addressed the transformative leader as one who looks towards pedagogical relationships in their complexity and recognizes the power differentials. Good intentions are insufficient; social justice leaders should serve traditionally marginalized societies and dismantle societal norms that privilege only certain students (Shields, 2018). In the response to social justice across AAIS boundaries, Western perspectives on educational reformation in EDI require the understanding that social justice is, as Oplatka and Arar (2015) suggested, an elusive construct. The reality of such transformative change demands respect and integration of traditional societal practices.

Transformative leadership has been chosen to facilitate foundational, forward-thinking change, yet there are limitations. Transformative leaders may affect individual leadership practices by providing change agents with clear directives of the "why" and "how" of change.

This approach lacks acknowledgement of social justice inequities or activism (González et al., 2019). Therefore, adding contingent leadership (Bush, 2020) to transformative leadership may offer a solid framework that addresses the complexity of the current societal perceptions of EDI (Shields, 2018). Contingent leaders adapt their leadership to the situation (Vroom & Jago, 2007). A contingent leader may adapt the successes of internal stakeholders at the school level to demonstrate the change needed at a societal level. At a global level influencing societal change, the EDI change process may provide an organization with demonstrable success.

### **Framework for Leading the Change Process**

The cultural and educational complexities of the PoP, as viewed through a transformative lens, demand a blended change process. The change process model most relevant to this OIP is the change path model (Cawsey et al., 2016), strongly influenced by Lewin's (1947a, 1947b) three-step model of change (unfreezing, changing, and refreezing) and Schein's (1996) extension of the Lewin model. My proposed blended model applies to the dynamic context of AAIS spanning multiple countries with varying societal contexts. The blended model supports the supposition that continued reform is attributed to social change (Dickens & Watkins, 1996).

#### **The Change Path Model**

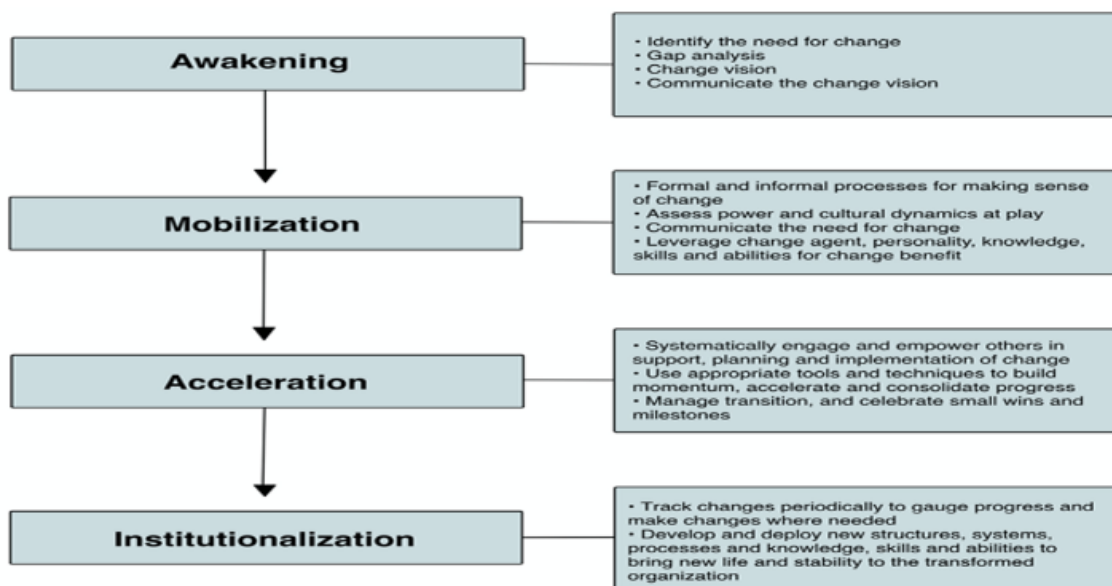
Supporting Lewin's (1947a, 1947b) theory and moving to practice, Cawsey et al.'s (2016) change path model is applicable to this OIP. Specially aligned with a systems-level view, Cawsey et al.'s (2016) model aptly reflects the complicated organizational level factors of the different AAIS locations, including operations, control, and measures. Applied to the current framework within AAIS, the systemic factors include the change recipients of the school as an internal function and the change agents as educational leaders within the internal community. It

addresses the system-wide influence of external stakeholders, including the community, the Board of Directors, and owners of the private systems.

The change in this OIP is continuous, as noted by the changes already occurring within AAIS. For example, 3-year strategic plans at one AAIS site clearly reflect a continuum of change, and goals include the emerging EDI practices within the internal environment ([ABC School Division], 2020). Based on the change readiness assessment (Cawsey et al., 2016; see Appendix A), with a representative sample score of 17, Tier Three AAIS sites are positioned for change. Cawsey et al.'s (2016) change path model provides a framework within this OIP to highlight specific directives necessary to enact change (see Figure 3). Four steps to change guide the framework: awakening, mobilization, acceleration, and institutionalization.

### Figure 3

#### *The Change Path Model*



*Note.* Adapted from *Organizational Change: An Action-Oriented Toolkit* (3rd ed.), by T. F. Cawsey, G. Deszca, and C. Ingols, 2016, p. 60. Copyright 2016 by Sage.

### ***Awakening***

The awakening step identifies that staff are aware of the need for change (Cawsey et al., 2016). Most are mandated by their professional teaching association (Alberta Teachers Association or other provincial agency) to follow *TQS* (Alberta Education, 2020) mandates, including EDI practices. Although site-based change agents at AAIS are aware of the need for EDI-driven change, stakeholders in senior management may be less informed of onsite application and may benefit from consultation and professional development opportunities.

### ***Mobilization***

The mobilization step addresses making sense of change and communicating the change process (Cawsey et al., 2016). The communication for change at AAIS has been ongoing and reflected in yearly planning documents, as well as at the senior leadership level regarding accreditation monitoring. Changes in administrative staffing positions have ensued (see for example [XYZ School Division], 2021), strengthening the change process due to Western-trained educators having completed postsecondary coursework regarding differentiated practice, diversity in classrooms, and equitable learning.

### ***Acceleration***

The acceleration step includes planning and implementing change as well as managing transitions (Cawsey et al., 2016). I consider Tier Three AAIS organizations to be in the stage of acceleration. Developing credible and sustainable solutions will be pertinent in responding to the needs of the diverse AAIS community and achieving Tier Four accreditation.

### ***Institutionalization***

The step of institutionalization is when the change becomes stable in the organization (Cawsey et al., 2016). In the context of this OIP, it addresses reacculturation within the

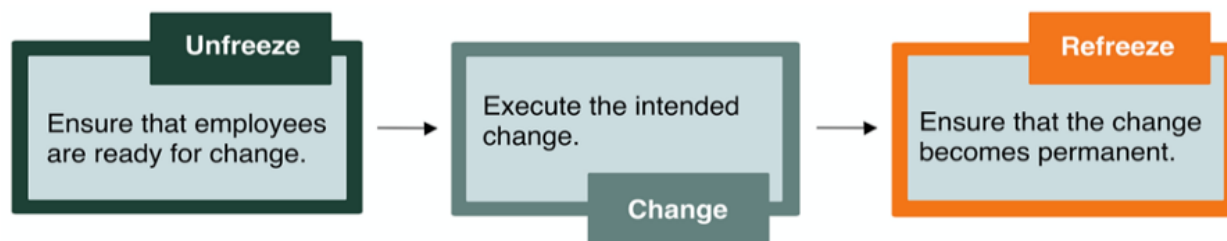
complexity of multiple societies. This process can be viewed as a symbolic representation of the cultural work necessary to accept EDI practices. Achieving outcomes associated with EDI would then transform other areas, as addressed in the PESTE analysis in Chapter 1. I would consider the single AAIS Tier Four site to be in the stage of institutionalization.

### **The Three-Step Model of Change**

Lewin's (1947a, 1947b) work, as interpreted by Dickens and Watkins (1996), indicates that the entire system in its natural environment creates goals to incite revolution, and thereby change is made. This continued commitment to group decisions and improvement supports the conceptual framework of Lewin-informed discussion. Change in this regard is an iterative process. Dickens and Watkins clearly associated reform with social change, an outcome that aligns with the goals of the AAIS to meet the requirements of the *TQS* (Alberta Education, 2020). Lewin's (1947a, 1947b) process is action research oriented and includes continued dialogue (Capper, 2019; Freire, 1970/2018). This approach supports reflexive and ethical discussion (Dickens & Watkins, 1996).

An important aspect of this change process model seeks not only to involve but also to support change as a cyclical process of research and action (Dickens & Watkins, 1996). The change process under Lewin's (1947a, 1947b) theory can be fluid between the three stages, allowing the evolution of cogenerative dialogue between change agents and stakeholders to address deficits and seek solutions (see Figure 4). Lewin's three-stage change model (1947a, 1947b) addresses possible resistance to change and the motivation not only to accept change, but to embrace it. The solution through the eyes of Burnes (2004a) is not that the end would justify the means; it would suggest that the end reflects the means.



**Figure 4***Lewin's Three-Stage Change Model*

*Note.* Adapted from “Organizational Structure and Change,” by Saylor Academy, 2012, in *Principles of Management*, Section 7.5, Planning and Executing Change Effectively ([https://saylordotorg.github.io/text\\_principles-of-management-v1.1/s11-organizational-structure-and-c.html](https://saylordotorg.github.io/text_principles-of-management-v1.1/s11-organizational-structure-and-c.html)). Copyright 2012 by Saylor Academy.

The complexity of EDI practice and societal as well as religious and political beliefs differ from Westernized philosophies. AAIS may best address their change process as infinite. This infinity is a spectrum of research, planning, and developing within the context of change (Cunningham, 1993). The reformation of EDI practices in AAIS continues to evolve. Leaders are increasingly cognizant of the importance of Lewin’s (1947a, 1947b) unfreezing conception not as simplistic and linear, but instead as one of schematic flexibility. Hussein et al. (2016) addressed Lewin’s (1947a, 1947b) stages as a constructivist framework. The change process includes social implications for enhancement of the process. To best define these stages in the context of this OIP, the three areas of Lewin’s three-stage change model are further explored:

***Unfreeze Stage***

In the current educational climate and with accreditation guidelines, many AAIS stakeholders have recognized the need for change (see Appendix D). Given that AAIS are accepted into the provincial program, one can assume that even those in Tier One have

acknowledged the requirements of the *TQS* (Alberta Education, 2020). Examples of unfreezing include gathering information, planning objectives, and providing resources. It will be crucial to engage the current hierarchical system, which includes influential community leaders, administration, specific learning teams, and support services.

### ***Change Stage***

AAIS align with mandates to determine intended outcomes. Implementation of mandatory requirements, including strategic plans, are in place. The change process includes the broad and diverse opportunities provided to internal stakeholders in coaching, peer mentorship, and professional development opportunities to build capacity in areas directed towards EDI.

### ***Refreeze Stage***

Leadership continues to ensure the process of change is consistent in this stage. This final stage is dynamic. It demands continued monitoring and evaluation to ensure that as changes develop in the EDI community, the AAIS site remains responsive. The requirements of the *TQS* (Alberta Education, 2020) suggest that change is presented with a sense of urgency and the process requires the development of strategic plans. Lewin's (1947a, 1947b) change model suggests a robust and executable model that has withstood the test of time. Schein and Schein's (2017) extension provides execution tools for change agents to adopt resilient change in the face of evolving EDI practice. The fluidity (Burnes, 2004b), when examined through the lens of the iterative process and aligned with Lewin, adapts to a sustainable process of change.

### **Relevant Types of Organizational Change**

Specific approaches for leading change in the context of AAIS and my position as an external consultant include strategic and incremental change. Nadler and Tushman (1990) defined these two changes together, as they impact the whole system and selected components of

an organization. The strategic adoption of EDI includes the adaptive infrastructure to support the changes as presented. Appelbaum et al. (1998) suggested that infrastructure includes the human resources, systems, and technologies being considered for successful change to occur.

Incremental change suggests minor changes to adopt a reformation rather than a revolution.

Whereas small changes such as incorporating more inclusive terminology within the internal workings of the system could be appropriate, they may not hold the strength necessary to instigate true change. Adding an iterative incremental change process provides a platform for change agents to assume change in a dynamic unity. The iterative process is one of successive refinement.

Historically, AAIS leaders could be determined to have instituted reactive and anticipatory changes. Progress within the site-specific organizations has led to 14 AAIS systems achieving higher-level accreditation tiers, suggesting that considerable progress has been made to meet mandated requirements not only in EDI but also in curriculum development and assessment processes. Specific to my agency, I could assume that reorientation of the current change framework at a given AAIS site may be less successful due to resistance from senior management to shape change and distribute power. Most sites have broadened their management structure to include supportive roles to the superintendent as well as early succession planning practices for administrative positions. These incremental changes at the systems level may provide increased engagement and consistency for school leaders.

Reorientations are frequently driven by new leadership from outside of the organization (Nadler & Tushman, 1990). Further explored as possible solutions to the PoP, the challenges as well as benefits of an incremental and strategic organizational change approach include the system (site-based, senior leadership) and the structure of AAIS (senior management). In my role

as an external consultant, I look to incremental change to determine a gap analysis in EDI practice at the school-based level (discussed further in this chapter), model strategies for successful integration of the *TQS* (Alberta Education, 2020), and form trusted relationships with teachers and paraprofessionals. These changes occur within the frame of reference of the organization (Nadler & Tushman, 1990).

This change approach is ongoing, and school-based change agents are accepting of the proposed change due to their training and position within the system. Stakeholders in these environments are typically Western trained and prealigned with EDI as defined through a modern lens. Strategic organizational changes are structural in the context of consultation from an EDI-specific educational consultant such as myself. Consultation and the inherent recommendations bear more risk of failure due to resistance in the change of core values within the potentially more traditional perspectives of AAIS senior management. The individuals within these roles have presented with a past reluctance to diffuse leadership, and my role will continue to offer the facilitation of executive team building. Fortunately, senior management and senior leadership roles to enact change are already in place in many AAIS sites, although the power and agency within these roles can present as unequal and authoritative. Can a structure bound by the worldview of historical limits engage in a revolutionary dialogue?

When based solely on Lewin's (1947a, 1947b) conceptualization, the three stages of change would appear to be the most sustainable and holistic. For true reformation and revolution to occur, one must accept that change could be interpreted as oversimplified (Cawsey et al., 2016). This process of change becomes increasingly authoritative and less participatory, creating clear divisions between the systems within the structure. Instead, consideration to the interconnectedness between the existing systems can initiate change while moving through a

continuous and nonlinear process. In determining “what” to change, Cawsey et al. (2016) suggested that change is a continuous process that expands itself towards an equilibrium throughout the entire organization.

### **Critical Organizational Analysis**

AAIS organizations are managing complexities of change. Accreditation mandated by the *TQS* (Alberta Education, 2020) involving what to change, when to change, and why to change, is not optional. The dilemma—both pedagogically and practically—lies within how to change. The desire to improve the effectiveness of a given AAIS site must address components that include the very features of culture, systems, and goals that are affected by the internal and external environments. The change path model (Cawsey et al., 2016), integrated with the issue-contingent model (Jones, 1991) and Bush’s (2018) contingent leadership theory introduced in the Leadership Approaches to Change section, provides a platform for gap analysis.

EDI is rooted within ethical decision-making. The framework of the *TQS* (Alberta Education, 2020) provides a moral interpretation of Westernized values and belief systems. It presents a moral issue (Velasquez & Rostankowksi, 1985) as consequences for others and the moral agent responsible for such decisions are factors. A gap analysis serves to strengthen leader decision-making processes and attain the described outcome: to create sustainable organizational change (Jones, 1991).

The intensity of moral discussion is complicated. Jones (1991) highlighted that within the issue-contingent model, the intensity of stakeholders concerned with moral issues tends to increase with their own personal involvement or consequence. Although this model would ascribe to the current environment of AAIS sites, including administrators, staff, and parents, it may not necessarily lend itself to cultural or societal change.

The terminology of human rights and democracy is derived from a modernist society. Oplatka and Arar (2015) questioned whether members of an autocratic society understand the full meaning of these terms. If critical reflection and evocative dialogues are grounded in a modern value system (Oplatka & Arar, 2015), is it fair to assume that change leaders in traditional societies will be critical activists for EDI, social justice, and educational reformation?

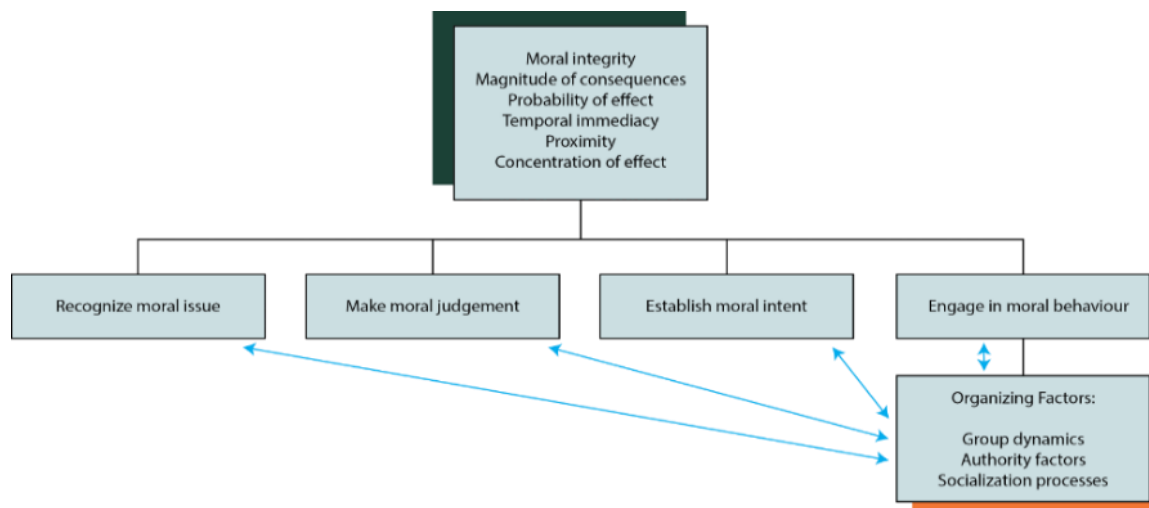
One can look at an organization in this regard as a “stacked deck” (Jones, 1991; Smith & Carroll, 1964) comprising individual viewpoints, environmental influences, and hierarchical relationships. The moral intensity of the issue of EDI has a substantial influence on decision-making and behaviour in all stages of organizational change. Thus, the change path model (Cawsey et al., 2016) is integrated to assign a more comprehensive and objective process to the discussion of a gap analysis. As depicted in Figure 5, Jones (1991) provides context to the discussion of ethics in organizations.

The change path model (Cawsey et al., 2016) configures to the current PoP as it addresses the consideration of two aspects of change: episodic change and continuous change. The changes faced by AAIS occur more in the episodic stages, as they require the continuous practice of EDI, addressing cross-cultural dynamics and external influences on outcomes. Returning to Lewin (1947a, 1947b, 1951), this dynamic situation of change offers that the actual state of change is not based on one event or occurrence. It provides pedagogical leadership with a conceptual framework to apply to current and future practice.

The change path model (Cawsey et al., 2016) acknowledges the historical rigidity that has been present within existing relationships and beliefs. Moving towards a more concrete approach and building upon Lewin (1947a, 1947b, 1951), the work of Cawsey et al. (2016) looks to a gap analysis in processes driven by reflective practice and dynamics within an organization.

**Figure 5**

*An Issue-Contingent Model of Ethical Decision-Making in Organizations*



*Note.* Adapted from “Ethical Decision Making by Individuals in Organizations: An Issue-Contingent Model,” by T. M. Jones, 1991, *The Academy of Management Review*, 16(2), p. 370.

Copyright 1991 by Academy of Management.

### **Gap Analysis**

A divide exists between traditional and modern education systems from EDI definition through practice. A gap analysis determines needs and identifies problems before the plan of action (Munger & von Frank, 2010). This section presents an actor analysis and a policy analysis.

### **Actor Analysis**

Relevant actors in the policy area include provincial education authorities in Canada, Boards of Governors of private schools globally, school administration, superintendents of schools, teachers, and staff. As an external consultant, I have determined that the most influential gap exists within AAIS sites at the level of senior management and remaining change leaders. Connecting Bronfenbrenner (1979), this level includes the macrosystem of societal perceptions

surrounding EDI and the mesosystem of connections within the AAIS, including teacher–parent, administrator–teacher, and senior leadership–administration. These actors, as noted in Table 1, present with varying degrees of influence.

**Table 1**

*Actor Analysis*

Actors in policy area	Priority	Actors' reason for exerting influence	Degree of influence	Alliances or oppositions
Provincial education authorities in Canada	High	Presides over current Teaching Quality Standards, able to grant or revoke diploma granting status and accreditation. Must uphold current Canadian EDI practice.	High: Position of power and influence	Alliances with Boards of Governors, superintendents, global educational authorities.
Boards of Governors of private schools (global)	High	Guided by religion, culture, socioeconomic, and political factors. Typically used to a high degree of influence with little influence from outside agencies.	High: Have historically had determining power in all decisions as board members are often owners of the private school systems.	Alliances with Superintendent, influential families, political parties, religious leaders; Opposition—alternative schools who strive to achieve a Western-aligned status.
School administration	Medium	Guided primarily by the direction of the board, however accountable to the associating provincial standards.	Low: Can implement EDI practice strategies and are typically Canadian educated; require full support from parents and Board.	Alliances with the Ministry of Education, the superintendent, the Board, and parents; may experience opposition from the Board.
Superintendents of schools	High	Typically, Western trained with a pedagogical commitment to EDI as defined by Western standards.	Medium: Follow the directions of the Board of Governors.	Alliances with all AAIS departments and the provincial Ministry of Education.
Teachers and staff	Low	Typically, Western trained with a pedagogical commitment to EDI practice as defined by Western standards. Responsible for the <i>Teaching Quality Standard</i> to maintain their certification as educators.	Low: Compliance is recognized while opposition is not supported.	Alliance with all parties; may experience opposition from differing social groups and parents regarding classroom practices or enrolment.



### *Policy Analysis*

An issue with gaps in policy includes the challenges between rhetoric and practice (Trilokekar & El Masri, 2017). Alberta Education's revival of a 2004 ministerial order on inclusive practice provides an example of such a challenge. The *Standards for Special Education* (Alberta Learning, 2004) outlined a framework to address the economic, sociological, and moral/ethical struggles of EDI in Alberta schools. The ministerial order includes sections of access, appropriateness, accountability, and appeals (Alberta Education, 2013).

Given the subjectivity and age of the ministerial order, Alberta Education (2018a) included a policy on EDI in its *ECS to Grade 12 Guide to Education: 2018–2019* that stated:

To support children and students in attaining the goals as stated in the *Ministerial Order on Student Learning*, school authorities must ensure that all children and students (Kindergarten to Grade 12), regardless of race, religious belief, colour, gender, gender identity, gender expression, physical disability, mental disability, family status or sexual orientation, or any other factor(s), have access to meaningful and relevant learning experiences that include appropriate instructional supports. (p. 31)

The issue of this policy can therefore be determined as such: The inclusive education policy (historically prior to the term of EDI) as stated in Alberta Learning's (2004) Ministerial Order addresses the theoretical multifaceted rights of all students regardless of presentation. Policy is required to address theory, methodology, and application when supporting all learners within AAIS and to address the ministerial order. Monitoring and evaluating frameworks are required as a process over the lifespan of an initiative (Markiewicz & Patrick, 2016).

Agreement to the contractual obligations of being held accountable to the originating provincial education system would suggest that EDI practices are being implemented. This

commitment may not be true at all AAIS sites. It will be crucial to identify transformative changes to allow the empowerment of relevant agents at AAIS sites as active drivers in the implementation and sustainability of EDI.

Theory provides a clear and contextual paradigm in which to design collaborative, EDI practices in AAIS. The needs of the student at the microsystemic level are budget worthy, yet the meso and macro systems continue to wield the power in the decisions to adopt or omit EDI practices. By asking what to change, rather than how to change, there is a disconnect between theory and application of the initial policy. This presents a barrier for actors in the policy arena based on the lack of framework for practical outcomes.

The resulting action is the consideration of solution-focused work. To address the PoP, priority should focus on senior management and leaders as well as those directing guidelines from the accrediting province. Although teachers, staff, and administrators present as change agents, their capacity to already engage in the change process has been demonstrated. My role will be to provide the connecting link between the internal system and the broader, more politically and economically directed structure of AAIS. This link may most successfully be completed as policy for praxis strengthened internally through a dedicated AAIS organization's senior management position.

As leadership, change, and decision-making are consistently determined by facts and values (Foster, 1986), critical theory as applied to the inclusivity of educational reform encourages a power within communication. Communication with the people elicits cooperation and fusion; the result could very well become unity (Freire, 1970/2018; Guevara, 1968). Freire (1970/2018) further challenged this process with the concept of indispensable unity and

questioned how educational leaders can sharpen the epistemological clarity. The proposed solutions could foster this outcome of unity within the organizations.

### **Possible Solutions to Address the Problem of Practice**

The theoretical perspective of this OIP is to address the existing frameworks of EDI and explore how leaders in AAIS organizations can incite change. Three solutions are considered in this section: (a) maintain the status quo of internal change agents and leadership; (b) create an AAIS internal position for an EDI policy analyst; and (c) implement a radical solution prescribed from Alberta Education to AAIS for policy including increased accountability for EDI practices.

Each solution is considered in terms of social justice and the humanistic factors, yet this OIP also aligns with the fiscal responsibility and economic influence of EDI practice. Through the lens of critical theory (Capper, 2019), Freire (1970/2018), and the work of Shields (2018), and integrated with the issue-contingent model (Jones, 1991), solutions address the strong conceptual framework of leadership development within a morally sensitive agency. Deming's (1982) Plan-Do-Study-Act (PDSA) cycle is applied to better inform the preferred solution.

#### **Possible Solution 1: Maintain the Status Quo**

Recognizing the strength of current administrative leadership at AAIS sites and the ongoing evolution of process and procedure within EDI practice, maintaining the status quo could be perceived as a practical solution. AAIS locations already have comprehensive strategic plans and a deep commitment from internal stakeholders (staff). Current systems within the agency of AAIS, including the recognition of staff and student-centered diversity, have emerged as strong initiatives within the structure and systems as a model of leadership. These developments suggest that AAIS leaders may experience success within the current framework.

This solution would include that AAIS leaders continue to build capacity internally within the framework, often with the guidance of an external consultant such as myself. Commitment to EDI at all levels is noted, from Freire's (1970/2018) perspective of theoretical liberation in education to the transformative leadership phase of Shields (2018). Strategies of eliminating deficit thinking, deconstructing inappropriate assumptions, and engaging in difficult conversations would help to inform the process (Freire, 1970/2018).

As context is a key consideration, this solution demands that all levels of governance support systemic changes. The focus lies in global awareness and the complex impact of EDI. Both Lewin's (1947a, 1947b) three-stage change model and Capper's (2019) critical theory support internal change agents applying EDI practice. Internal systems are constrained by a multitude of factors, including societal beliefs regarding individuals with exceptionalities, conservative religious views, and economic factors at play in privatized school systems. Change leaders may not be able to further perpetuate the forceful revolution of changed perspectives or, ultimately, best practices across a multitude of systems.

Deming's (1982) PDSA provides an iterative cyclic process to articulate the change process. Due to the degree of differences within site-specific locations of AAIS, I completed the PDSA based on the ABC School Division as an exemplar for the broader collection of schools. As applied to this solution, weaknesses are apparent in all four areas. The solution describes the current context (Plan) and would have been the ongoing process since the school's initial accreditation with AAIS (Do). Leaders have expressed interest in augmenting EDI practices (Study). The current practices of EDI continue to be in place although macrosystem changes have not been evident (Act).

It is pertinent to reflect on the issue of morality and focus on the moral issue, not the moral agent (Jones, 1991). The consultant relationship is instrumental to this solution. The ethical dimension of contractual rights and duties by administrative leadership within the AAIS sites is influenced by the reciprocal relationship of societal and cultural determinations. As one change agent who could influence the system, I am constrained by my inability to enact change when influential stakeholders have the final direction in recommendations. This limitation would affect any consultant hired to assist AAIS leaders with EDI work.

In their application of the issue-contingent model, Simga-Mugan et al. (2005) highlighted differences in power distance and individualism versus collectivism. The cultural observation of universal values and concepts of right and wrong vary considerably across national boundaries and in subcultures (Schwartz, 2002). Ethically sensitive judgement may be applied on three levels of influence: principle-related, agent-related, and society-related (see Figure 6). This concept is further discussed in the Leadership Ethics and Organizational Change section.

### **Possible Solution 2: Create an Internal Position of EDI Policy Analyst**

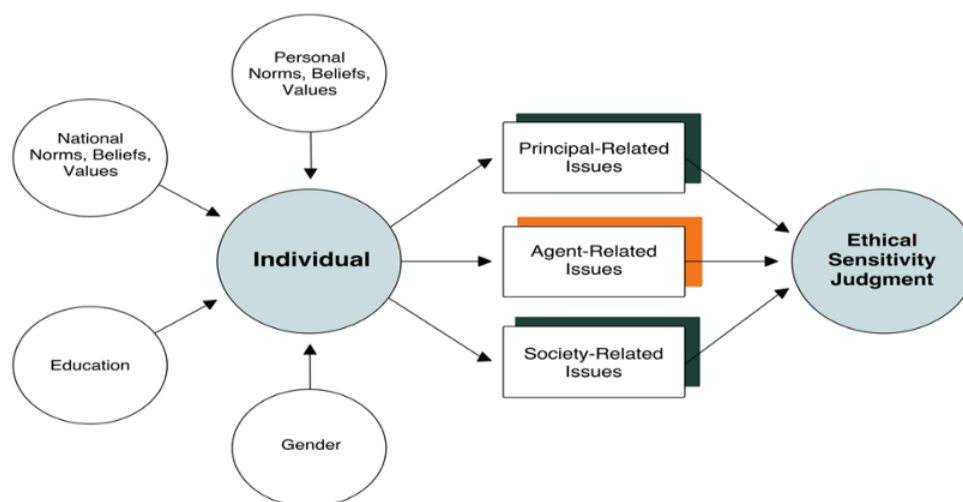
Although implying a supracultural position, this solution, to create an internal EDI policy analyst position, may serve to force internal leaders to accept external change on a publicly and historically accepted system of rules that defines EDI. A challenging aspect pertinent to the EDI practice discussion includes the aspects of power and agency regarding the sociology of policy.

Mediating factors of policy change can be found within the network of the epistemic educational community. Actors engage in bargaining, developing policy aims, and contesting ideas within their sector as well as the larger social and political world (Howlett et al., 2017). As an agent of change with authority and a representative within senior management, the EDI policy analyst would be responsible for examining the existing policies, laying the groundwork for

new programs, and building legislation to meet new goals. Each AAIS site would create this position, and the collective EDI policy analysts would collaborate to move towards consistency in EDI policy directives. AAIS senior management may express concerns of denationalization and the loss of control in their educational systems (Ball, 2012). The support of intellectual education-preneurs, such as EDI policy analysts, may improve policy debate and therefore enact true and sustainable change on a global scale.

### Figure 6

*Proposed Model of Influence on Ethical Sensitivity Judgements*



*Note.* Adapted from “The Influence of Nationality and Gender on Ethical Sensitivity: An Application of the Issue-Contingent Model,” by C. Simga-Mugan, B. A. Daly, D. Onkal, and L. Kavut, 2005, *Journal of Business Ethics*, 57(2), p. 140 (<https://doi.org/10.1007/s10551-004-4601-z>). Copyright 2005 by Springer.

This solution would align with current mandated EDI practices (Plan), garnering acceptance from senior management and administration as the position is part of their agency. If EDI policy were to be in place, senior leaders may strengthen the alliance through compliance

(Do). The solution would provide policy to support sweeping change amongst AAIS sites, as well as build framework consistency (Study). Implementation would require active engagement from senior leaders with clear evidence on the benefit of participation. This equates to a beneficial relationship with supportive services in the application of EDI practices (Act). Overall, this is the most comprehensive solution respecting both traditional and modern systems.

Incorporating a policy network with aligned subsystems may provide AAIS leaders the platform to demand relevant change within their organizations. Even though schools are undifferentiated subsystems (Howlett et al., 2017), the subsystem actors in this context (EDI policy analysts) would share common beliefs, knowledge of the problem, and a common interest in pursuing a solution (Weibe & Nohrstedt, 2012).

The alignment of strong networks outside of the current agency within AAIS strengthens the position of educational leaders through predetermined influence within the stakeholder community. When addressing this context in relation to the issue-contingent model (Jones, 1991), the law of agency results in a contractual relationship between agent and principal that intensifies the work of the strategic plan by eliminating competing power coalitions and creating moral constraints (Simga-Mugan et al., 2005). Ideally, the EDI policy analysts would serve as brokers between groups, acting as liaisons to connect the subgroups (see Appendix E).

Support for this solution may be found as an indicator of concrete relationships and the mutuality of the pedagogical relationship (Shields, 2018). Inequities will always be present between those in formal and informal positions (Freire, 2000). However, this divide may be lessened through the change in ethical judgements and moral standards. This reduction may be accomplished by internalizing the process within the network itself and relying on the influence of EDI policy analysts in senior management positions to be ethical change agents.

Ethical sensitivity is highest when the interests of the agents are at stake, and higher when what is at stake includes the interests of principals compared to society or third parties (Singamugan et al., 2005). The overarching network in a systemic framework suggests that alignment of a transformative epistemology may reduce risk and support collaboration. Sabatier (1998) defined this role as an actor who will keep the level of political conflict within acceptable limits. From an evaluative perspective, this solution lends itself well to the present situation of schools that are transforming within their internal environment to build increased awareness surrounding EDI. However, constraints within this solution include the potential for senior leaders to hire based on their own possible bias regarding EDI. The ability for stakeholders, including principals, to influence the hiring of an EDI policy analyst will be imperative to effect change.

Final decision-making power in AAIS continues to be held outside of the policy subsystem of educational leadership. Given the changes from historical data in AAIS and future considerations provided by change leaders, it is reasonable to suggest that a collective arrangement between the EDI policy analyst (internal) and myself as a site-based EDI consultant (external) could be successful, providing that the relevance and applicability to the network context are provided.

### **Possible Solution 3: Implement a Radical Transformative Change**

A solution to implement a radical transformative change aligns with Shields's (2018) extension of Freire's (1970/2018) social justice directives. Shields (2010) pushed beyond theory by introducing transformative leadership as a style inclusive of leadership for social justice and more appropriate for culturally and linguistically diverse contexts. Examining a broader social change in AAIS, this aspect of leadership criticizes discriminatory practices and addresses both individual and public good. Shields (2010) addressed equity in education, a facet of EDI that



may be examined in the context of AAIS. This radical transformative solution would include the sweeping determination of the valuation of individuals with differences in society and assume that all cultural considerations will move towards such reformation. Direction for such change within AAIS would be most influential instigated from Alberta's accreditation leaders.

Current policy in Alberta clearly identifies authority and the reference of authorization. Specific phrases such as "to support children [and]... school authorities must ensure" (Alberta Education, 2018a, p. 31) specify the commitment, and as Van Leeuwen (as cited in Trilokekar & El Masri, 2017) suggested, "an impression of consensus" (p. 672). The policy addresses a rationalization linked to social goals of the current societal perspective; this perspective could be suggested as one of national EDI practice. Alberta Education's (2018a) policy specifically states, "regardless of race, religious belief, colour, gender, gender identity, gender expression, physical disability, mental disability, family status or sexual orientation, or any other factor(s)" (p. 31) and suggests a heightened obligation of other provinces to support the policy.

A promise of change (Shields, 2018) of this magnitude includes the consideration that action would be taken and would encompass a critique of the status quo. This solution demands critique of morals, values, and beliefs regarding EDI. It assumes that such a call to action would create deep and equitable change (Shields, 2018). It forces a cultural invasion and a convincing of cultural inferiority (Shields, 2018). Here the struggle for domination exists, as the sociocultural relations of one social structure may be negatively affected by this process. If cultural invasion were applied, it would suggest an oppressor (the invader) and the dominated culture (international schools). This cultural invasion, in and of itself, could be examined as an antithesis of social justice.

An issue with transformative leadership has included generalization when analyzing the leadership style with globalized and cross-cultural perspectives. Instead, this solution would demand a cooperative dialogue between those involved. As Freire (1970/2018) indicated, two cultures would mesh to identify this oppression as a dual problem without sides but rather as a mutual force. If both AAIS sites and program policymakers in Alberta can embrace the radical movement of transformative leadership, they may be able to achieve unity in liberation (Freire, 1970/2018). Careful consideration to AAIS cultures and historical belief systems is required.

Solution 3 describes an authoritative approach to monitoring (Plan) and would present with significant costs. At a systems level, it would be difficult to present a sweeping generalized approach to the complexities of EDI across 14 countries (Do). There are also global relationships involved that may not survive a traditional versus modern approach to the EDI discussion. Additional monitoring would be required with increased evaluative guidelines (Study). Potential loss of AAIS sites may equate not only with financial loss for the governing system but also reputation concerns (Act). Without thoughtful respect, the process of action-based dialogue becomes one of oppression and not mutual cooperative reformation. A theoretical analysis of current risk factors suggests that Solution 3 may be effective at only mitigating political variables and addressing the resource costs (see Table 2).

**Table 2**

*Resource Costs Required and Risk Analysis*

Solution	Human (internal actors)	Fiscal	Information	Senior management (ownership)	Political
1	Achieved	Achieved	Low	Low	Low
2	High	High	High	High	High
3	Achieved	Medium	High	High	High

### **Chosen Solution**

The creation of an AAIS organization EDI policy analyst (Solution 2) is the best solution. The position addresses several aspects of the problem at hand. Providing that the analysts in each AAIS site are consistent in their knowledge and capacities of EDI, the position serves multiple purposes. First, an EDI policy analyst can serve as a liaison between external consultants, such as myself, who lack the agency to effect change at the senior management level. Second, the analyst can provide direction to senior leaders regarding EDI practices, moving towards change from within the agency. Third, the analyst would hold authority for policy and the impacts of policy because of their positionality within AAIS. Benefits to the AAIS organization include global recognition for advancing EDI in their system, tier advancement as increased *TQS* (Alberta Education, 2020) mandates are met, and meso and microsystem advantages of consistency within EDI policy direction. As a collective, the EDI policy analysts have the potential to effect change and model policy as praxis for other international schools.

### **Summary and Evaluation of Possible Solutions**

Three solutions to the PoP have been summarized and analyzed: maintaining the status quo, creating an AAIS internal position for an EDI policy analyst, and implementing radical transformative change. As noted in Table 2, Solution 2 is the most capable of presenting as consistently innocuous yet powerful regarding a social justice foundation of EDI.

The most resource-efficient solution of maintaining the status quo does not align with a firm sense of moral leadership (Shields, 2018) or incite change. Radical transformative solutions may perpetuate a reversed oppression or dominance of Westernized culture. Instead, an internal AAIS position of an EDI policy analyst is a solution that can effect transformation of the instructional core while appreciating the collaborative framework of the agency in its entirety.

This solution encompasses senior management, Boards of Governors, directors, political networks, and socioeconomic influence in the cultural systems. Howlett et al. (2017) supported this framework by recognizing that the key aspect of this solution is institutional learning. My role would continue to reside as an on-site, EDI specialist consultant working with students, staff, and families in conjunction with the EDI policy analyst. Aligning practice with policy, this approach promotes a transformative structural change (Shields, 2018). The subsystems of the framework are then provided the capacity to collaborate in intentional dialogue for equity reform, relying more on consensus than conflict.

Through the application of Cawsey et al.'s (2016) change path model and suitable change drivers acknowledging the cross-cultural dimensions adding complexity to the PoP, this collective arrangement of an EDI policy analyst prompts the agency to purposefully enact continued change. Supported by the concept of the policy network theory (Keast et al., 2015), this solution aligns the internal and external structures with the continued goal of an international coalition for equity reform. The intended outcome is an equitable environment aligned with the *TQS* (Alberta Education, 2020) that results in increased EDI practice for staff and students. A framework can also be developed to guide governance and management as change leaders.

### **Leadership Ethics and Organizational Change**

Liu (2017) queried how ethical leadership is defined and questioned the very concept: If ethical leadership is believed to be intrinsically ethical, the definition necessitates clarity. As a member of multiple professional colleges including the College of Alberta Psychologists, the Psychologists' Association of Alberta, and previously the Alberta Teacher's Association, I am held to standards aligned with a provincial code of ethics. There is a power factor within this system as registration can be removed, a member can be penalized for untoward behaviour, and

the determination of ethical standards is based on a group of individuals' perspectives of the definition of ethical behaviour. The absence of a consistent definition of ethical leadership in education equates to a reliance on the interpretation of the term itself. The status quo of the broad meaning of ethical leadership can be challenged on a global stage with transformative educationally minded revolutionists.

### **Ethics and Cultural Dichotomy**

If society, as Liu (2017) addressed, views leadership in two different modalities that includes a normative standard and the determination of social science to explore perceptions, then the discussion is subjective. The PoP within this OIP addresses the practice of EDI at AAIS sites aligned with a Western curriculum. Ethics informs a debate of hierarchical power, the inequitable distribution of power, and the expansion of social justice within society. It extends beyond the change recipients in a school towards political avenues, existing frameworks, and cultural values. Educational equity is entangled with cultural and political dynamics and resulting change strategies tend towards consensus rather than conflict (Oakes & Rogers, 2006). Intertwined with critical theory, Liu aligned critical leadership studies that offer methods to resist the sacralization of leadership. Challenging moral agency and presenting a relational perspective to ethical leadership are key as they quantify the relational construct required for change.

To challenge the current hierarchical system under which many of the AAIS organizations exist, one can view ethical leadership as relational. Therefore, how the actors engage with one another and the interactions between those actors (Liu, 2017) may provide for the call for ethical leadership development. Fairhurst et al. (2009) addressed that context is not only dynamic, but multilayered, compelling the question of how to rationalize leadership within the context of a dynamic and fluid process such as educational reform.

### **Ethical Leadership and Power**

Liu (2017) identified leadership as a political act. It is nonlinear and nonbinary, with an outcome goal of an emergent ethical leader arising from a relational construct. Power, authority, and legitimacy (Liu, 2017) are factors within the normative approaches of ethics, as the cultural determination of historical practice suggests that ethical leaders are defined by their current system. When systems are forced to interact, such as within this PoP, attempts to consume another into one's own system of ethical knowledge arise (Hancock, 2008; Pullen & Rhodes, 2013), and an ethical-political practice of leadership is realized. Systemically, unequal power structures exist in all forms of leadership and are reproduced (Liu, 2017). This hierarchy continues to dominate in a fundamentally oppressed system of actors who are reliant on leadership yet strive to construct new frameworks to effect change (Oakes & Rogers, 2006).

### **Ethic of Care, Justice, and Critique**

Reframing ethical considerations of AAIS and the Alberta educational system requires cautious consideration of the ethical responsibilities of leaders within the context. Starratt's (2012) multiple ethical paradigm aptly describe three components to the discussion of ethical leadership within the framework of IE: ethic of justice, ethic of care, and ethic of critique. This multidimensional ethical framework includes the consideration that first and foremost, society (and agency) place humans in relationships of absolute value (Starratt, 2012). This ethic of care supports the work of Shields (2018) and the call to exhibit moral courage (p. 146). It is a dimension, as Starratt described, that binds a community together in common humanity and creates a cultural tone.

A consideration within this OIP includes the understanding that although this facet describes humanity at its most vulnerable, it also assumes that ethical leaders can reinforce the

consistency of such care across societal platforms. This assumption may not be true. Ethic of justice is determined regarding how individuals in the network view their behaviour in terms of the common good (Starratt, 2012). This affects care. With this understanding comes two aspects of just behaviour: (a) the individual's choice to act justly and (b) the community choice to govern its actions justly (Starratt, 2012).

This OIP addresses the suggestion of realignment between subsystems. The intended result is a consistent representation of moral and ethical behaviour by school leaders existing in a currently hierarchical climate. If caring is an ethic in the bones of humans (Starratt, 2012), then justice should reside in the organization to reduce unequal power configurations duplicated within leadership. This idea creates a consistency between the ethic of justice and the policy network theory (Keast et al., 2015): As schools can be considered undifferentiated subsystems, the need to examine relevance and applicability to network contexts within a sense of justice creates interrelationships between the elements of policy. Strike et al. (2005) considered ethical dilemmas faced by educational leaders primarily from a justice perspective. The integration of multiple ethical paradigms suggests that care and critique fill breaches in a knowledge base that encompasses an ethical, layered paradigm.

Beauchamp and Childress (2013) suggested that a review is required of the professional ethics in education based on the assumption that ethical responsibility and commitments are grounded in traditional concepts of justice. Organizations aligned with countries outside of their jurisdiction would benefit from a re-creation of ethics, acknowledging different ethical paradigms and viewing ethics in a broader perspective (Shapiro & Stefkovich, 2016).

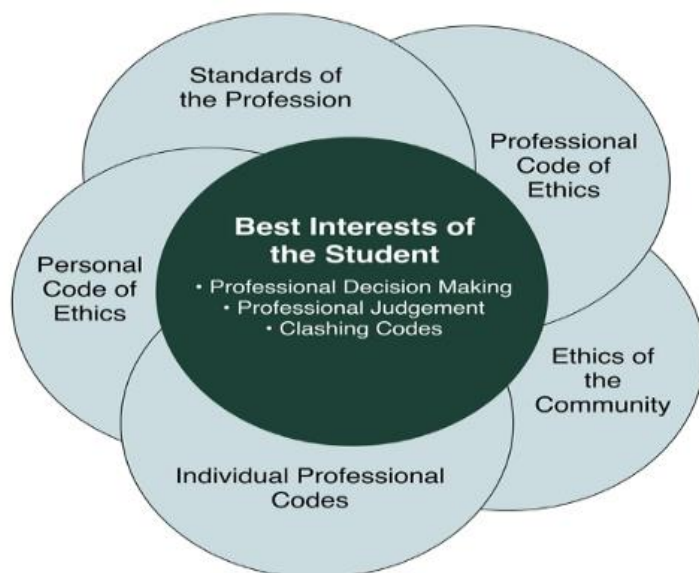
Collaborative dialogue between AAIS and Alberta Education involves addressing community and cultural standards and acknowledging the contract between the parties. The integration of the

EDI policy analyst model within the policy network theory (Keast et al., 2015) demands that educational leaders set high ethical standards for themselves and others.

As Shapiro and Stefkovich (2005) clearly defined, and as outlined in Figure 7, if there is a moral imperative for the profession, it is to serve the “best interests of the student” (p. 38). Alignment between the systems, and critique of current practice driven by an internal position of authority, may best support staff and students in the interest of EDI and ultimately social justice as a change driver for emerging transformative leaders. Based on critical theory, the ethic of critique demands redefining and reframing concepts such as culture, power, and privilege (Shapiro & Stefkovich, 2016).

### Figure 7

*Representation of the Ethic of the Profession*



*Note.* Adapted from *Ethical Leadership and Decision Making in Education* by S. Shapiro and J. Stefkovich, 2005, Front cover. Copyright 2005 by Taylor & Francis.



Supported by Capper (1993) and Freire (1970/2018), the aspect of the ethic of critique provides a multilayered dialogue linked to critical pedagogy. Capper (1993) addressed educational—and therefore moral—leaders to be attentive to democracy, freedom, and equity. This call for awakening provides an approach to solve ethical dilemmas based on humanism, anti-oppression, and equitable practice in education (Shapiro & Stefkovich, 2016). The ethic of critique suggests the implementation of consistency in educational practice.

### **Chapter 2 Conclusion**

Based on social justice epistemology in educational leadership, Chapter 2 has focused on the complexity of paradigms surrounding AAIS organizations. Informed by critical theory (Capper, 2019) and linked to the critical pedagogy supported by the writings of Freire (2000, 1970/2018), a coalition within systems and subsystems can be connected through a revolution of transformative leadership, focused on socially just change (Shields, 2018). This chapter has determined the multilayered facets of proposed solutions leading to the issues of ethical responsibility as defined by Starratt (2012). The preferred solution includes the conceptualizations of leadership to promote a framework of EDI. This solution includes policy as praxis and the implementation of a designated senior management position (EDI policy analyst) empowered by definitive guidelines for practice.

Chapter 3 develops a plan for the implementation, monitoring, and communication of change processes to support AAIS educational leaders to enact change. These changes align with Alberta-mandated requirements of EDI in accordance with traditional customs and social roles. Chapter 3 delves into the process of monitoring and evaluating such reformatory change within a fragile agency and provides context for next steps and future considerations of social change.

### **Chapter 3: Implementation, Evaluation, and Communication**

This OIP addresses the challenge for transformative educational leaders in social justice to adapt existing EDI policies and frameworks within AAIS systems. It is fostered with the model of transformative leadership championed by Freire (1970/2018) and Shields (2010, 2011, 2018), and strengthened by Capper's (2019) critical theory in concurrence with Lewin's (1947a, 1947b) change management model. This chapter includes the process of implementation, evaluation, and communication to effect change for the proposed solution. The monitoring and evaluation framework can define a planning process that provides direction not only to current practice but also to the ongoing change process (Markiewicz & Patrick, 2016).

#### **Change Implementation Plan**

Markiewicz and Patrick (2016) identified a “cascading monitoring and evaluation framework” (p. 10) that allows clear links between the contextual complications of multiple stakeholders. The differences between monitoring and evaluation must be well defined to support the process and initial outcomes in conjunction with the resulting informed program development and future growth learning. Good monitoring requires sustained organizational capacity (Markiewicz & Patrick, 2016) while integrating the complementary aspect of an effective change evaluation process. Consideration of implementation may alter the evaluative and/or monitoring approach. Leaders may find increased compliance as well as sustainability from a strong monitoring and evaluation process that is provided through this scoping process.

#### **Summary of EDI Change Goals**

The framework of AAIS as aligned with Alberta curriculum includes a division-oriented 3-year strategic plan. The consistent goals within AAIS that align with Western influence include that all staff are responsible for all students and that the appropriate supports are provided for

students to reach their potential. Within some AAIS contexts, an amalgamation of positions has occurred to reduce EDI-specific administrative positions. The intent has been to place the responsibility of student needs on staff, guided by administration, forcing staff capacity in EDI. The change plan presented in Chapter 3 includes the following goals: (a) to strengthen the position of AAIS in accreditation guidelines and tier advancement; (b) to build EDI capacity in site-based and senior leadership; and (c) to create and institute EDI policy for AAIS programs.

AAIS sites are required to develop quantitative measures within their strategic plans. This OIP proposes a monitoring and evaluation framework to sustain and continue change in EDI practices. Access to resources varies between locales; for the purpose of this OIP, the two main considerations include expertise and time. Integrating Solution 2, an EDI policy analyst would work with consultants specific to EDI, such as psychologists, behaviourists, and speech and language pathologists. Time would be required as a priority of learning and capacity building within all systems in AAIS.

### **Strategy for Change: Change Path Model**

Cawsey et al.'s (2016) change path model has been chosen as the most effective change model for this OIP because it provides four clear processes in which AAIS can align EDI practice with mandated guidelines. Based on the change readiness questionnaire of a representative site (see Appendix A), AAIS sites are positioned for change. This OIP proposes a systemic change process from the microsystem of site-based staff (paraprofessionals, educators, school counselors, administration), to senior leadership (superintendents), to senior management (Board of Governors, owners, directors).

As defined in Chapter 1, the four processes of the change path model (Cawsey et al., 2016) include awakening, mobilization, acceleration, and institutionalization. The processes are

dynamic. As the processes evolve within each stage of the change path model, a reorientation of other processes will be considered to effectively sustain change. For example, as an AAIS site focuses on the acceleration stage and applies EDI practices, the organization will need to return to mobilization to apply formal processes such as professional development to fill in gaps reported by change leaders. Aspects of measurement and evaluation towards the change goal (institutionalization) would be simultaneously applied to confirm that the EDI framework is understood and effectively communicated by change leaders. It is within this fluid structure that evolution demands transformative leaders who move past curriculum to transform mindset, structures, and policies (Shields & Hesbol, 2019).

### *Awakening*

This first step of the change path model includes the determination of site-specific needs within a given AAIS organization (Cawsey et al., 2016). Leadership is key. Strategic implementation of future steps relies heavily on the consideration that the leaders are invested from a transformative perspective (Shields, 2018) and recognizes that the organization itself is embedded in a wider society. Each AAIS site can be viewed as embedded in two societies: the geographic location (traditional) and the Westernized society of the Alberta-aligned curriculum (modernist). Within this stage, educational leaders recognize that they need to deconstruct and reconstruct (Shields, 2018), or as Lewin (1947a, 1947b) identified, unfreeze, change, and refreeze, to effect change in EDI practice.

My agency would provide the platform to work with site-based staff to review the guiding questions and gap analysis as determined in Chapter 1. As an EDI specialist consultant, I would be included in the collaboration with multidisciplinary teams to analyze the organization

at the site-based level and plan to implement a vision for change. This aligns with incremental and strategic change (Nadler & Tushman, 1990) as the process is continuous.

To determine the vision for change, the meso and macrosystem change leaders present with considerable influence. Aligned with Solution 2, the EDI policy analyst would lead a hierarchical approach to policy creation and implementation. Alongside my agency as well as other specialist consultants, the EDI policy analyst would integrate the senior management and leadership stakeholders with the site-based staff, collaborating on current EDI policy frameworks and investigating gaps.

As identified in Chapters 1 and 2, EDI is defined as a tenet of the *TQS* (Alberta Education, 2020) and determined as a key guideline in the accreditation of aligned school systems. This requirement may create an even more challenging climate as the moral determination of the decision has already been made. It may force stakeholders into a more defensive position. Readiness should be considered as a spectrum of focus, from those who are compliant with the direction to those who are motivated and transformative in their positions.

Cawsey et al. (2016) identified that if the current culture, including management, is open to the change initiative, then the organization is likely to be receptive to the change. The morality of the discussion and the likelihood of differences in moral development should be considered. In this context, the decision to implement EDI is defined and mandated as a key practice. The cascading effects of stakeholders towards sustainable change processes requires the support of existing frameworks regarding inclusive practice (Cawsey et al., 2016). The readiness to choose future direction may be more limiting.

To augment the force field analysis in Appendix B, an overview of stakeholder understanding and commitment (see Appendix D) was completed. It includes the stakeholders'

readiness to act (Cawsey et al., 2016), which ranges from supportive to resistant within a typical AAIS site. Consideration to the initial category—early adopters—within the educational organization is important to determine those who, as Cawsey et al. (2016) described, seek variety and change. Administrators and educators already familiar with and motivated towards EDI practices will likely continue to imbed EDI within their agency. As innovators, these individuals seek to change within a culture of preexisting definitions and assumptions of students with differences. Depending on their position within the organization, some have made progress. This process is noted in their 3-year plans as well as in changing practices overall in staff hiring, curriculum development, and revolutionary dialogue with stakeholders.

The early majority (Cawsey et al., 2016) exists within the educational framework; they are receptive to change, yet they are not first adopters. In the stakeholder understanding and commitment table (see Appendix D), these change agents and recipients could be considered those who are ensconced within a local AAIS site yet are not in positions of direct leadership to effect change. These individuals may have differing educational philosophies on EDI practices or be influenced by cultural considerations that present as moral decision-making.

The late majority and late adopters (Cawsey et al., 2016), in the context of global education and cultural belief systems, may be identified as those who are firmly rooted in the AAIS location's historical belief system regarding EDI. These actors may also present as late majority or late adopters because of the possibility of backlash or instability of their positions. Driven more by economic and political factors than moral reasoning, hesitancy for these individuals may associate motivation and willingness to change with a clash of their cultural belief system. Closely related, the nonadopters (Cawsey et al., 2016) refuse to adapt or change their practice. A challenge within the awakening stage includes that nonadopters in AAIS sites

are often more rooted in senior level management, key stakeholder positions, and private ownership. As proposed in Chapter 2, an EDI policy analyst positioned within each AAIS site would provide access to informed practice to stakeholders who struggle with the opposing viewpoints of EDI when compared with their current frame of reference.

### ***Mobilization***

This second step of the change path model includes the communication of current and future strategic plans (Cawsey et al., 2016). These considerations to the analysis of the present state solidify the gap analysis noted in Chapter 2. This vision of educational and societal transformation (Shields, 2018) creates strength and moral fortitude to forge ahead with a difficult—and sometimes strongly opposed—process of change. Complications within this framework include differing political and contextual considerations. Linked closely with Lewin's (1947a, 1947b) stages of change, this scoping process defines key steps. They include outlining requirements, determining participation arrangements, identifying possible and preferred approaches, reviewing resource parameters, and confirming purpose and parameters of the framework (Markiewicz & Patrick, 2016).

The mobilization stage includes assessing the informal organizations of power and culture. Change leaders are affected by their personal experiences and bias. Given that the unique needs of a particular population of students and EDI are products of social justice, one can assume that there are determinants of ethical decision-making and targeted behaviours that support or deny associated belief systems. The organizational culture and policies are influenced by change recipients who are participating and motivated towards the outcomes (Jones, 1991).

A component of moral intensity and one most applicable to the current situations of AAIS is a sense of urgency. Whereas the concept of moral reasoning can be considered issue

dependent (Jones, 1991), the reality of the change process surrounding EDI practices is mandated. This reality calls for moral reasoning or judgement and forces educational leaders to address their own moral cognitive processes.

In terms of stakeholder influence, Jones (1991) highlighted the key determination that not all leaders are at the same stages of moral development. Higgins et al. (1984) provided context to the concept of differing moral development, suggesting that individuals tend to use less developed capacities of moral reasoning when thinking about real-life dilemmas. Based on the social psychology of morality and reasoning, transformative leaders are faced with challenging tasks of revolutionary dialogue that surround a moral decision and the consideration that moral development may be context or issue dependent (Jones, 1991).

Working with the EDI policy analyst (change initiator/implementer), my agency can provide the narrative framework conceptualized with senior management to assist in connecting moral and ethical beliefs, highlighting outcomes of best practice in EDI. If management's initial understanding is not engaged, they may fail to grasp the new concepts that are taught or may learn them only superficially and revert to their preconceptions in real situations.

To develop competence in an area of inquiry, stakeholders must (a) have a deep foundation of factual knowledge, (b) understand facts and ideas in the context of a conceptual framework, and (c) organize knowledge in ways that facilitate retrieval and application (Bransford et al., 2001). A metacognitive approach to instruction can aid senior management to take control of their own learning by defining EDI goals (what needs to change) and then monitoring their progress toward achieving them.



### ***Acceleration***

Acceleration includes action planning and implementation of change (Cawsey et al., 2016). This process assumes participatory agreement from the stakeholders involved. Internal representation of change agents and leaders suggest that the direction of EDI as noted in the *TQS* (Alberta Education, 2020) is pedagogically sound and morally just. In this stage, leaders and change recipients, including internally based staff, must consider their preconceptions of EDI, training, and professional capacities. Much like Lewin's (1947a, 1947b) dynamic framework, this stage is fluid and constantly in motion. Leaders will be required to adapt to changes within the stage and consider external supports and barriers to progress.

A PLC facilitated by stakeholders from various levels creates opportunities for dialogue (L. Graham & Ferriter, 2010). In my agency, participation within the PLC can assist change leaders and agents to commit to a common purpose, mitigate challenges presented by the organization, and foster continued growth in EDI practice. Whereas data and measurement are important tools, stories and personal reminiscences shared within the PLC can restore faith and promote engagement (Block, 2003; L. Graham & Ferriter, 2010). Operational and concrete expectations created from the vision of EDI for the PLC include (a) a commitment to students in the form of strong EDI practices across each AAIS site, (b) a collaborative framework to build capacity in all staff, and (c) evidence-based results leading to sustainability in EDI practice. This vision would be realized at this stage by the creation of a PLC at each AAIS site.

Expert power (Cawsey et al., 2016) is a key change driver for the PLC and serves to inform its members. The PLC provides the stage for representation from all levels of change leaders, agents, and initiators as well as recipients. A proxy from each subsystem would provide input to the PLC regarding EDI capacity, current direction, and challenges within their system.

The learning opportunities provided by knowledge held within the PLC furthers the acceleration process by accessing resources currently within an AAIS site, augmented by external experts such as myself. The PLC would require resources of time, technology, and the capacity to influence AAIS subsystems by modelling and presenting new information. They would address larger stakeholder groups, including parents and community, on areas specific to EDI and the changes occurring within AAIS to garner support and commitment.

Schein and Schein's (2017) emphasis on the cognitive restructuring of an existing organization includes the adaptability of the change process to allow change agents and recipients to respond to change. The movement towards the final stage of institutionalization is not the result. It is simply an extension of the process for change to continue to evolve (Rajan & Ganesan, 2017). Although support for the change agent's dissemination of new practice continues to exist throughout the model, one could apply the theoretical stage to current practices within this OIP. If this movement towards equitable and just education in aligned schools were to be grounded in the traditional society rather than the modernist society, the theoretical commitment, application, and sustainability of EDI may be applied with less resistance (Oplatka & Arar, 2015). My role would evolve to include collaboration (external) with the newly designed role of EDI policy analyst (internal). This would serve to connect the development of measurement systems with strategies for measurement (Cawsey et al., 2016).

### ***Institutionalization***

Institutionalization includes measurement and monitoring of the change process (Cawsey et al., 2016). Recognizing the mutuality of pedagogical relationships (Shields, 2018) and the internal workings of aligned school systems has resulted in an interconnectedness of community participation. This phase allows for a fluid lens of responsibility and practice to address EDI

within present society. It should not denigrate the AAIS culture, but instead serve to promote change on both sides of the pedagogical table. Achieving the goal of EDI practices consistent across AAIS would necessitate that the measurement process is sensitive to the present state while considering future outcomes of change. As Shields (2018) indicated, this consideration should include balancing critique with promise.

The monitoring and evaluation plans (Cawsey et al., 2016) serve to define questions, indicators, and responsibilities within the change process (see Appendix F). A 3-year work plan, informed by Cawsey et al.'s (2016) Work Plan for Implementation of the Monitoring and Evaluation Framework, can be applied as an initiative to align with the current 3-year strategic plan at each AAIS site. Timelines are illustrative only and are dependent on the size and scale of each program (Markiewicz & Patrick, 2016), yet the existence of a strategic plan across AAIS allows for a predetermined course of action determined by the PLC and change leaders.

Challenges with implementation and monitoring of EDI practice in AAIS organizations include the equitable access to resources across all locations, stakeholder readiness, and sustained participation. Another consideration that this OIP must ethically address is the inequity of a sweeping, generalized, hegemonic project to approach equitable education. Waitoller and Kozleski (2013) suggested that EDI is a continuous struggle towards redistributing quality educational opportunities, valuing differences, and providing opportunities for marginalized groups to represent themselves within education. Culture-inherent assumptions that may present as hegemony or as barriers for those within cultures outside of the Alberta context affect the ability to present a new narrative.

This Western context, applied to a different cultural context, suggests a reaction to marginalization (Kozleski & Siuty Baustien, 2016). Teachers are profoundly affected by the

standards of practice within the educational framework of their work. Ladson-Billings (2006) proposed that the historical legacy of teacher education is one that perpetuates a White, middle-class status quo. Furthermore, it can be suggested that universal strategies, guidelines, and policies have failed to address ingrained social and cultural inequities. The change process as proposed must be supported by monitoring and evaluation and influenced by all levels of stakeholders, providing sustainability and credibility within AAIS organizations.

### **Change Process Monitoring and Evaluation**

In this section, the monitoring and evaluation plan for the change process is outlined. A return to the education-based PDSA model (Deming, 1982) is demonstrated with a description of the business-related DICE (duration, integrity, commitment, effort) model (Sirkin et al., 2005). Predicting outcomes prior to the application of the change process is a proposed measurement solution and serves to inform AAIS stakeholders of the potential benefits (Cawsey et al., 2016; Sirkin et al., 2005).

### **The DICE Model in Comparison to the Plan-Do-Study-Act Model**

Change management has focused on so-called “soft” issues, including leadership, motivation, and culture (Sirkin et al., 2005). Although these considerations are important facets of transformative leadership directing EDI, Sirkin et al. (2005) argued that these soft factors may not directly influence outcomes. Instead, hard factors are identified as common elements of successful change. They include project duration, performance integrity, commitment, and additional efforts by staff to implement the change.

Markiewicz and Patrick (2016) advised bridging the gap between monitoring and evaluation by merging different approaches to find accommodation. The mixed-methods approach to design such monitoring and evaluation is a prominent and accepted practice

(Mertens & Wilson, 2012). Transformative methods, including transformative monitoring and evaluation, can engage context. This engagement of mixed methodology allows for transformation aimed at changing the social condition. “Methods are adjusted to accommodate cultural complexity, especially as related to discrimination and oppression” (Mertens et al., 2009, p. 49). These methods can mitigate factors of cultural diversity between AAIS sites.

The difference between process-oriented and impact theories affects monitoring and evaluation (Donaldson & Claremont, 2007). The process-oriented theory models patterns in decisions or actions over time and addresses mechanisms and paths that shape and govern strategies (Maritan, 2016). Donaldson and Claremont (2007) expanded the concept to include impact-theory as an assumption about the causal relationship between strategy and its expected effect.

Using a logic modelling process, clear identification of evaluation questions (Donaldson & Claremont, 2007) provides a theoretical framework that includes the change process and identification of possible outcomes. The monitoring and evaluation models may be more reliable if they demonstrate flexibility and adaptability to context. Thus, evaluation questions include the following:

1. What is the most significant change for stakeholders?
2. To what extent have stakeholders increased their knowledge and practice of EDI in education?
3. Has the change initiative included stakeholders in the community and political sectors in addition to education?
4. Is there evidence that the three-year strategic plan addresses continued movement towards EDI?

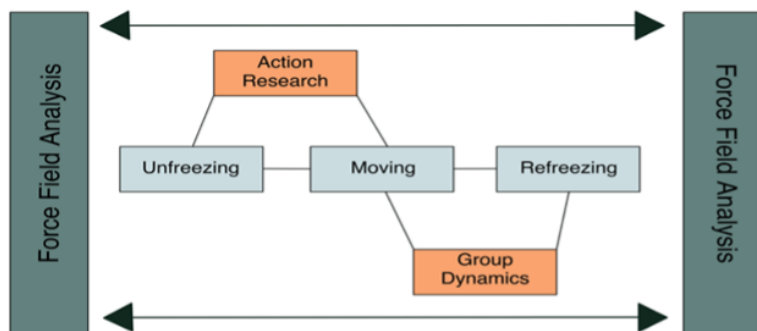
Applying the work of Mertens et al. (2009), Donaldson and Claremont (2007), and Markiewicz and Patrick (2016) moves the discussion through evaluation and monitoring at AAIS. I blended these models to take into consideration the challenges between traditional and modernist societal influences. Appendix F outlines a theoretical monitoring and evaluation plan that accounts for variables that may not be present in public, Western school systems, including differences in stakeholders and the influence of external factors. The monitoring and evaluation plan for EDI programming in AAIS informs the evaluation questions, as well as implementation and the roles and responsibilities of stakeholders.

In Chapter 2, Lewin's (1947a, 1947b) three-stage change model was applied as a process for those in hierarchical positions (administrators, superintendents, and owners) to explore readiness for change within their AAIS structure and the system. Schools that are attempting implementation of EDI are rooted either in an unfreezing or refreezing state and identify increased "hard factors" (Sirkin et al., 2005, p. 109) to focus on change processes and the ability to measure sustainable outcomes. In addition, those outcomes are rooted within a continuous change process (Rosenbaum et al., 2018). As the organization can be viewed as top-down, Rosenbaum et al. (2018) argued that the contributions of Lewin's (1951) action-based work rely on a set of permanent, measurable changes.

Cawsey et al.'s (2016) force field analysis (introduced in Chapter 2), resistance, and the role of group decision-making is not linear but fluid. Described as a more accurate depiction of Lewin's (1947a) model, Figure 8 represents this fundamental methodology, integrating Lewin's three stages of change with the applicable dynamics to identify measurable outcomes in monitoring as well as evaluation.

**Figure 8**

*A More Accurate Depiction of Lewin's Change Model*



*Note.* Adapted from “Planned Organisational Change Management: Forward to the Past? An Exploratory Literature Review,” by D. Rosenbaum, E. More, and P. Steane, 2018, *Journal of Organizational Change Management*, 31(2), p. 289 (<https://doi.org/10.1108/JOCM-06-2015-0089>). Copyright 2018 by Emerald.

Influenced by the work of Sirkin et al. (2005), the DICE model—duration, integrity, commitment, effort—serves as a substitute for the PDSA model for monitoring and evaluation (Deming, 1950; Suporitz & D’Auria, 2020). Whereas Deming’s (1950) original model of PDSA offers an iterative examination of real-world interventions, the DICE clearly bridges the divide between the business model and education model of organizational change.

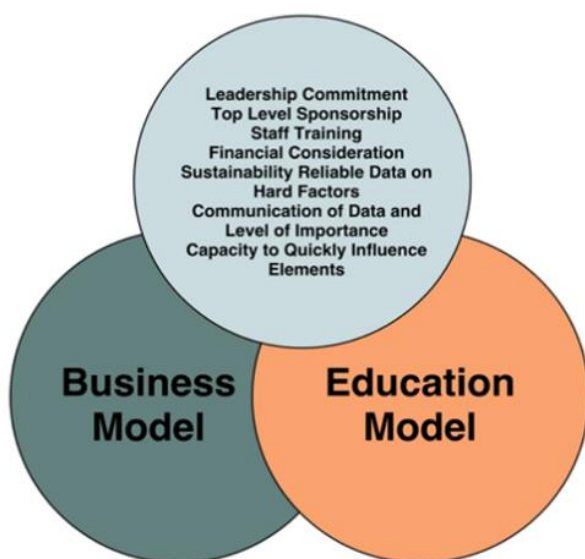
### **The DICE Model**

Application of the DICE framework (Sirkin et al., 2005) can provide educational leaders clear direction to monitor effective change, information to process and support change initiatives, and influence to shape the creation of the evaluative framework. In addition, for the business model of AAIS, the DICE framework can provide information to support clear directives, reasonable initiatives for financial considerations, and identifiable successes. Successes include

the key factors of goals, a motivated and cohesive team, goals championed by top management, and implementation by a skilled department of committed individuals (Sirkin et al., 2005). As noted in Figure 9, the business–education model alliance could encourage further commitment to social justice: The business model’s progressive reputation aligns with the education model’s appeal to integrity and equity and creates a middle ground between the two influences on EDI.

**Figure 9**

*Business–Education Model*



*Note.* Adapted from “The Hard Side of Change Management,” by H. L. Sirkin, P. Keenan, and A. Jackson, 2005, *Harvard Business Review*, 83(10), pp. 108–118. Copyright 2005 by Harvard Business Publishing.

The DICE model (Sirkin et al., 2005) serves to effectively link a similar process of the PDSA (Deming, 1950; Suporitz & D’Auria, 2020) while acknowledging the complex variables in systems of education. It further serves as a model that has been historically applicable, connecting with Lewin’s (1947a, 1947b) three-step change management model. It may also be



considered within the work of Jones's (1991) issue-contingent model regarding an increased societal focus on ethics in organizations. The unique complexity of this OIP remains that although EDI practice continues to strengthen from a global theoretical perspective, AAIS sites continue to exist in a business model that favours competing factors, including enrolment, profit, financial feasibility, and hierarchical management. More developed countries are embracing results-based management initiatives to equate to a results-based culture (Kusek & Rist, 2004).

Monitoring and evaluation can provide information useful at both internal and external levels. It can inform stakeholders who expect results, want to see demonstrable impacts from action, and seek to build trust within the hierarchical system that, indeed, the educational community is providing EDI practices (Kusek & Rist, 2004). Lewin's (1947a, 1947b) three-step change model has evolved in various industries, including businesses. The past view of change has been in terms of size and impact, whereas the evolution of monitoring has included the mutual exclusivity between characteristics (Rosenbaum et al., 2018). Within these characteristics, the parts become the whole. This impacts the cascade effect (Cawsey et al., 2016) of social consensus, the desirability of the intended outcome, and the perceived volition (Jones, 1991).

The DICE model (Sirkin et al., 2005) highlights the potential of alliance between AAIS sites. The model also serves as a hard factor indicator with clear calculated outcomes that can be measured and remeasured as change perpetuates within AAIS sites. It can clearly measure success and aid in the communication of efforts as well as emphasize specific target areas reported as variables:  $DICE\ score = D + (2 \times I) + (2 \times C1) + C2 + E$ . To clarify, C1 indicates influential executives in the organization and C2 presents as a variable addressing the people who must navigate the new systems. The calculator addresses each of the four components,

integrating key questions including change initiative reviews, change leader expertise, stakeholder feedback, and staff workload. Referring to the calculation of DICE factor scores presented in Appendix G, a lower score is suggestive of a healthy system.

### ***Duration***

The first of the four key factors of the DICE model (Sirkin et al., 2005), when applied to the monitoring and evaluation of change initiatives, is duration. As a key element to systemic change, duration includes the scheduling and regular reviews of milestones such as concise reporting, progress of the initiative, and the length of time that the change requires for implementation (Sirkin et al., 2005). The context of educational change initiatives translates to include communication from the key stakeholders, including the EDI policy analyst, an external consultant such as myself, and the administrative team. This could lend an alliance between stakeholders whereby differences in moral valuation and perspective of equitable education contrast with business-related vision. Scores calculated for the duration factor can determine if change initiatives will result in success.

Sirkin et al. (2005) clarified that the resulting analysis of the calculation puts the initiative into one of three categories: win, a statical measurement of success for the initiative; worry, a warning that the initiative requires careful monitoring and consideration; and woe, whereby the initiative is unpredictable or will fail. Identifying the change management initiatives would be a formidable task. The theoretical underpinnings of social justice meshed with the practical implications for facilitation at the site-based level add to the complexity. The duration factor can include not only time elements for changes in EDI but also considerations to the 3-year strategic plan. Analysis of soft-core factors tend to be subjective. Specific areas of improvement within the 3-year trajectory and regular, formalized review would provide firm data to report to

stakeholders and prompt responses (Sirkin et al., 2005). Within this calculation, change leaders can provide consistent data monitoring that will affect sustainability, continued motivation, and empirical examinations related to ethical decision-making (Jones, 1991).

### ***Integrity***

The next of the four key factors in the DICE model (Sirkin et al., 2005) is integrity, a component that addresses the hard and soft factors needed to manage change and the change process. Teams need to be cohesive and well led. Supported by business and education models, the integration of this aspect in the DICE model demands accountability from all stakeholders.

The people leading and implementing the change initiative are crucial to its outcomes, encompassing their skills, experience, and motivation (Tahir, 2020). Although the integrity factor could be seen as subjective or soft, the DICE model provides a statistical analysis of human contribution (Sirkin et al., 2005). The team members devoted to the project are integral to the analysis. The team should include senior management, the EDI policy analyst, an external consultant, and qualified educators focused on alignment with the *TQS* (Alberta Education, 2020) and committed to direct the school system towards equitable education. This factor can highlight deficits in conflict resolution, the composition of the team, and the ability of the managers to solve problems. It is highly influential in that the tiers of stakeholders within AAIS may present with varied capacities in these softer areas and warrant careful consideration.

### ***Commitment***

Change agents in positions of influence may not be those with top titles (Sirkin et al., 2005). The commitment factor within the DICE model suggests the importance of visible patronage from those in positions of authority in addition to those who must manage the change. Particularly within Lewin's (1947a, 1947b) three-step change model, a constant state of

refreezing suggests that site-based administration and staff are perhaps the most affected by the continuous progression of the change process. The ability to build staff support is assumed within the contextual framework and requires repositioning within AAIS. Consistent with the first factor of duration, commitment to change requires regular check-ins with staff to provide professional development opportunities, focused conversations on objectives and impact, and engagement to increase impetus towards change. The DICE score on this factor may be affected by stakeholder differences in commitment, compliance, and resistance towards the change initiative. In theory, this variable will also be affected by geographical locations.

### ***Effort***

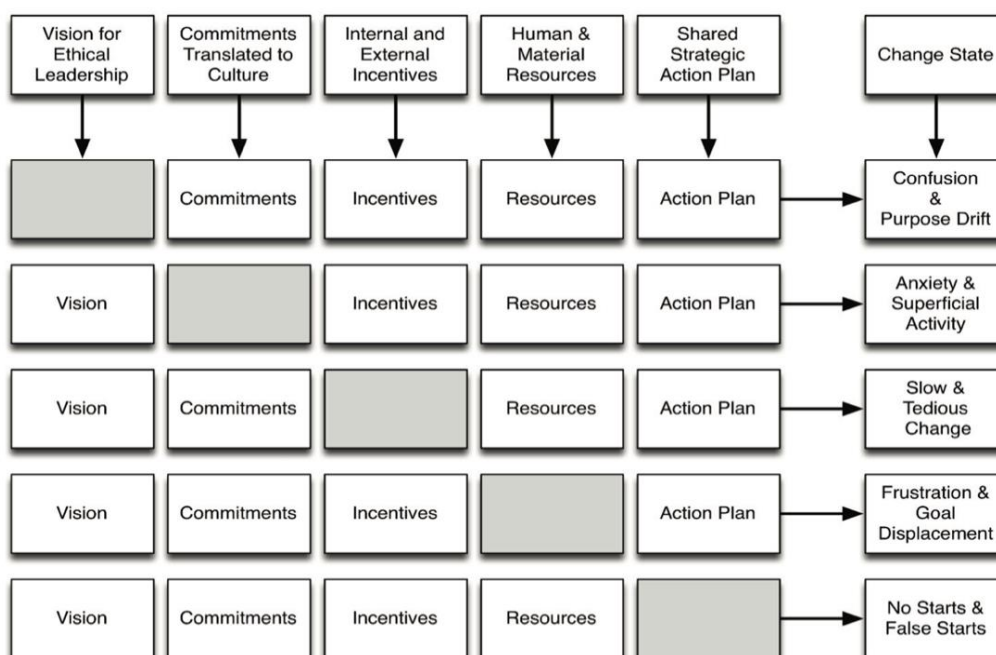
The final factor of the DICE model is effort (Sirkin et al., 2005). A danger is for organizational management to disregard the current workload of staff. As the calculation of DICE scores suggests, the workload should not exceed an increase of 10% to receive an optimal score (see Appendix G). Workload discrepancies between classroom-based educators and administration is thus an important factor to consider. Concerns regarding consistency across internationally based schools exist; in determining a needs-based approach, some AAIS sites demonstrate strong EDI practices whereas others require substantial considerations to change.

Educators may be reluctant to add to their workload if the project is time-consuming or out of their scope of practice. Thus, a strong commitment to training and mentoring from external specialists, collaborating with the EDI policy analyst, could enable a better score on this section. In addition, this factor may involve financial considerations if staff are released of duties deemed nonessential. The change leaders must weigh the financial considerations with the possible consequence of delays and possible stagnation of the change initiative.

Walker (2011) addressed the moral agency of educational leaders and identified both the emissary and the climate of ethical leadership to sustain the school culture. Multiple variables affect the resulting change state, and distractions from the collective goal threaten the ability of transformative change in school culture. Understanding ethical decision-making in organizations is important to contextualize the effect of culture on the change process (see Figure 10).

**Figure 10**

*Elements Associating with Achieving and Sustaining Ethical Cultures*



*Note.* Adapted from “Ethical Leadership for Sustainable Development in Africa” by K. Walker. (2011, July). Background paper prepared for the 8th Annual Forum of Heads of Public Service in Africa, Commonwealth Secretariat, Namibia, Africa.

The DICE model (Sirkin et al., 2005) clearly delineates both a monitoring and an evaluation system that can be applied to what could be deemed a moral issue—EDI practice. As Fiske and Taylor (1984) suggested, the theoretical foundation of the issue-contingent model is a

complex set of theories and relationships under social cognition. These aspects may not be clearly understood by the involved stakeholders. Decisions based within social cognition provide links between stages or moral intensity and reasoning, aligning with the issue-contingent model (Jones, 1991). This PoP is a complexity of intertwined context-dependent decisions to adopt a strategically aligned mandate. The subjectivity of moral reasoning and determining moral intensity is not the hard factor business representation in which to report the change process.

Communication of the monitoring and evaluation outcomes will be key for accountability and sustainability. Communication involves the determination of the process to provide stakeholders with the capacity to analyze and synthesize data (Markiewicz & Patrick, 2016) so that they can reach conclusions that are consistent and sustainable at a given AAIS site.

#### **Plan to Communicate the Need for Change and the Change Process**

From a business perspective, enrolment factors and commitment from external stakeholders are keys to financial gain. From an educational perspective, institutional commitment from senior level management, including owners, directors, and superintendency, are fundamental factors for progress. Proximal goals involving integration among all change agents and recipients are fundamental to form consistency and demonstrate respect for culture, history, and religion in addition to the moral valuation of inclusivity. Armenakis and Harris (2002) aligned this consolidation with the communication necessary for change, integrating the importance of conveyance to support such change.

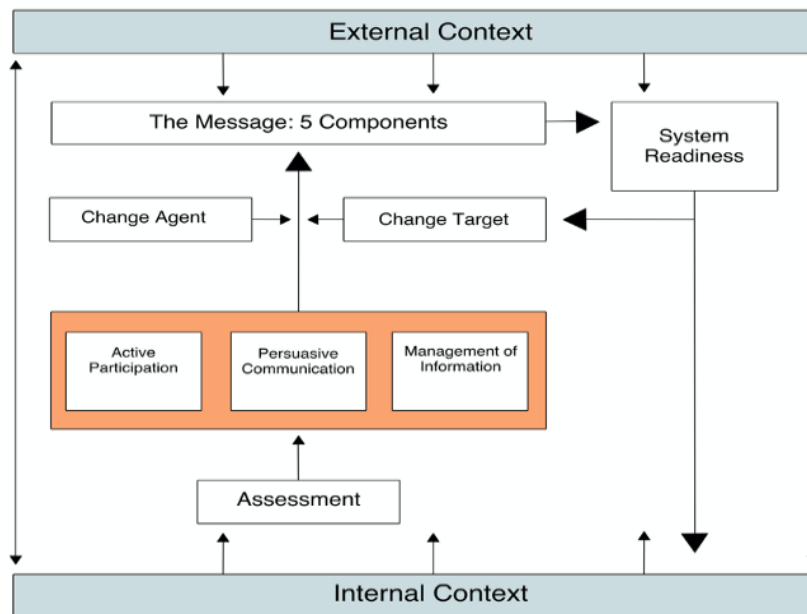
This manner of communication suggests that it must be multifaceted and strongly aligned with those involved. This approach, linked to transformative leadership, critical theory, and social justice revolutionaries Freire (1970/2018) and Shields (2018), looks to convey the message, support improvement efforts, monitor staff reaction to change, and maintain change.

## Readiness Model

Linked to Lewin's (1947a, 1947b) three-stage model, Armenakis and Harris (2002) provided a three-stage communication guideline: the preparation for change, the adoption of change, and institutionalization to maintain change. They further identified five key domains conducive to effective and sustainable change that can be linked to the query of EDI practices in AAIS: discrepancy, efficacy, appropriateness, principle support, and personal valence (Armenakis & Harris, 2002; Armenakis et al., 2007). These five areas are explained further below. As noted in the readiness model (see Figure 11), communication of the change message is one aspect, but it is not the sole influence.

**Figure 11**

*Readiness Model*



*Note.* Adapted from “Crafting a Change Message to Create Transformational Readiness,” by A. A. Armenakis and S. G. Harris, 2002, *Journal of Organizational Change Management*, 15(2), p. 171. Copyright 2002 by Emerald Publishing.

### ***Discrepancy***

The discrepancy domain asks the question, “Is change necessary?” This domain addresses current performance compared to the desired end state (Armenakis & Harris, 2002). The theoretical perspective of EDI does not have a beginning and an end but rather is a continuous process, as supported by Lewin’s (1947a, 1947b) refreezing state. Also aligned with the issue-contingent model, Jones (1991) identified social justice and the intertwined moral valuation with the practicality of application and improvements because of positive change. Jones (1991) further acknowledged the difficulty with using empirical information for ethical decision-making in organizations that may affect the intermingling of ethics and organizational behaviour. The message from change agents must include clear communication that is persuasive, active, and inclusive of both internal and external factors (Armenakis & Harris, 2002). This communication may alleviate concerns about incongruity and promote consistency between internal and external stakeholders led by a cohesive management team. Integration of the current commitment profile and the stakeholder readiness assessment (Cawsey et al., 2016) previously noted may further support the persuasion necessary to address discrepancy.

### ***Efficacy***

Efficacy can be considered as the theory of motivation (Armenakis & Harris, 2002). Change recipients may attempt change only if they have confidence of a successful outcome. It is pertinent to examine the psychological context of this domain. Social cognition theory (Bandura, 1989) suggests that the reactions of others and interactions with others profoundly shape one’s perceptions. It suggests a model of causation reflected in a reciprocal triad in which behaviour cognition and environmental influence operate as influential determinants towards an outcome



(Bandura, 1989). Applied to the process of communicating the efficacy of change, educational actors in AAIS present with different social responses depending on their role and status.

The efficacy domain, when understood through the psychological process of social cognition, is aligned with the conceptual framework of persuasion. Efficacy is how the change recipients and agents consider themselves in the framework. The historical work of Raush (1965) has been noted to solidify the concept that through individual action, people not only create but select their environments. It could be determined, in this context, that the current system of educational leadership is called to transform social justice in education. Calls abound for leaders to practice such leadership, transcending the intellectual bias in schools to benefit all (Capper, 1989). Shields and Hesbol (2019) submitted that one must know oneself, the organization, and the community. This confidence in leadership, in the message of change, and in the success of change itself begins with the understanding of one's role and responsibility within the agency.

### ***Appropriateness***

The appropriateness domain as a theoretical determinant of change queries the necessity of such change (Armenakis & Harris, 2002). Alberta Education (2020) defined this necessity within the *TQS*, identifying that “a teacher establishes, promotes, and sustains inclusive learning environments where diversity is embraced and every student is welcomed, cared for, respected, and safe” (p. 6). This competency aligns with the Canadian Charter of Rights and Freedoms (Constitution Act, 1982) as well as the Alberta Human Rights Act (2000), yet these legislated guidelines may vary between participating countries in the educational alignment.

The theoretical determination of a competency within the parent province system does not necessarily functionally align with the receiving system, and this discrepancy can create praxis within the communicated change message. Sharing the level of appropriateness for the

change, considering this position of managing both internal and external factors (Armenakis & Harris, 2002), will be instrumental for not only acceptance but true commitment and motivation to change.

### ***Principle Support***

The concept of an integrated business and education model in the context of this OIP presents opportunities and barriers. From a business perspective, AAIS senior management may be reluctant to engage in transformative leadership and change from a financial standpoint. Armenakis and Harris (2002) suggested that principle support is key. This domain addresses the organization's commitment of resources to the change and the cascading factors of supportive stakeholders when it provides such support. Based on the current commitment profile (Cawsey et al., 2016), reasons for change resistance include a lack of training or information on EDI, preconceptions, misconceptions regarding the practice of EDI in education, or a vision that is monetary rather than focused on revolutionary social justice (Shields, 2011).

The preferred solution as determined in Chapter 2 incorporates an integrated relationship between the organizational leaders and an internal EDI policy analyst whose role may include identifying the factors supporting change and leading stakeholders to a better understanding of the implications. Armenakis and Harris's (2002) strategies also include active participation and persuasive communication, two key approaches to building a strong, motivated partnership between AAIS senior management and stakeholders.

### ***Personal Valence***

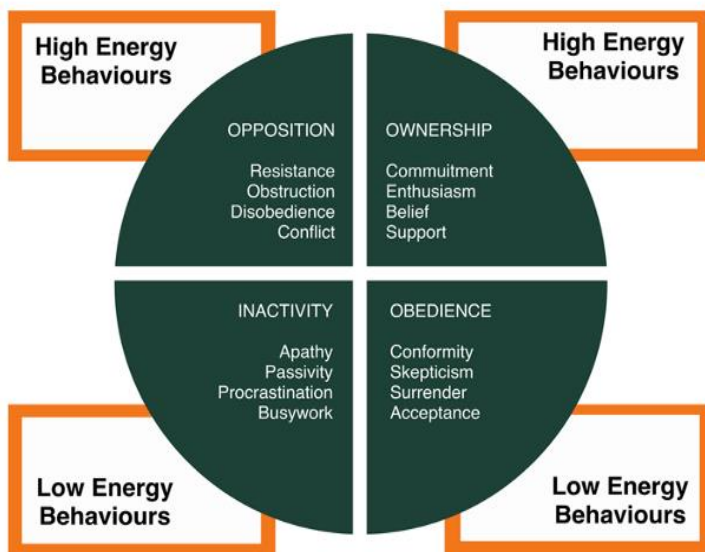
Finally, Armenakis and Harris (2002) addressed a key question of the human condition: "What is in it for me?" (p. 178). Assigning value to morality is subjective. As Freire (1970/2018) argued, society can develop a "being for itself" perception (p. 161). The education system is

authenticated by the results of an inclusivity revolution. The egocentric concern is based on the reality of the condition, and the change leaders must then create an aspect of solidarity requiring true communication (Freire, 1970/2018).

Intrinsic valence and pride connected with the extrinsic valence of results communicated to the stakeholders results in value-added potential for change targets (Armenakis & Harris, 2009). Armenakis and Harris (2009) defined this concept of salience within the change message as an articulated vision, a demonstrated shared leadership in support of the vision, and the perceived appropriateness of the vision. This transition from the extrinsic to the intrinsic promotes the revolutionary message of a compliant acceptance of equitable education. It also functions as a promotional force within AAIS even if resistance is a motivational driver.

### **Behavioural Reactions to Change Model**

The change leaders' interpretation of stakeholders resistant to change can result in the conclusion that participants either understand or misunderstand the situation (Koller et al., 2013). Obedience can be a destructive factor (Koller et al., 2013) if it lacks commitment to the outcome of change. Connected to the work of Lewin (1947a, 1947b), the deeper psychological connection of resistance links it as a force driving towards equilibrium. An external observer could view staff resistance to EDI as adverse; a change leader could redefine this perspective as a lack of passivity moving towards a higher-level cognitive process of commitment and ownership (Koller et al., 2013). As Figure 12 indicates, obedience can be linked to a low-energy behaviour, including passivity and conformity. Moving change agents towards high-energy behaviours suggests opposition, yet this approach moves the individual forward towards belief and support, resulting in a connected outcome of effective change.

**Figure 12***Behavioural Reactions to Change Model*

*Note.* Adapted from “Is Obedience, Not Resistance, the Real Organizational Change Killer?” by R. Koller, R. Fenwick, and R. Fenwick, Jr., 2013, *Change Management: An International Journal*, 13, p. 6. Copyright 2013 by Common Ground Publishing.

Implications for understanding the connection between communicating the need for change in conjunction with change recipients owning, rather than obeying, the change process, are twofold. First, the change leaders must understand that they stimulate ownership or obedience when they lead change whether or not they are cognizant. Second, the reduction of morality and EDI as a value-based judgement and the integration of a scientific, data-based outcome may invite those compliant or resistant to move towards a higher energy organizational change perspective (Koller et al., 2013). The very dynamic of communicating the change message aligns with the DICE model (Sirkin et al., 2005). A clear, substantiated methodology in which to explain the process and the outcome is provided. Working within the theoretical

assumption that the proposed solution of an EDI policy analyst is applied, perhaps in tandem with an external consultant or liaison, praxis would further suggest an epistemic justification of the purpose and the content.

The perspectives of the key stakeholders (owner, director) are influential to other stakeholders (parents, staff, superintendents). Stakeholder-directed communication could affect the success or failure of the progress and resulting sustainability of the change process (Koller et al., 2013). Communication between an external consultant such as myself and the newly created position of EDI policy analyst will serve to increase rapport between those engaged with the key stakeholders. Clarity of commitment and sustainability would support the dynamics of change.

An implication of the value-added perspective of Armenakis and Harris (2002) includes that application of transformative change could constrain the process of EDI. This, in turn, could encourage a low-energy behavioural system (Koller et al., 2013) that is more complacent than enthusiastic. Another implication is a misapplication of Lewin's (1947a, 1947b) change model. To mitigate that possibility, the process should include action research, group dynamics, and a force field analysis as a more flexible approach (Rosenbaum et al., 2018; see Figure 3). This integrated approach of communication to change recipients with the high-energy commitment of the change leader involves the iterative process of inquiry and communicated change.

Communicated change flows from an unfreezing process (Lewin, 1947a, 1947b) and is cyclical within this domain. Related to this concept, Markiewicz and Patrick (2016) specifically referred to the "lessons learned" (p. 226). The theoretical process of social justice in education may lead to the understanding of a generalized program experience rather than specific evaluative questions (Markiewicz & Patrick, 2016).

### **Chapter 3 Conclusion**

This section highlighted the implementation, evaluation, and communication of change in relation to EDI practices in AAIS organizations. Integrating Solution 2—providing for an internal staff EDI policy analyst—would spur an infinite cycle of EDI progress between all stakeholders, who may benefit from key determinations of policy. This would allow and promote the implementation and sustainability of the change process. Clarity of expectations will be needed, as will understanding how to maximize application of EDI practice to program improvement (Markiewicz & Patrick, 2016). A key aspect of the success of attaining EDI in AAIS is the balancing act between facilitating participatory stakeholder engagement while preserving evaluator independence and objectivity (Markiewicz & Patrick, 2016).

The culminating factors of evaluative conclusions, recommendations, and lessons learned (Markiewicz & Patrick, 2016) is not the apotheosis of development but merely one evaluation of the framework. The alignment with future policy to secure sustainability may result in the persistent voice of revolutionary change in social justice and moral evaluation in EDI practices.

### **Next Steps and Future Considerations**

The vision of EDI in education and in society at large is a transformative process requiring transformative leadership. The revolutionary leader cannot wait to take full power before demanding change; instead, the collective must be revolutionary from inception (Freire, 1970/2018). Transformative leadership can incite a social justice revolution in education. It was never my intention as a scholar-practitioner to intimate a hierarchical position of achievement when comparing AAIS organizations aligned with Alberta-driven mandates. Instead, those involved must be aware that power and privilege exist in schools, and stakeholders need to understand how that is a systemic problem to create equitable education (Shields, 2018). Shields

(2018) further challenged that to be a transformative leader, one must convince others of being inclusive and reconstruct the ways in which people “think about children, families, cultures, the curriculum, and the wider society” (p. 44).

### **Recommended Next Steps**

Four recommended steps would result in accountability, sustainability, and monitoring as well as evaluation. They are as follows:

1. An EDI policy analyst will be recruited as a member of the senior management team at each AAIS site.
2. The creation and implementation of policy within the monitoring and evaluation frameworks as an aspect of sustainability and accountability will be completed.
3. PLCs within AAIS will be created and led by each organization’s EDI policy analyst.
4. PLCs will be merged across the 17 AAIS locations that allows a broad range of educational stakeholders to create a consistent framework of EDI practice.

An implication of creating a results-based managerial system to engage stakeholders in the task of addressing EDI in AAIS is multifaceted. It includes developing key performance and learning indicators and encouraging and supporting actors (Kusek & Rist, 2004). As the EDI directive is mandated within the *TQS* (Alberta Education, 2020), preestablished systems can be viewed as an imposition and lack buy-in from those involved (Kusek & Rist, 2004). B. L. Anderson (1993) outlined a continuum of systemic change matrix providing stakeholders with a common vantage point for communicating and deciding change. The process as identified, including the stakeholder readiness assessment (Cawsey et al., 2016) and B. L. Anderson’s continuum of systemic change matrix, together build a strong change path initiative that embraces current practice with newly established frameworks.

Consistent policy under the direction of a senior leader (EDI policy analyst) will provide opportunities for future leaders to question the direction and morality of their schools. Freire (1970/2018) suggested that leaders must believe in the potentialities of the people just as transformative leaders in education must believe in the potential of their students, staff, and community. The blend of external, multidisciplinary consultation—such as myself as a consultant collaborating with the EDI policy analyst—could provide a lexicon of situated pedagogy (Freire, 1970/2018). Freire (1970/2018) noted that “cultural synthesis serves the ends of organization” (p. 183). An ongoing commitment to structural, transformative change within AAIS could ripple out into political influence, economy, culture, and society regardless of a site’s geographical location.

### **Knowledge Mobilization**

Knowledge mobilization is also a next step for educational leadership to consider. The elements of impact and implementation finish with research that has academic merit and has relevance for community action (Phipps & Shapson, 2009). With the integrated approach of a collaboration between an EDI policy analyst (internal senior leadership), PLCs in each AAIS organization (internal change agents), and external multidisciplinary consultant support for expertise in EDI (external change agents), this paradigm of EDI could extend to the broader IE community as a systemic solution to a common problem. Presentation of this solution to the AAIS organizations and to the IE community at the International Education Conference and the Equity, Diversity, and Inclusion (EDI) International Conference are considerations for dissemination.

This OIP has highlighted more than a solution to align EDI across a multitude of agencies and stakeholders. It has closely examined Capper’s (2019) critical theory in conjunction with



connections between Lewin's (1947a, 1947b) three-step change model and Jones's (1991) work in issue contingency. The revolutionary sword of equity in education—equity as defined by access and opportunity as well as the valuation of an individual in their society—must be drawn without the bias of the worldview of existing influencers (Freire, 1970/2018; Shields, 2018). The preferred solution as proposed in this OIP suggests refreshing senior management with an EDI policy analyst to closely align with all stakeholders. This solution supports a synthesis within the epistemology and a disruption of the highlighted praxis in EDI (Freire, 1970/2018).

International school communities, and specifically AAIS, are key stakeholders to help influence a set of universal policies connecting existing national policy and practice. This framework could generate a powerful alliance between active encounters with the people inclined to continue to build theory, moving to practice. It is blatantly arrogant to suggest that society—whether traditional or modern—is doing everything wrong and ignorant to suggest that they are doing everything right with regards to EDI in education. Transformative leaders do not sit in fear of repercussions, ill-perceived consequences, or judgement. As catalysts in education, educational revolutionaries shall lead with Freire's (1970/2018) call for radical commitment to human liberation. Globalization in this commitment with policy and passion as drivers may continue the march towards this cry for revolutionized educational social justice.

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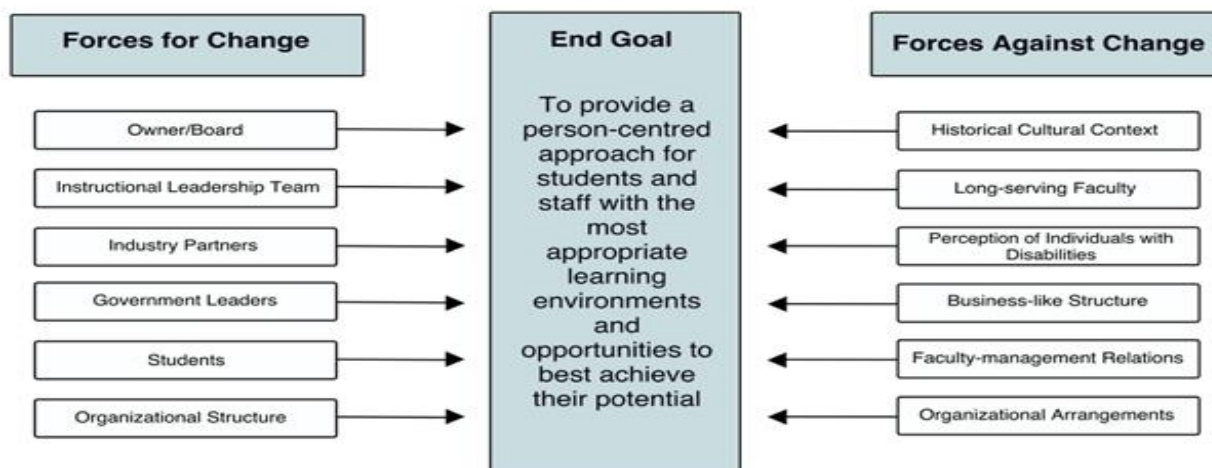
### Appendix A: Change Readiness Questionnaire

Readiness dimensions	Readiness score
<b>Previous change experiences</b>	
1. Has the organization had generally positive experiences with change?	If yes, Score +1
2. Has the organization had recent failure experiences with change?	Score -1
3. What is the mood of the organization: upbeat and positive?	Score +1
4. What is the mood of the organization: negative and cynical?	Score -2
5. Does the organization appear to be resting on its laurels?	Score -1
<b>Executive support</b>	
6. Are senior managers directly involved in sponsoring the change?	Score +2
7. Is there a clear picture of the future?	Score +1
8. Is executive success dependent on the change occurring?	Score +1
9. Has management ever demonstrated a lack of support?	Score -1
<b>Readiness dimensions</b>	
10. Are senior leaders in the organization trusted?	Score +1
11. Are senior leaders able to credibly show others how to achieve their collective goals?	Score +1
12. Is the organization able to attract and retain capable and respected change champions?	Score +2
13. Are middle managers able to effectively link senior managers with the rest of the organization?	Score +1
14. Are senior leaders likely to view the proposed changes as generally appropriate for the organization?	Score +2
15. Will the proposed change be viewed as needed by senior leaders?	Score +2
<b>Openness to change</b>	
16. Does the organization have scanning mechanisms to monitor the environment?	Score +1
17. Is there a culture of scanning and paying attention to those scans?	Score +1
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
19. Does "turf" protection exist in the organization?	Score -1
20. Are senior managers hidebound or locked into the use of past strategies, approaches, and solutions?	Score -1
21. Are employees able to constructively voice their concerns or support?	Score +1

Readiness dimensions	Readiness score
22. Is conflict dealt with openly, with a focus on resolution?	Score +1
23. Is conflict suppressed and smoothed over?	Score -1
24. Does the organization have a culture that is innovative and encourages innovative activities?	Score +1
25. Does the organization have communication channels that work effectively in all directions?	Score +1
26. Will the proposed change be viewed as generally appropriate for the organization by those not in senior leadership roles?	Score +2
27. Will the proposed change be viewed as needed by those not in senior leadership roles?	Score +2
Readiness dimensions	
28. Do those who will be affected believe they have the energy needed to undertake the change?	Score +2
29. Do those who will be affected believe there will be access to sufficient resources to support the change?	Score +2
Rewards for the change	
30. Does the reward system value innovation and change?	Score +1
31. Does the reward system focus exclusively on short-term results?	Score -1
32. Are people censured for attempting change and failing?	Score -1
Measures for change and accountability	
33. Are there good measures available for assessing the need for change and tracking progress?	Score +1
34. Does the organization attend to the data that it collects?	Score +1
35. Does the organization measure and evaluate customer satisfaction?	Score +1
36. Is the organization able to carefully steward resources and successfully meet predetermined deadlines?	Score +1

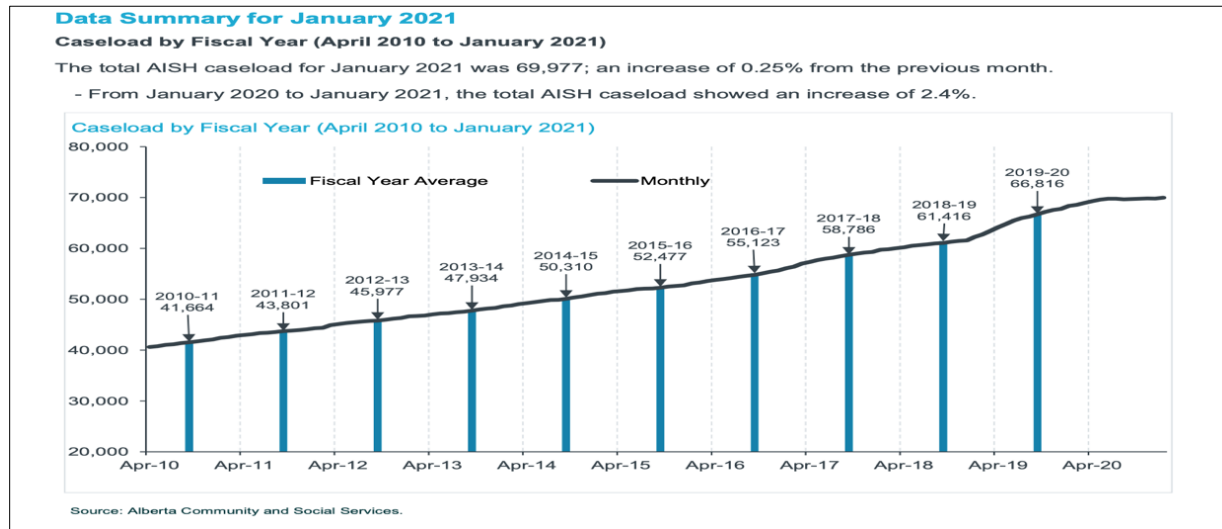
*Note.* This tool is based on the ABC School Division site as a representation of readiness for change across AAIS locations. Scores can range from -10 to +35. If the organization scores below 10, it is not likely ready for change. Higher scores equate to increased probability of change readiness. Adapted from *Organizational Change: An Action-Oriented Toolkit*, by T. F. Cawsey, G. Deszca, & C. Ingols, 2016, pp.108–110. Copyright 2016 by Sage.

## Appendix B: Forces For and Against Organizational Change



*Note.* Adapted from *Organizational Change: An Action-Oriented Toolkit* (3rd ed.), by T. Cawsey, G. Deszca, and C. Ingols, 2016, p. 35. Copyright 2016 by SAGE.

## Appendix C: Assured Income for the Severely Handicapped



*Note.* Reproduced from *Alberta Community and Social Services Open Data: Assured Income for the Severely Handicapped (AISH)*, by Alberta Community and Social Services, 2021

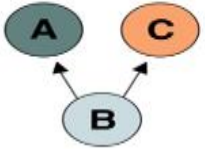
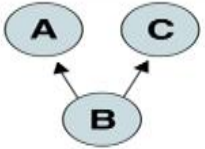
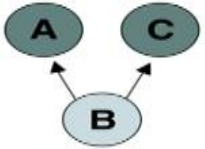
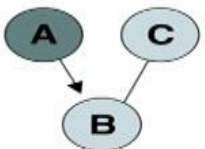
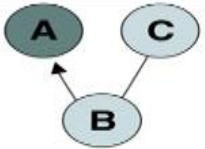
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### Appendix D: Stakeholder Understanding and Commitment

Stakeholder	Their view of change (issues/needs)	Where are they in the process <sup>a</sup>	Importance of their reaction?	Their power and influence	Who influences them?
Owners and directors	Theoretically: progressive; practically: progressive, neutral, and resistant (context dependent)	3, with possible opposition	High	High	Parent province
Superintendency	Progressive	5/6	High	Medium	Owners, directors, TQO, parents, staff
Administration	Progressive	5/6	High	Medium	All
School-based staff	Progressive	4, 5, 6	Medium	Low	All
Parents	Resistant, neutral, and progressive	1–6	High	Low	All
Community	Resistant, neutral, and progressive	1–6	High	High	Culture, policy, economy, internal and external factors

*Note.* 1 = unaware; 2 = aware & opposed; 3 = aware; 4 = interested; 5 = desiring action; 6 = adopting. Adapted from *Organizational Change: An Action-Oriented Toolkit* (3rd ed.), by T. Cawsey, G. Deszca, and C. Ingols, 2016, p. 204. Copyright 2016 by SAGE.

## Appendix E: Brokerage Ties Through Social Network Analysis

	<p><b>Liaison:</b> Actor B connects A and C without being part of either A's subgroup or C's subgroup.</p>
	<p><b>Coordinator:</b> Actor B coordinates the flow of information between C, A, B, and C belong to the same subgroup.</p>
	<p><b>Consultant:</b> Actor B facilitates the flow of information in A and C's subgroup, without belonging to the subgroup.</p>
	<p><b>Gatekeeper:</b> Actor B controls how information from other actors (A) outside its subgroup is transferred to those in its subgroup (C).</p>
	<p><b>Representative:</b> Actor B controls how information from its subgroup (C) is transmitted to actors outside its subgroup.</p>

*Note.* Adapted from “Policy Learning and Policy Networks in Theory and Practice: The Role of Policy Brokers in the Indonesian Biodiesel Policy Network,” by M. Howlett, I. Mukherjee, and J. Koppenjan, 2017, *Policy & Society*, 36(2), p. 237

(<https://doi.org/10.1080/14494035.2017.1321230>). Copyright 2017 by Taylor & Francis.



## Appendix F: Monitoring and Evaluation Plan for EDI Programming in AAIS

Evaluation questions	Summary of monitoring	Focus of evaluation	Evaluation method	Method implementation	Who is responsible and when
Appropriateness: What is the most significant change for stakeholders?	Stakeholder characteristics; stakeholder implementation	Differences in change process across multiple sites	Interviews; data from site-based schools regarding students' needs upon enrolment	Interviews; case study; reporting for three-year strategic plan	External consultant; superintendent and administration team for interpretation of data; ongoing.
Effectiveness: To what extent have stakeholders increased their knowledge and practice of inclusivity and equity in education?	Changes in knowledge from participation in sessions; accommodation tracking for student differentiation needs	Differentiation outcomes; areas of success/lack of success and reasons for both	Community forums; parent workshops; family interviews; interviews with associated agencies	Staff meetings; Enrolment data; reporting for three-year strategic plan	All stakeholders
Impact: Has the change initiative included stakeholders in the community and political sectors in addition to education?	Development of partnership agreements	Identification of changes attributable to the directive and unintended as well as intended results	Interviews; surveys; data tracking	Stakeholder meetings; information sessions	Upper management, superintendent, and external consultant
Sustainability: Is there evidence that the three-year strategic plan addresses continued movement towards inclusive practice?	Development of partnership agreements for continued initiatives	Viable partnerships/agreements developed; community stakeholder commitment demonstrated by clear directives	Stakeholder meetings/information sessions; professional learning communities	Stakeholder interviews; ongoing interview participation with site-based staff	Superintendent, external consultant, and inclusive learning team; bimonthly

*Note.* Adapted from *Developing Monitoring and Evaluation Frameworks* by A. Markiewicz and

I. Patrick, 2016, pp. 158–159. Copyright 2016 by SAGE.

### Appendix G: Calculation of DICE Factor Scores

Factors	Question	Score
Duration (D)	How often do change initiative review meetings happen? How long will goals related to the strategic plans remain as key goals?	Review happens in 1 month = 1 Review happens in 2 months = 2 Review happens in 3 months = 3 Review happens in 4 months or more = 4
Integrity (I)	Do change leaders and the team possess required skills and experience? Do change leaders and the team possess required motivation? Are additional training opportunities (i.e., professional development, consultant involvement) required to increase staff motivation and capacity?	Teams possess 80% or more than required skills = 1 Teams possess 60% or more than required skills = 2 Teams possess 40% or more than required skills = 3 Teams possess 20% or more than required skills = 4
Senior level commitment (C1)	Does senior management effectively communicate to the team on purpose of change? Is the message convincing?	Clarity of message at excellent level = 1 Clarity of message at good level = 2 Clarity of message at ordinary level = 3 Clarity of message at poor level = 4
Senior level commitment (C2)	Are employees given opportunities to share their feedback? Are employees supportive to the change leaders to implement the change initiative?	Relationship amid team at excellent level = 1 Relationship amid team at a good level = 2 Relationship amid team at an ordinary level = 3 Relationship amid team is at a poor level = 4
Effort (E)	How much extra work will be performed by staff? Are staff comfortable with the additional demands initiated by the change process?	If the extra workload is below 10% = 1 If the extra workload is below 10%–20% = 2 If the extra workload is below 20%–30% = 3 If the extra workload is below 30%–40% = 4

*Note.* Adapted from *What Is DICE Framework in Change Management?* by U. Tahir, 2020

(<http://changemanagementinsight.com/dice-framework/>). Copyright 2020 by Change

Management Insight.