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Reframing Behaviour to Foster Safe and Supporting Schools

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Abstract

This Organizational Improvement Plan (OIP) examines educator support to students who present with chronically challenging behaviours. Educators are experiencing an increase in the frequency and severity of interfering student behaviours affecting classroom learning, school climate, and educator mental well-being (RRDSB, 2018a, 2019b; Santor et al., 2019). Educators frequently disengage from these students and their discipline is managed by administration (RRDSB, 2019b). These students, often already members of marginalized communities (Bailey, 2015), are further marginalized by the use of exclusionary, punitive measures. This mandates a social justice framework that benefits from the moral dialogue evoked by transformative leadership (Shields, 2018). In conjunction, an ecological systems (Bronfenbrenner, 1977) approach that highlights student environment, in contrast to the culture of power and privilege of most educators (Delpit, 1988), is required. Nadler and Tushman's (1989) Congruence Model highlights the gap between Board system values and lived experiences in schools. Reframing the faulty notion that challenging behaviour is a student choice (Greene, 2014b, 2016; Levinsky, 2016) and reframing the purpose of education as human development (Tranter et al., 2018) for a socially just world (Weiner, 2003) is foundational to implementation. The OIP uses the Change Path Model (Cawsey et al., 2016) as the blueprint upon which to layer a plan that addresses educator mindset and skill development. The use of Hord et al.'s (1987) Concerns Based Adoption Model to value educator emotion and fidelity of practice compliments an authentic and adaptive leadership approach.

Keywords: challenging student behaviour, social justice, transformative leadership, Concerns Based Adoption Model, ecological systems theory, adaptive leadership, authentic leadership

Executive Summary

Positioned in a rural Ontario school board, this Organizational Improvement Plan (OIP) seeks to address the issue of educator mindset and response to challenging student behaviours. According to educators, interfering student behaviours are occurring more frequently and with greater severity (Santor et al., 2019). Educators report feeling ineffective and unable to manage students who demonstrate these behaviours (RRDSB, 2019b). They often characterize these students as wilfully defiant, raised by parents whose discipline is inconsistent, ineffective, or inappropriate (Greene, 2014b, 2016). This faulty perception promotes *othering* (Kumashiro, 2000; Lesser, 2014; Levinsky, 2016) of these students and directly impacts their academic and emotional outcomes. Many of these students are already marginalized by intersections of socioeconomics, family dynamics, trauma, special education needs, and cultural experiences that differ from those of the classroom educator (Bailey, 2015; Shields, 2018). This creates an issue of equity requiring examination through a social justice lens.

Chapter 1 examines the organizational context of Rustic Ridge District School Board (pseudonym), highlighting the value it places on innovative, personalized learning pathways for all students. Its commitment to evidence-based, responsive practices is hampered by the constraints of enveloped governmental funding and a neoliberal focus on academic competition. This compromises consideration of the social-emotional learning of the whole child (Miller, 2016). Based on the exclusionary treatment of students with challenging behaviours, who are often already marginalized in multiple ecosystems, the problem of practice is framed with a theoretical social justice focus and heavily influenced by an ecological systems theory (Bronfenbrenner, 1977) conceptual framework. Students exist in multiple ecosystems and these reciprocal environments affect their manner of presenting to the world, especially their way of

behaving (Bronfenbrenner, 1989). However, educators do not see their own engagement in the classroom microsystem as impacting or potentially contributing to challenging student behaviours (RRDSB, 2019b). Guiding questions therefore focus on educator insight, knowledge, and willingness to adopt a new relational focus and supportive skillset. Individual readiness is addressed by Holt et al.'s (2007) staff change readiness criteria while the organization's readiness is measured against Combe's (2014) Readiness Inventory.

Chapter 2 highlights the strong fit of transformative leadership to a problem of a social justice nature. The moral courage embedded in transformative leadership can balance critique and promise to challenge inequity and to focus on democracy and inclusion (Shields, 2018, p. 21). As the problem has elements that are technical—educator practice; and elements that are adaptive—educator mindset, an adaptive leadership approach is also adopted (Heifetz et al., 2009). The social justice focus of this problem of practice highlights the importance of moral dialogue (Shields, 2004). This focus on brave conversations (Arao & Clemens, 2013) requires an authentic leader (Avolio et al., 2004) who will build trust with congruence between the *walk* and the *talk* (Weick, 1995). A focus on strategy using Nadler and Tushman's (1989) Congruence Model features prominently in this organizational analysis. The chosen solution places importance on the student ecosystem and the reciprocal relationship between the educator and student (Bronfenbrenner, 1977, 1987). The trust bred through authentic leadership (Avolio et al., 2004) supports the vulnerability necessary to do the relationship-based work of this OIP.

In Chapter 3, implementation is discussed using the Change Path Model (Cawsey et al., 2016) with its focus on alerting staff to the crisis and creating plans to mobilize, accelerate, and institutionalize the change. Gathering data to inform the plan and using multiple Plan-Do-Study-Act models in target schools ensures precise, reflective intervention. As this is more than a shift

in practice, but also a shift in mindset, communication features prominently in planning. The growth and quality of an emotional change of this kind requires a Concerns Based Adoption Model (Hord et al., 1987) that monitors the skill development, presence of new practices, and concerns of educators as they navigate new learning. Issues of budget, leadership, and accountability are the focus for next steps and future considerations.

The end result is a reframing of behaviour as the communication of a student's unmet need—a need that presents within and is affected by the school and classroom ecosystem. In addition, this OIP requires a reframing of the purpose of education as one for human development of whole people who will live in an uncertain world (Shields, 2018; Weiner, 2003). Inclusion and equity must be at the forefront.

Acknowledgments

Reflecting on my years in education, this OIP has been an opportunity to put on paper what I have always believed to be true about student behaviour and the complexities of the educator-student relationship. It is not programs, not policies, and surely not politics that sculpt a child; it is the educator who learns *with* that child each day who helps shape their destiny. An educator's powerful presence contributes to the life narrative of every child they encounter. Their greatest influence is felt by those students with whom it is most difficult to connect. As educators, to these students, we are "powerful beyond measure" (Williamson, 1992, p. 165). To the amazing educators who understood this, thank you for allowing me to teach with you and learn from you.

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Acronyms

CBAM (Concerns Based Adoption Model)

CF (Change Facilitator)

OIP (Organizational Improvement Plan)

PDSA (Plan-Study-Do-Act)

PLC (Professional Learning Community)

PoP (Problem of Practice)

PPM (Policy/Program Memoranda)

RRDSB (Rustic Ridge District School Board)

SERT (Special Education Resource Teacher)

SSC (School Support Counsellor)

SW (Social Worker)

Definitions

Adaptive leadership is “the practice of mobilizing people to tackle tough challenges and thrive” (Heifetz et al., 2009, p. 14).

Authentic leadership refers to “persons who have achieved high levels of authenticity in that they know who they are, what they believe and value, and they act upon those values and beliefs while transparently interacting with others” (Avolio et al., 2004, p. 802).

Challenging behaviour is “any repeated pattern of behavior, or perception of behavior, that interferes with or is at risk of interfering with optimal learning or engagement in prosocial interactions with peers and adults” (Powell et al., 2006, p. 26).

Ecosystem is the bi-directional relationships and interactions between each unique individual and the multiple nested environments in which they engage (Bronfenbrenner, 1977, 1989).

Bioecological model is a refinement to Bronfenbrenner’s original ecosystem theory that emphasizes the way the inherent traits of an individual interact bidirectionally with the environment over time (Bronfenbrenner & Ceci, 1994).

Educator-child relationship is “the on-going interpersonal connections that develop over time between teachers and individual children in their classroom. Relationships are built up from interactions between two individuals and are thereby shaped by the characteristics, behaviors, expectations, and perceptions of each individual” (Lippard et al., 2018, p. 3).

Educators is a broad category including individuals within the school setting who impact the learning of students, both intentionally and unintentionally. It includes, but is not limited to, principal, vice-principal, teacher, early childhood educator, and special education teacher assistant.

Equity is “a condition or state of fair, inclusive, and respectful treatment of all people. Equity does not mean treating people the same without regard for individual differences” (Ontario Ministry of Education, 2013d, p. 9).

Inclusive education is “education that is based on the principles of acceptance and inclusion of all students. Students see themselves reflected in their curriculum, their physical surroundings, and the broader environment, in which diversity is honoured and all individuals are respected” (Ontario Ministry of Education, 2013d, p. 9).

Intersectionality is “the way in which people’s lives are shaped by their multiple and overlapping identities and social locations, which, together, can produce a unique and distinct experience for that individual or group, for example, creating additional barriers, opportunities, and/or power imbalances” (Government of Ontario, 2019, p. 56).

Marginalization is “a long-term, structural process of systemic discrimination that creates a class of disadvantaged minorities. Marginalized groups become permanently confined to the fringes of society. Their status is perpetuated through various dimensions of exclusion, particularly in the labour market, from full and meaningful participation in society” (Government of Ontario, 2019, p. 56).

Othering refers to individuals oppressed in and by mainstream society because they present as other than the norm (Kumashiro, 2000).

Social justice is the requirement to disrupt conditions that result in marginalization and exclusionary practices through processes that are based on respect, caring, and empathy with a focus on authentic community participation (Gewirtz, 1998; Goldfarb & Grinberg, 2002).

Strategy is “the patterns of decisions that emerge over time about how resources will be deployed in response to environmental opportunities and threats” (Nadler & Tushman, 1989, p. 194).

Transformative leadership “begins with questions of justice and democracy; it critiques inequitable practices and offers the promise not only of greater individual achievement but of a better life lived in common with others” (Shields, 2010, p. 2).

Trauma is an experience or cumulative experiences that are overwhelming in nature and compromise an individual’s belief that the world is good and safe and can seriously and in a negative way impact a child’s educational trajectory (Brunzell et al., 2016).

Chapter 1: Introduction and Problem

This Organizational Improvement Plan (OIP) examines an issue that continues to garner significant attention within schools and school districts across the province of Ontario. Using Rustic Ridge District School Board (pseudonym) as the backdrop, this OIP seeks to explore the planning for and the management of challenging student behaviours using an ecological relationship lens. The OIP contends that current exclusionary educator responses that blame the victim by pathologizing the lived experiences of these students—parenting, culture, identity, cognition, or class—mandates the use of a social justice theoretical framework (Shields, 2004).

This chapter will introduce Rustic Ridge District School Board (RRDSB) and situate it within the geo-demographic context of the district. The organizational context will be considered by exploring its mission, structure, and current leadership approaches. My leadership journey, beliefs, positioning, and agency will be considered. The exclusionary approaches and punitive responses to students with challenging behaviour will be examined in the leadership problem of practice (PoP). That PoP will be situated within the political, economic, and social-cultural conditions of RRDSB. With attention to guiding questions, a leadership vision will be established and measured against the change readiness of the organization.

Organizational Context

RRDSB is within Rustic Ridge, a geographically large expanse that extends more than 7,000 square kilometres and has a population of over 100,000 residents (Statistics Canada, 2016). English is the predominant language spoken in homes, and most homes are single family dwellings. RRDSB has an Indigenous population concentrated across one segment of the county but residing vibrantly throughout, and a significant military presence that results in family mobility affecting several schools. Rustic Ridge maintains a focus on apprenticeships, trades,

manufacturing, and forestry. Residents of Rustic Ridge complete college education at a higher rate than university degrees (Workforce Planning Ontario, 2018). There is a wide variance in incomes across the county with some high paying industrial work skewing averages. In general, income in Rustic Ridge is approximately 4/5 of the national average (Workforce Planning Ontario, 2018).

RRDSB has close to 30 schools servicing over 9,000 students with variations of K-12, K-6, and Grade 7-8 schools. It provides adult education services at multiple locations and partners with the coterminous board to oversee day treatment sites. These joint service sites blend academic and mental health supports for students and their families when behaviour and emotional needs have exceeded the resources available in home schools.

The Board situates its main office at one end of the physically expansive county. With such a broad physical jurisdiction—one of the largest geographically in the province—it can be difficult for schools to feel connected. Novel forays into virtual learning realized in the wake of COVID-19 have resulted in new avenues for coaching, consulting, and learning that are proving beneficial in such a geographically broad district.

Vision and Mission

The Board defines itself as a family of learners where creative, innovative learning is valued and the individualized, unique journey of every student is celebrated (RRDSB, 2020a). This fuels the Board's students-first approach. Foundational to this is the focus on well-being and social-emotional learning in combination with academic success. Its multi-pronged strategic planning focuses on academics, inclusive approaches, and thoughtful allocation of resources (RRDSB, 2017a).

The Board's vision is especially clear in its management of special education. Its successful inclusive approach for students experiencing academic challenges is evidence of a liberal framework where respect for individual differences is realized through personalization of supports (Gutek, 2013). This liberalist structure flows from the Board's mission statement that highlights a variety of roads to individual success (RRDSB, 2017a). Evolving from this, its current planning document highlights a focus on global citizenship with innovative learning requiring character competencies and a sense of positive well-being (RRDSB, 2020a). In the Special Education Report (RRDSB, 2014), the department articulates as its purpose the connecting of school, home, and community to create a compassionate environment that recognizes individual differences.

An Indigenous perspective is visible in the Board and its schools as it considers every child unique in their learning journey and knowledge construction (Battiste & Henderson, 2009). The Board seeks input from members of the local Indigenous communities, weaves this input into policy and support documents, and attempts to foster a respect for two-eyed seeing—the combination of Indigenous and mainstream ways of knowing (Bartlett, 2012).

Staff throughout the county embrace the RRDSB's philosophy of inclusion, universal design, differentiation, personalization, and a team approach for students who present with academic challenges. It undertook a feedback-driven focus group review in 2014, which resulted in a perceptual redefining of the role of the department. A visionary leadership team, dynamic professional development, and an expectation that every employee has a role to play in fostering belonging for students of all academic profiles can be credited for this successful restyling of the Special Education Department. Recently, another review of the department's practices and processes was undertaken (RRDSB, 2019b) and its recommendation to examine

the Board's approaches to behaviour and well-being have informed the PoP embedded in this OIP.

The Structure

The Board uses a hierarchical organizational model that benefits the operations of the whole body by standardizing the parts. Its functionalist modeling focuses on power structures to develop order, maintain status quo, learn norms and values, and understand how to be a member of a system (Burrell & Morgan, 1979; Leriche, 1991; University of Minnesota, 2015). The challenge with this framework is that change can be difficult to achieve as the system is relatively closed. This traditional model is predictable and stable, with information controlled from the top down, which can make grassroots, bottom-up change initiatives difficult (Behar-Horenstein, 2004). This focus on a hierarchical model makes the organization extremely reliant on the quality of persons in leadership.

Leadership Approaches

Despite its hierarchical model, the Board attempts to use democratic or shared leadership to allow the many to influence the few (Starratt, 2001). Community voice has been encouraged through regular use of stakeholder surveys, interviews, and focus groups. Within its tiered structure, the board relies on distributed leadership in the form of consultants and coaches (Holloway et al., 2018; Torrance & Humes, 2015) to do the curricular, skill-driven professional learning, often in response to the mandates of the province. In addition to this teacher-leader model, several system-level administrators interpret the Ministry direction and work to realize Ministry deliverables in the field. Finally, closer to the action but farther from the decisions, are the in-school administrators, whose leadership, due to the many demands from above and below, can often feel more transactional than transformational (Winton & Pollock, 2013).

Considerations and Challenges

In contrast to the Board's strong, publicly articulated commitment to data gathering and responsive practices, it must allocate and use funds in accordance with the deliverables outlined by the Ontario Ministry of Education. This control of funding from the province can make local initiatives—whose need is evidenced by Board data—unfunded and unrealized. In response, staff at RRDSB report fatigue with the continuous introduction and rapid change of Ministry initiatives (RRDSB, 2019a).

An additional organizational paradigm in juxtaposition to the critically reflective tendencies of liberalism, is the neo-liberal focus that reduces critical thinking for students and leaders (Canner, 2010). This performance-based focus may be a response to competition for market share between coterminous public school boards, privatized boards, and home school organizations. However, boards valuing competition over collaboration (Davies & Bansel, 2007) are often forced into austerity measures resulting in underfunding with fewer supports for student diversity (Carpenter et al., 2012). A neoliberal focus on provincial standardized testing and RRDSB's Board-wide focus on French Immersion can challenge the equity stance. Streamlining of funds toward standardized testing and away from diverse student learning needs results in strained resource pools. A competitive French Immersion program can have, as an unintended consequence, an overloading of the non-French Immersion core program with students from lower socioeconomic backgrounds and with higher learning needs (Alphonso, 2019; RRDSB, 2020b). Both of these realities have relevance to this PoP. The default creation of core classes with concentrations of higher learning needs and lower socioeconomic status results in classroom profiles that may require specialized supports not considered in funding formulas. It is imperative, in order to avoid continued marginalization of our most vulnerable

students, that the Board recognizes this and current approaches to behaviour management as urgent social justice issues. Failing to recognize this will permit the continuation of the deficit beliefs and exclusionary practices that are negatively affecting student ecosystems county-wide for these students, their families, and their peers.

Leadership Position and Statement

Central to my leadership beliefs is the recognition that leadership is not synonymous with authority. Authority can provide a captive audience and access to the tools required to enact change, but leadership, when people become vulnerable and willingly place their trust in you, is where the enduring, transformative change occurs (Heifetz et al., 2009).

From Where do Leaders Come?

Schein's (2006) observation that "leadership is a relational concept and is very contextual" (p. 256) is a generally accepted tenet. Considering this, it follows that leaders operate within systems, cultures, and environments—ecosystems. They bring with them their predispositions, their temperaments, and their histories when they engage in leadership work (Bronfenbrenner, 1989). One of the most fascinating experiential histories that they carry is their own exposure to leadership—as a follower. Leaders aren't born in some abstract moment in time when people begin following them by choice or by mandate. It is my belief that they are moulded by their life experiences and their involvements with those whom they have followed.

The most inspiring memories I have of being a follower were those prolonged engagements with hopeful actors, those leaders who were transparent, highly committed, and who encouraged supportive inquiry (Avolio et al., 2004). I could be vulnerable because I trusted them, and that vulnerability allowed me to learn and grow. Imperative to that trust was my belief that my leader was honest, morally upright, and would openly support me, as long as I did the

right thing (Dirks & Ferrin, 2002). Those experiences as a follower in combination with one's past events, one's actions, and the resulting wisdom and expertise, become a person's history. When the resultant values, identity and goals align with those of the leader's, individuals are more likely to commit (Gardner et al., 2005).

The leader-follower relationship is bi-directional, operating within a system where organizational culture contributes (Bronfenbrenner, 1977). "An inclusive, caring, ethical, and strength-based organizational climate" (Gardner et al., 2005, p. 348) plays a role in developing leaders and followers. Perhaps due to the positive culture in RRDSB's Special Education Department and the presence of authentic leadership, I became an authentic follower. The connection that exists between authentic leaders and followers is an important one. Authentic leaders meet their followers' needs for competence, autonomy, and relatedness (Ryan & Deci, 2001). They uncover their talents and encourage them to trust in their abilities, aspiring to self-efficacy (Bandura, 2000). Authentic leaders can move followers' regulation from external—prompted by the environment, and introjected—acting from *should* or *guilt*, to identified—accepting behaviours as values, to integrated—values are part of the sense of self (Gardner et al., 2005). This dovetails with Sheldon and Houser-Marko's (2001) goal striving model of self-concordance. A self-concordant identity meets an individual's needs for autonomy, competence, and relatedness (Ryan & Deci, 2000) and when there is identification between an authentic follower and an authentic leader, the results are self-actualizing. Authentic leaders can also influence followers who are discrepant with their authenticity. Over time, a trusting relationship can be developed that may trigger self-discovery for followers with discrepant perspectives (Gardner et al., 2005).

Authenticity promotes worker identification, hope, trust, optimism and positive emotion, with trust being the most significant of these outcomes (Avolio et al., 2004). Interdependent relationships where individuals feel confident risking vulnerability, secure in the knowledge that someone competent can be relied upon to tell the truth and protect them from harm, is what creates trust (Ilies et al., 2005; Tschannen-Moran & Hoy, 2000). Simons (2002) references a word-deed alignment that is required to achieve the follower perception of behavioural integrity; essentially, the importance of leaders whose talk is congruent with the places they have walked (Weick, 1995). Gardner et al. (2005) express it clearly when they note that “followers authenticate the leader when they see consistency between who they are and what they do” (p. 348). It is worth noting that these same descriptors can be applied to safe and supportive teacher-student relationships in a child’s ecosystem, a foundational concept in this OIP (Baker, 2006; Berry & O’Connor, 2010; Hamre & Pianta, 2001; Lippard et al., 2018; O’Connor et al., 2011). In periods of extreme uncertainty, “people feel apprehensive and insecure about what is going on around them, and as a result, they long for bona fide leadership they can trust and for leaders who are honest and good” (Northouse, 2019, p. 197).

From Follower to Leader

I attribute the authentic leadership style I have developed in part to what Gardner et al. (2005) call “trigger events that can be antecedents for authentic leadership development” (p. 347). Life events can be the catalyst for leadership despite a lack of formal training. Komives et al. (2007) remind us that leaders driven by authentic values, who understand their own strengths, can learn leadership strategies. Tuana (2007) identifies four related and complimentary competencies: self-awareness, internalized moral perspective, balanced processing, and relational transparency. These competencies empower authentic leaders to reveal their strong

ethics and lead with moral purpose, courage, and hope. For me, that moral purpose brings my social justice lens into focus. In this OIP, my social justice focus aligns with Gewirtz's (1998) requirement to disrupt conditions that result in marginalization and exclusionary practices through processes based on respect, caring, and empathy. Central to Goldfarb and Grinberg's (2002) focus on authentic community participation is the presence of "critical, participatory, equitable, and just relationships; creating safe and trusting spaces" (p. 170) by doing *with* individuals instead of doing *to* individuals (Costello et al., 2010).

There is a suggestion that leaders who value social justice need to be politically perceptive to slip social justice covertly into their work (Ryan, 2010; Ryan & Tuters, 2017; Winton & Pollock, 2016). Perhaps due to changes in the political landscape of late, my experience has been that leaders who have a well-balanced, authentic belief in social justice, versus an identity politics brand *flavour of the week* approach, are respected by staff (Gardner et al., 2005; Heifetz, 2006; Theoharis, 2007). Leaders who have cultivated relationships with their staff in environments where all voices matter can have genuine, tangible conversations where the real learning can happen in spaces of bravery (Arao & Clemens, 2013). Without these risky, vulnerable conversations, there can be no deep and fulsome learning and definitely no chance for meaningful change. Success depends on trust.

Agency

Revisiting the contrast between authority and leadership, my current role gives me increased authority to action items in service of unheard voices. This special project role has tasked me with examining the current conditions around behaviour and well-being within RRDSB's elementary schools. In addition, I will produce for senior staff a review and recommendations for future direction, and action those recommendations. The work is a

partnership between the departments of Special Education and Mental Health and Well-Being. These distinct departments are a natural fit for collaboration around equity of service for students who present with interfering behaviours.

As a vice principal and previous consultant, the familiarity I have with special education and school administration brings a sense of focus to the work. As a consultant in the Special Education Department I was involved with the goal of moving away from deficit thinking to view students and their families through an asset lens, and to hold educators accountable for changing their practice in response to student academic needs. My work as a vice principal introduced me to another gap in understanding, resource allocation, and support. Despite the work in the Special Education Department to foster inclusion for students with academic challenges, we are still excluding a particular group of students from learning opportunities and social acceptance. Unlike students with challenges in academics, students with lagging skills in the area of behaviour are often perceived to be choosing their negative behaviours (Greene, 2016; Levinsky, 2016), raised by families unsupportive of school expectations (Greene, 2014b). This perception is directly impacting the academic and emotional outcomes for students with challenging behaviours. My exposure to school populations as an administrator has brought to my attention what appear to be contributory or comorbid factors across ecosystems for students with challenging behaviours. These factors include social-developmental lags, learning needs (Halonen et al., 2006; Mehrotra et al, 2011), and socioeconomic needs (Kaiser et al., 2017).

While my role as vice principal may provide more authority, the leadership I experienced as a consultant was where the true perception-changing conversations occurred. The importance of observing, interpreting, and intervening to support people in their productive zone of disequilibrium (Heifetz et al., 2009) made the real difference. Recognizing the need for adaptive

versus technical change, getting off the dance floor to see the view from the balcony, and creating a holding environment so people feel safe while tackling tough problems (Heifetz, 2006, p. 32) is essential to combining big picture thinking with personalized relationship building. Leadership that supports “people who need to confront tough problems” to “help others do the work they need to do in order to adapt to the challenges they face” is paramount to change success (Northouse, 2019, pp. 257–258).

In keeping with a relational model, leadership of the administrative type is not the primary element that moves schools to better places. The critical ingredient in improving the school experience of a child is not a program, a practice, or a model; it is the bringing to life of those programs, practices and models through the individuals who stand before and beside these students every day. Noted by Leithwood et al. (2004), “leadership is second only to classroom instruction among all school-related factors that contribute to what students learn in school” (p. 5). I would add to that the pivotal importance of educator-student relationships that contribute to the social-emotional learning and well-being of students (Baker, 2006; Berry & O’Connor, 2010; Lippard et al., 2018; Pianta & Walsh, 1996; Tranter et al., 2018). Fullan (2015) reminds us that “top-down leadership doesn’t last even if you get a lot of the pieces right, because it is too difficult to get, and especially to sustain, widespread buy-in from the bottom” (p. 24). To that I would add that instead of seeking buy-in, we should be seeking input. The grassroots voices—staff in the case of administrators, students in the case of educators—made audible through authentic relationships, must be a major part of any plan for success.

In listening to these voices, it has become clear that educators are feeling helpless, stressed, and concerned for the effect on learning for all students—those regularly exhibiting challenging behaviours, and those who are witnessing it (RRDSB, 2018a, 2019a; Santor et al.,

2019). This prompted me to complete a professional learning query (RRDSB, 2019a) where 50% of the educators in one school expressed a desire to learn how to better manage classroom behaviour. Subsequent to the creation of a professional learning community (PLC) based on this interest, positive responses collected in a feedback survey confirmed that, with the commitment of leadership and supportive resources, educators believed it was possible, and desirable, to reframe behaviour to create safe and supporting school environments (RRDSB, 2019a).

My OIP was sparked by those early PLC discussions. The District's interest in that school-based PLC work, in conjunction with the results of their own Special Education Review (2019b), prompted action. This led the Board to create my current role where I am tasked with gathering data to inform the creation of a plan and leading the learning based on that plan.

Leadership Problem of Practice

In autumn 2013, four Ministry goals were unveiled in Ontario: achieving excellence, ensuring equity, promoting well-being, and enhancing public confidence (Ontario Ministry of Education, 2014a). The assertion that academic achievement is no longer sufficient for success in schools recognizes that we are facing complex academic environments. Beyond being institutions of academic learning, schools are home to mental health challenges, worries of violence at school, histories of trauma, harmful effects of digital technology, rising numbers of refugee children, and tensions between cultural, gender, sexual orientations and identity groups (Alexander, 2019; Craig, 2016; Hargreaves et al., 2018). A provincial longitudinal report (Ontario Ministry of Education, 2014a) notes: "The world is in turmoil. Our schools and school systems have to respond" (Ontario Ministry of Education, 2014a, p. 5). *Achieving Excellence: The Renewed Vision for Education in Ontario* (2014a) cautions us that "students cannot achieve academically if they feel unsafe at school" (p. 15).

In keeping with this critique, educators report an increase in aggressive and non-compliant behaviours in schools in Ontario (Santor et al., 2019). The chronic, interfering student behaviours in Santor et al.'s (2019) study include: raging, defiance, disrespect, verbal taunts, incivility, threats of violence, and the use of physical force. These student behaviours are not matched to the knowledge and skills school staff utilize to plan for, and manage them (Greene, 2014b). Educators and students are experiencing the negative effects (Santor et al., 2019; Thomas & Bierman, 2006).

In RRDSB classrooms, this increase in challenging student behaviours compromises classroom learning and well-being. Students with frequently occurring interfering behaviours experience negative school relationships and reduced academic success (Hafen et al. 2015; Hamre & Pianta, 2001; Greene, 2014a; Lippard et al., 2018; Murray & Greenberg, 2001; Zolkoski, 2019). Teachers report feeling stressed in the face of this reality and unsupported by the system, often naming student behaviour as the most challenging component of their jobs (Cameron & Sheppard, 2006; Clunies-Ross et al., 2008; Nash et al., 2016; RRDSB 2018a, 2019a, 2019b; Santor et al., 2019; Thompson & Webber, 2010; Westling, 2010). Despite the proactive focus of progressive discipline (Bill 212, 2007; Ontario Ministry of Education, 2013b), and the clear positioning of behaviour as communication in the province's special education policies (Ontario Ministry of Education, 2010, 2013a), there still exists a retroactive rewards and punishment model, where negative behaviours are viewed as choices that are intentional and within the student's control (Levinsky, 2016). This perception of student choice or motivation as the factor influencing behaviour removes considerations of skill development, level of readiness, and environmental ecological influences (Greene, 2014b).

Despite valuable Board-created resources and provincial supports that focus on mental health (Ontario Ministry of Education, 2013c; RRDSB, 2017b) significant change to Board-wide classroom practice has not been evident (RRDSB, 2019b). Educators often disconnect from students with challenging behaviours and assign their behaviour management to school support counsellors (SSC) or administrators (RRDSB, 2019b). Considering the importance of the educator-child relationship in a child's school ecosystem (Berry & O'Connor, 2010; Bronfenbrenner, 1977; Lippard et al., 2018; Zolkoski, 2019), regular conflict with educators places a student at risk for a negative educational trajectory (Hamre & Pianta, 2001; O'Connor et al., 2011). The lack of a Board-wide, cohesive plan to support these students in a manner that improves their relationship structures, in their primary ecosystem—the classroom, results in a marginalized student population whose access to inclusive services is being denied. Unlike students with academic-based needs, students with needs in the area of behaviour are not receiving equitable consideration and access to supports. Due to Board-wide professional learning and coaching around academic student profiles, students at RRDSB have access to academic programming that is at their level with a focus on proactive, supportive structures that value connections to the classroom ecosystem. However, students who exhibit chronic challenging behaviours experience punitive treatment that is retroactive, exclusionary, and damaging to their classroom relationships. This is not equitable.

The previous special education reforms at the Board level succeeded in reframing thinking around supports for students with needs in the area of academics. Considering this success, could reframing interfering student behaviour from a perspective that challenges the existing conceptual and emotional context (American Psychological Association, 2020) and

improves educator understanding, shape the creation of new approaches and practices to support student behaviour across the District?

Framing the Problem of Practice

Viewing the PoP in its contextual framework is necessary to better understand the many elements at play. The political and economic landscape and the social and cultural elements involved in behaviour management within the RRDSB workplace are relevant.

Political and Economic Context

Ontario's response to behavioural challenges has evolved over time. Faced with a spike in weapons, drugs and violence in schools across Canada and the US (MacGregor, 2010), the Ontario Ministry of Education adopted Bill 81—Safe Schools Act (2000), often referred to as a zero tolerance approach to behaviour management. When it became apparent that under this policy suspensions and expulsions rose in an unacceptable way and that marginalized students appeared to be repeatedly excluded from schools (Findlay, 2008; Levinsky, 2016; Peden, 2001; Verdugo, 2002), the Ministry introduced Bill 212—Progressive Discipline and School Safety (2007). Four Policy/Program Memoranda (PPMs) to support implementation followed including one that addressed bullying prevention and intervention—PPM 144 (Ontario Ministry of Education, 2018a), and one focused on progressive discipline and promotion of positive student behaviour—PPM 145 (Ontario Ministry of Education, 2018b). Bill 157—the Keeping our Kids Safe at School Act (2009), and Bill 13—the Accepting Schools Act (2012), followed. What resulted was a whole school approach with a range of responses meant to promote positive student behaviour.

Turning 180 degrees from Bill 81—the Safe School Act (2000), the passing of Bill 197—the COVID-19 Economic Recovery Act (2020), has removed discretionary suspensions of

students in kindergarten to Grade 3. Premier Ford noted that half of suspensions in Ontario schools were delivered to students with special education needs (CP24, 2020). The Minister of Education, Steven Lecce, shared that although Black students represented only 11% of Toronto District School Board's population, they accounted for 34% of the suspensions (CP24, 2020). Lecce explained that "two million students depend on our ability today to break down barriers to their success that impede their upward mobility and to break down those biases that exist within our society. The status quo is morally indefensible" (Wilson, 2020). Punitive responses to student behaviour based on biased thinking that disadvantage students with special education needs, students of colour, students with histories of trauma, or families experiencing socioeconomic difficulty clearly positions this as a social justice issue.

Bill 197 (2020) mandates alternatives to discretionary suspension based on positive behaviour supports and interventions such as, restorative practices, counselling, mental health supports, problem solving, teaching behavioural expectations, family conferences, and restitution. The Government of Ontario is making investments in mental health and academic inclusion. Through the Grant for Student Needs (Ontario Ministry of Education, 2021), \$40.9 million is being allocated to support implementation of new suspension policies including hiring staff and pursuing programs to prevent, address, and intervene for students with behaviour challenges. In addition, \$10 million from new mental health funding can be allocated toward training and implementation of new suspension policies (Government of Ontario, 2020).

The political and economic stage is set. There is recognition that punishing and excluding students with challenging behaviours is having catastrophically negative effects. The big message is clear; however, without a plan that outlines clearly how to manage behaviour differently, boards will be tasked with determining the details individually and independently.

Overlooking the planning for change will result in failure (Cawsey et al., 2016; Whelan-Berry & Sommerville, 2010). This OIP answers the call for a change plan.

Social-Cultural Elements

RRDSB's transformative Special Education Department reimagining for students with academic needs stopped short of addressing behaviour. An extensive consultant coaching and PLC model delivered strong result; however, this well-resourced, inclusive approach has not generalized to students with challenging behaviours. For these students, it becomes an issue of social justice. The status quo allows an exclusionary response within the school community that further marginalizes a group of students—who are often already experiencing environments of poverty, conditions of trauma, have racialized identities, or are accessing special education services (Alexander, 2019; Bailey, 2015; Craig, 2016). These exclusionary behaviour response practices often coincide with a culture of low expectations where a true commitment to humanizing and investing in these students is lacking (Smith, 2016).

There appears to be a perception difference. Students with lagging skills in academics are perceived to be doing their very best, but due to cognitive skill deficits they require supports in the form of accommodations and modifications. Conversely, students with lagging skills in the area of behaviour are perceived to be unmotivated to behave according to the expectations (Greene, 2016; Levinsky, 2016). According to Nash et al. (2016) students with lagging skills in the area of behaviour are often perceived by their teachers to be generally in control of their behaviours and making conscious choices to disrupt, act out, or demonstrate non-compliance. Based on the deficit thinking (Shields, 2018) that their challenging behaviour is a choice, the solution is to motivate them to behave appropriately and to punish them if they do not (Greene, 2016). As Greene points out, this is not a question of motivation, and no internal cognitive skills

are developed with carrot and stick models, save for the situation-specific skills of performing for reward and working to avoid punishment. In actuality, these common behavioural approaches may result in reduced task interest, and compliance that is temporary, at best (Bailey, 2015; Deci et al., 1999; Pittman et al., 2007). The Board-mandated Behaviour Management Systems (2014) Training, provided to only a limited number of educators, highlights the connection between mindset and educator response. It notes that if educators believe that inappropriate behaviour is on purpose, they will seek to punish; if they believe a number of factors outside of the student's control trigger their behaviour, they will seek to support. It is evident that changing educator perception will be paramount to changing outcomes within the Board.

Even without a formal diagnosis, students with lagging skills in academics are supported by a response to intervention model. Educators understand that asking a child with a reading disorder—lagging skills in decoding—just to try harder would be cruel and would do nothing to advance the child's ability to read. However, educators regularly respond to students' challenging behaviours by excluding, removing privileges, publicly reprimanding, and telling them that they should just try harder (Greene, 2014b). There is a clear difference in perception and approach between students who present with challenges in the area of academics when compared to students who present with challenges in the area of behaviour.

Figure 1

Differential Analysis of the Gap Between Mindset for Academic Versus Behavioural Support

Support Model for Students Presenting with Academic Challenges at RRDSB	Support Model for Students Presenting with Behaviour Challenges at RRDSB
• common assessment tools	• no common assessment tools
• proactive approach	• retroactive approach
• frequent professional learning provided	• limited professional learning provided
• extensive planning	• limited planning
• common language for communication	• no common language for communication
• asset lens	• deficit lens
• defined staff role/expectations	• poorly defined staff role/expectations
• team approach that includes teacher	• no clear teacher team approach required
• expectations tailored to be developmentally appropriate for each student	• one size fits all behaviour expectations regardless of developmental readiness
• positive staff-student relationships	• strained staff-student relationships
• informed solutions	• uninformed solutions
• expectation of inclusion	• acceptance of exclusion
• skill development/teaching focus	• punitive/consequence focus
• student learning new skills	• student learning to avoid consequences
• intrinsic motivation cultivated	• extrinsic motivation cultivated
• trusting, supportive parent connections	• critical, demoralizing parent connections

This cultural mindset needs to be re-examined in order to elicit socially just responses from educators (Weiner, 2003). Processes and practices of marginalization (Gewirtz, 1998) must be met with participatory responses that ameliorate the power dynamic and replace it with collaboration, empathy, and compassion (Goldfarb & Grinberg, 2002; Weiner, 2003).

When contrasted with the approach for students whose needs are primarily academic, the recognition that behaviour is the communication when students lack the skills to meet the expectations placed on them, is missing (Greene, 2014b). This mismatch between educator expectations and student skills results in unmet expectations, unsolved problems, and “incompatibility episodes” (Greene, 2016, p. 31). Recognizing that the punitive, exclusionary treatment of students with challenging behaviours represents an issue of equity, and recognizing that contributing factors may reside within multiple ecosystems, including the classroom ecosystem, will be new learning for staff. Expanding spheres of influence to suggest that for students with interfering behaviours educators need to expand their work beyond teaching the

curriculum into building relationships and educating for social-emotional learning, will also present a new focus for staff.

Guiding Questions Emerging from the Problem of Practice

Evaluating RRDSB's success with its transformative approach in special education, it is evident that educators are able to grow their understanding and enrich their practices to address the academic learning needs of their students. The fact that this has not generalized to students with challenging behaviours raises questions.

Question #1

How does teacher perception and understanding of chronic interfering behaviours play a role in the contrast between the proactive, supportive approach adopted for students with academic challenges compared to the reactive, punitive approach for students with behaviour challenges? When planning for and working with students with academic challenges, educators recognize a developmental delay in particular skill areas that are required for academic success. However, the same is not true for students who present with challenging behaviours. This continues to keep educators mistakenly believing in behaviour as choice (Levinsky, 2016). Anecdotal staff room conversations and educator comments contain such phrases as: doing it on purpose, wants attention, is manipulating, just not trying, does not want to change, likes to be disruptive, and does not care about anything (Greene, 2016). The indication is that little has changed since Cothran and Ennis (1997) reported similar teacher perceptions of student motivation for disruptive behaviour. Teacher perceptions did not match the student explanations then, and they probably would not match them now.

Most educators agree that students want to do well academically. If educators believed that students also wanted to do well behaviourally—that they would if they could, then each and

every concerning student behaviour would be the expression of an unmet need (Van Marter Souers & Hall, 2018). This fundamental tenet sets the stage for responsiveness. Behaving adaptively requires motivation and skills (Greene, 2016). If educators take motivation off the table, assuming that “kids do well if they can” (Greene, 2016, p. 5), then student skills become the focus.

Question #2

How well do classroom educators understand the relationship between punitive classroom structures and the resultant strained educator-student relationships? Student ecosystems that use exclusionary discipline (Gregory et al., 2014) and punitive practices done *to* a student instead of collaborative and proactive strategies done *with* a student (Wachtel, 1999) create environments that use a damaging means of handling student difference (Gregory et al., 2014). Excluding, shaming, stigmatizing, and punishing result in anger, disengagement, and decreased academic performance (Perry & Morris, 2014). The effect does not end with the individual. Long after the punishment, the collateral damage can socially fragment the school community, break the trusting relationships with school staff, and poison the bonds educators build with families (Perry & Morris, 2014). Conversations at the system level and within schools must consider the effects of unhealthy school and classroom ecosystems and the marginalizing practices that extinguish student safety and belonging (Bailey, 2015).

The current practice of offloading students exhibiting chronic challenging behaviours to administrators and SSCs affects the connection between these students and their primary educators (Parsonson, 2012). It is possible that educators do not fully recognize the connection between their classroom ecosystem and the success or lack of success for students with challenging behaviours. When supportive classroom ecosystems are weak, students who exhibit

interfering behaviours are further marginalized and peers are taught that it is acceptable to exclude students whose social-emotional learning and behaviour presents differently (Gregory et al., 2014; Lewinsky, 2016). If educators had this deep understanding, it is hoped that they would recognize the importance of classroom ecosystems that grow and strengthen relationships of safety and belonging (Bailey, 2015; Lippard et al., 2018).

Question #3

How comfortable are educators with their responsibility to embrace the knowledge and build the practices required for deep change? Some educators do not include themselves in the school-wide community responsible for using proactive approaches and teaching a social-emotional curriculum (Skiba et al., 2016). They believe that behaviour is the responsibility of the administration and the SSC and that their job is to manage the academic instruction (Santor et al., 2019). RRDSB's (2019b) most recent Special Education Review noted confusion among educators around their responsibility for teaching, monitoring, and improving skills in the social-emotional domain. It raised questions around educator understanding of their accountability. For those who recognized their work as behaviour support that occurs through safe, caring educator relationships in healthy classroom ecosystems, they still reported a limited understanding of how to create those necessary structures (RRDSB, 2019b). Despite the variety of resources available, the Board has not endorsed a common set of tools, strategies, programs, and philosophies to guide teachers in strengthening lagging student skills in the areas of flexibility, adaptability, frustration tolerance, and problem solving (Greene, 2014a). Educators act based on their current knowledge, resources, and expectations for accountability. If elements of this formula are faulty and there is no work done to redefine these elements, practices will continue to feature antiquated, punitive attempts at adult control of student behaviour.

Leadership-Focused Vision for Change

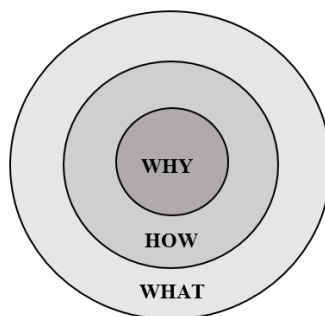
Central to any vision for change is exploration of the question *why*. Sinek (2011) reminds us that change of any significance begins with *why* and that “people don’t buy what you do; they buy why you do it” (Sinek, 2009, 3:52). Echoing this sentiment, Frontier and Rickabaugh (2015) focus on four elements central to genuine change: why, how, where, and who. They note that “being clear about *why* is essential; the answer becomes the premise for the other three questions” (Frontier & Rickabaugh, 2015, Unpacking the Questions section, para. 1).

The Why

Not surprisingly, considering its importance, Sinek (2011) places the *why* at the centre of the Golden Circle. Governed by the emotion-driven limbic system, working from the inside out, the *why* is what will propel people forward and keep them moving when change proves difficult.

Figure 2

The Golden Circle



Note. Adapted from *Start with Why* (p. 37), by S. Sinek, 2011, Portfolio.

The leadership-focused *why* for this OIP manifests in the opportunity and outcome gap for students in RRDSB who present with chronic challenging behaviours. It requires us to recognize education’s *why* as greater than academic development. It is human development (Bailey, 2015; Tranter et al., 2018; Weiner, 2003). The formal exclusion from learning of

students with interfering behaviours illustrates a disproportionate rate of exclusions applied to males and students with special needs (Ontario Ministry of Education, 2014b). The data also suggests a greater impact on students from economically disadvantaged families (RRDSB, 2019a; Skiba et al., 2014) and ethnic minorities (Skiba et al., 2011). Chin et al. (2012) and Sharkey and Fenning (2012) note that exclusionary practices can result in a freefall into patterns of increasingly more challenging behaviours. Missed opportunities for learning can result in alienation from peers and school community, and reduced motivation toward academic goals (Michail, 2011). Students who demonstrate dysregulated or resistant behaviours do not experience unconditional positive regard—valuing the student despite the behaviour—and the educator-student attachment suffers (Brunzell et al., 2019; Rogers, 1961).

The Ministry lens reflects the fact that this task is more encompassing, more dynamic, more reciprocal, and more community-oriented, than a simple cause and effect approach to exclusionary and punitive consequences. It notes that in order for a school climate to be positive, all members of the school community must experience feelings of safety, inclusion and acceptance (Ontario Ministry of Education, 2018b). This vision stands in contrast to the current response to students who exhibit frequent challenging behaviours. Educators have an important role to play in the system and environment—the classroom ecosystem, that is contributing to the presentation of these behaviours (Lippard et al., 2018). This makes educator mindset and practice paramount to the change necessary. To educate for human development, the Board’s responsibility is to reframe behaviour support as a social justice issue requiring “a manifestation of ethics and practices that must first be humanizing” and “diametrically opposed to oppressive forces and mechanisms” (Smith, 2016, p. 77).

The What

Sinek (2011) positions the *what*, controlled by the rational neo-cortex that uses reason and data, in the furthest ring of his Golden Circle. The *what* in this OIP includes the consideration of relationships—the proximal process that govern child development (Lippard et al., 2018), and the connections between individuals and their environments. Pivotal to this leadership-focused vision, it speaks directly to change drivers and priorities for change.

An educator shift from *additive thinking* where the student and the environment function independently of one another, to *interactive thinking* where environmental conditions “produce different developmental consequences depending on the personal characteristics of individuals living in that environment” (Bronfenbrenner, 1989, p. 192), will be a shift in thinking for educators. Bronfenbrenner’s (1977) ecological systems theory posits that a child is affected by all of the systems they inhabit and the relationships between those systems; “environmental structures, and the processes taking place within and between them, must be viewed as interdependent and must be analyzed in systems terms” (p. 518; see Appendix A for a graphic representation). More specifically, Bronfenbrenner (1989) references ecological niches, “regions in the environment that are especially favorable or unfavorable to the development of individuals with particular personal characteristics” (p. 194). This interplay of biological and environmental factors contributes to what Bronfenbrenner terms synergism (Bronfenbrenner, 1989). Related to education, the effects of a child’s individual characteristics when combined with those characteristics of the primary educator and the classroom can result in an effect that is greater than the sum of the parts. Taylor and Gebre (2016) point to temperament as an example of a predisposed, salient feature that can result in personalized contexts. Bronfenbrenner (1989) notes that cognitive capacity—a scientific feature, and temperament and

personality—socio-emotional and motivational characteristics, are responsive to environmental forces. He deepened his connection to cognitive capacity by including reference to Vygotsky's (1929) intracultural framework with the appreciation that individuals develop competency in tasks that are culturally-oriented and contextually-based and to which they have multiple exposures—cognitive competency. Regarding nature and nurture, Bronfenbrenner and Ceci (1994) posited a dynamic bioecological model wherein the distinctive characteristics of an individual's temperament are likely to change and be modified by the environmental responses they encounter. Bronfenbrenner (1989) notes that individual personality is continuous across place and time and predictable in that an individual varies their behaviour as a function of a situation. Greene (2016) would call this propensity adaptability and would suggest that challenging behaviours occur “when the demands being placed on a kid exceed the kid's capacity to respond adaptively” (p. 20). All students perform best in, and require exposure to, environments that build cognitive competency, support regulation, and foster relationships (Brunzel et al., 2016, 2019). Educators need to act based on their role in a child's dynamic ecology. Only then can educators meet the goal of human development (Tranter et al., 2018) in a socially just manner (Smith, 2016; Weiner, 2003).

There are many reciprocal relationships in a child's immediate microsystem. Termed proximal processes, these dynamic interactions influence learning and behaviour, in effect actualizing genetic potentials (Bronfenbrenner & Ceci, 1994). Bronfenbrenner (1989) updated his original definition of a microsystem to include the importance of the developmentally relevant attributes of those people around and participating in the environment of the child. This makes clear the impact of others and consideration of their presentation to the student. The construct of belief systems also appears in Bronfenbrenner's (1989) revised definition of a

macrosystem, noting that systems are shaped by the culture or sub-culture and change over time and space. In broad terms, macrosystems include variables such as: social class, ethnicity, demographics, lifestyle, family values, and family construct. Recognizing culture and sub-culture draws into question assumptions made in schools regarding shared understandings among students and hints at a hidden curriculum. These ways that culture expresses itself in classrooms may contribute to subtleties of power, privilege and bias (Aragona-Young, 2017; Shields, 2010). Shields (2018) asks us to check the privilege of the norms in Western education and the continued subscription to “the dominant Eurocentric perspectives and assumptions” (p. ix). She notes that as long as schools operate with this middle-class knowledge perspective, then some students will begin school already having the foundation to build relationships, understand the material, and behave according to the expectations (Shields, 2018). Bailey (2015) terms this reality *family privilege*. These elements remind us again of the social justice framework of this OIP and the need to lead for change with this in mind (Ryan, 2010).

Acknowledging the bi-directional nature of relationships means that learning of any kind, including behavioural learning, develops in a reciprocal way (Berry & O’Connor, 2010). Events and experiences in a child’s microsystem, and secondarily in their mesosystem, colour their perceptions of the world, which can influence their responses. In keeping with Green’s (2017) discussion of community equity literacy, consideration of the mesosystem is an important part of personalizing learning experiences for students. In a contributory fashion, Epstein’s (1995) overlapping spheres of influence theory illustrates the importance of considering the child's extended home environment as a true partnership through an asset-based, appreciative inquiry lens. When our lenses see separate and disconnected spheres of influence, our work comes from a place of division and blame. Epstein (1995) illustrates this when she notes that,

[i]n some schools, there are still educators who say, “If the family would just do its job, we could do our job.” And there are still families who say, “I raised this child; now it’s your job to educate her.” (p. 702)

The educator-student relationship, which is within the child’s microsystem and within the educator’s sphere of influence, is central to the child’s school experience.

It is clear that the *what* at the heart of the vision for change includes the *who*—those individuals who engage with students, especially the educators in their closest spheres of influence. These individuals form the systems and include the stakeholders who can create the change. The *what* to change is the understanding of behaviour, to use culturally-literate, but more accurately, equity-literate (Gorski, 2016; Gorski & Swalwell, 2015; Ladson-Billings, 2006) lenses and consider critically what it is that we do *to* students, instead of *with* students, when we engage in their microsystems (Wachtel, 1999). Considering the larger systems at work is foundational to transformative leadership with a social justice focus (Gorski, 2016; Gorski & Swalwell, 2015; Shields, 2018).

The How

Finally, in consideration of *how*, a transformative approach must action the tenets put forth by Shields (2018) through courageous dialogue and decision making that challenges the status quo. Recalling Sinek’s (2011) Golden Circle, *how* is in the middle, governed by the limbic system that operates on feelings. If people are inspired by the *why*, and understand the *what*, and if the *how* provides circles of safety that foster the development of a deep sense of trust and cooperation, then meaningful change can happen (Sinek, 2011). The circles of safety that Sinek references remind us that individuals need safe holding spaces while managing change (Heifetz, 2006; Heifetz et al., 2009)—a key feature of adaptive leadership. Simultaneously, change

recipients need and want authentic leaders who can be trusted to lead them through change (Avolio et al., 2004; Tschannen-Moran & Hoy, 2000). This makes adaptive, authentic leadership imperative for this transformative leadership challenge.

Organizational Change Readiness

The first step in planning for change is to consider the change readiness of the organization. Of note, and instrumental to my OIP, is the recognition that there exists both organizational readiness for change and individual readiness for change (Cawsey et al., 2016; Combe, 2014; Whelan-Berry and Somerville, 2010). Readiness is comprised of two components: perception of the need for change, and acceptance of it (Cawsey et al., 2016). Both the organization itself and the individuals in it need to recognize and accept the need for it. If the readiness of the organization is not in harmony with the readiness of the individuals, or if not all individuals are equally ready, large-scale change will be problematic. The ability to unfreeze from old habits (Hussain et al., 2018) can depend on whether people believe they must change because a crisis is near and disaster is imminent (Cawsey et al., 2016).

Does a Crisis Exist?

To determine whether the change readiness condition of a perceived crisis has been met, it is important to examine the level of problem recognition across stakeholders in education broadly, and specifically within the RRDSB system. Provincially, recent data from Ontario schools indicates that frontline educators are expressing a high degree of concern regarding opposition, defiance, verbal hostility, and physical aggression (Santor et al., 2019). They feel unsafe in their roles, unsupported by leadership, and ill-equipped to manage escalating classroom behaviours. The Ontario government's increase in funding for student mental wellness (Service Ontario, 2020) and decrease in the latitude around discretionary suspensions for grades K-3

(Government of Ontario, 2020) demonstrates a recognition of the precarious nature of student mental health and the high value placed on student well-being and the social-emotional learning.

At a local level, RRDSB's educator contextual data (RRDSB, 2018b, 2019b) illustrate the fact that educators feel ill-prepared and ineffective when faced with negative classroom behaviour. Their practice of passing off the support of students presenting with challenging behaviours to administrators and SSCs confirms this. Parents and community members recognize increasing behaviour negativity in classrooms and the related concerns this brings for peers, for educators, and for classroom climate (Soliman et al., 2018). Students themselves express feeling unsafe at school (Jacobson et al., 2011; Mitchell & Bradshaw, 2013; Thomas & Bierman, 2006) and this has been hypothesized to be a risk factor or, at minimum, associated with compromised mental wellness (Nijs et al., 2014). The case for a crisis—awareness of an imminent danger, is clear.

Are We Ready?

Cawsey et al. (2016) highlight a number of factors that signal an organization's change readiness, including the "previous change experiences of its members; the flexibility and adaptability of the organizational culture; the openness, commitment, and involvement of leadership in preparing the organization for change; and the member confidence in the leadership" (p 106). Cawsey et al.'s (2016) readiness scale, adapted from the work of Stewart (1994), Holt (2002), and Judge et al. (2009), highlights strengths for promoting change readiness and needs that inhibit change readiness. This can be applied to RRDSB.

On the dimension of previous change experiences, RRDSB has the benefit of positive institutional memory around its previous changes to the Special Education Department. Executive support has a history of being strong, especially in the face of change as evidenced by

the approach during the COVID-19 school closures and re-openings. Staff feel confident reaching out to senior management to share ideas or request support with new learning. The culture is innovative and supportive. This may have contributed to one of the problematic factors plaguing the Board's fragmented approach to behaviour support. Historically, schools have been able to pursue multiple avenues, programs, and philosophies that were meaningful to them. While senior management wanted to encourage school autonomy, this pursuit of varied options has resulted in a disjointed puzzle of approaches whose efficacy has not been accountably managed. RRDSB, as an organization, clearly possesses many strengths that signify its ability to be considered organizationally change ready.

Holt et al. (2007) posit three criteria for staff change readiness: they can do the learning, they consider it the right learning, and they feel that change is needed. Contextual evidence from pilot learning projects (RRDSB, 2018a, 2019a) in two RRDSB schools demonstrate that based on Holt et al.'s (2007) scale, these criteria have been met. Feedback from staff indicates a desire to continue learning, and a willingness to explore necessary changes in staff approaches to students with challenging behaviours—with the support of the Board. Their final caveat—with support of the Board—points directly at Holt et al.'s (2007) fourth criteria: leaders are committed. Staff was very clear when the pilot learning project ended that without this commitment from the top down, without the allocation of the time for collaboration required, they were not willing to commit their energy and their hard work to something that was not valued by management (Philpott & Oates, 2017). If the actions of senior executive staff are not congruent with the vision and the needs of those making the change, they will quickly discount the entire change plan as inauthentic (Lipton, 1996).

Combe's (2014) Change Readiness Inventory offers a change life cycle framework that would be beneficial to apply to RRDSB. She offers three main drivers that are instrumental in determining readiness: cultural readiness, commitment readiness, and capacity readiness (Combe, 2014). RRDSB possesses the capacity for the change but it will require attention in several areas (see Appendix B for visual with prompt queries). Knowledge and skill building will be required to address the change plan. In keeping with an adaptive leadership focus that recognizes technical and adaptive challenges (Heifetz et al., 2009), some employee roles and boundaries will change to meet the technical application through an organizational blueprint. Regarding the adaptive elements of the change, concepts and ideas will require deep exploration with a willingness to adjust mindsets. The commitment for change will be strong for some, with more support and coaching required for others. The change fits the ethical expectations of the organization, as stakeholders will be invited to participate in planning and executing the change plan. Belief in the value of a social justice framework may not be present for all individuals, but the work around including this in the organization's cultural expectations will build commitment. This final and key focus for Combe's (2014) change readiness tool—culture, will be especially salient. Emerging from recent contract negotiations and COVID-19 fatigue, trust must be nurtured. The spirit of collaboration that has been strong in the Board based on its history of openness through solicited reviews and information gathering opportunities, will be tapped.

The culture at RRDSB could be considered primed for positive change. The Board's own Special Education Review (RRDSB, 2019b) conducted by an outside consulting firm clearly indicates that educators feel frustrated and ineffective when dealing with the challenging behaviours of students. The report noted that educators do not feel equipped to support the many

needs of children who struggle with social and behavioural expectations. Without their own set of skills, they rely on administrators or SSCs to intervene, remove, exclude, isolate, or suspend these students so they can teach (RRDSB, 2019b). Students expressed feeling that the current practices of exclusionary responses do not help them learn coping strategies or support their learning needs (RRDSB, 2019b). There are repeated references throughout the report to the need for student voice, collaboration, a team approach, and parent involvement. In conclusion, the report highlights the fact that it is unclear how mental health resources and special education services intersect, and how new practices with measures for accountability could be provided (RRDSB, 2019b). These questions, generated by the Special Education Review (RRDSB, 2019b), will be critical to the work. The need for change resides at the bottom. The power to support the change rests at the top.

In summary, the PoP serviced by this OIP is located in the geographically expansive RRDSB and is situated within a social justice theoretical framework. Conceptually, the problem is observed through a bioecological systems lens, calling into focus the mindset and practices of the educators across the Board who support students with challenging behaviours. The leadership position combines authentic, adaptive, and transformative styles informed from the writer's own journey from follower to leader, and based on the agency of a seconded position to make recommendations and lead the learning for this change project. RRDSB possesses many elements of the change readiness features required for positive individual and organizational change. This sets the stage for planning and development in Chapter 2.

Chapter 2: Planning and Development

With the clear understanding of the PoP developed in Chapter 1, this chapter will highlight the importance of aligning a change plan with my leadership lens. In keeping with the social justice impact of my PoP, a transformative leadership approach that is relationship-based and authentic will be explored. Adaptive leadership will be added to manage both technical and adaptive elements of the change. Three frameworks for change will be examined, and the best fit will be presented as a combination of two approaches. Nadler and Tushman's (1989) Congruence Model will be utilized to complete an organizational analysis. Attention will be given to the fit between that analysis, the change model, and my leadership approach. Finally, a brief review of foundational research will identify the non-negotiable elements required for a chosen solution to this PoP. Measured against these non-negotiables, a solution will be identified that best utilizes my leadership to address this PoP.

Leadership Approaches to Change

The best-fit leadership approach for this PoP is a transformative one. In addition to transformative leadership, what makes the OIP more than a lofty vision, is the detailed planning that can arise through an adaptive approach. Recognition of both technical and adaptive issues is necessary for success (Heifetz et al., 2009). The element woven through all of this is the authentic nature of the leadership. There needs to be an authentic invitation to educators and students who may not have felt heard previously (Shields, 2018). Stakeholders need to believe they can trust in order to be vulnerable and open to the work. Viewed in its entirety, the leadership approach is a transformative one that starts at the end, with a social justice vision (Brunzell et al, 2016, 2019; Craig, 2016; King & Travers, 2017), managed by adaptive responsiveness, and made meaningful and safe by authentic leadership.

The inequity illustrated by a supportive, inclusive response for students with academic needs compared to a punitive, exclusionary response for students with behaviour challenges presents a social justice conflict. Sapon-Shevin (2003) reminds us that exclusionary practices are tied not only to the familiar categories of class, race, gender, and sexual orientation. She expands the argument to note that

exclusion ... is not about race or language or gender—or any other difference. Rather, the culture of exclusion posits that isolating and marginalizing the stranger, the outlier, is appropriate, acceptable, and sometimes even laudatory. Exclusion is not about difference; it is about our responses to difference. (p. 26)

The social justice nature of the PoP requires a leadership framework that incorporates a transformative response (King & Travers, 2017; Shields, 2018).

Transformative leadership addresses social justice and equity, simultaneously. Shields (2018) suggests that the approach is a way to consider “the material realities, disparities, and unfulfilled promises of the world in which our students live, and of working to ensure more equitable, inclusive, and socially just opportunities for all” (p. 5). Tied specifically to principal leadership, Theoharis (2007) posits that social justice leadership focuses on recognizing, labelling, and eliminating marginalization in schools in active ways. The classroom ecosystem needs to be a key focus. King and Travers (2017) examine transformative leadership for social justice through an ecological lens noting that respect, high expectations, and humility in service to student and community are needed to foster change.

If transformative leadership is the overarching umbrella, what are the instructive leadership mechanisms that are at work under the umbrella? What are leaders actually tasked with doing? A transformative leadership focus must be felt at the general, accessible to all, Tier 1

(Ontario Ministry of Education, 2013a) of service delivery. Employing the ecological systems conceptual model, Tier 1 supports are valuable because they are universal and target the child's school microsystem. By extension, transformative leadership for social justice synergistically enriches the interactions between school, home and community—the mesosystems for students (King & Travers, 2017). Adaptive and authentic leadership approaches, in combination with transformative leadership provide the mechanisms required to action the social justice values.

With its recognition of conditions that require customized solutions, adaptive leadership respects what Shields (2018) terms VUCA—the “volatile, uncertain, complex, and ambiguous” (p. 4) aspects of today's world. Shields (2018) likens technical solutions to adaptive crises as no different than “rearranging the deck chairs on the Titanic” (p. 10). While they may be a part of the details of the plan, the successful approach itself must be adaptive, informed by collaboration and the authentic practice of giving voice to values (Gentile, 2017) for educators, students, and community. Adaptive challenges are difficult to define, multi-layered, and require leadership that will be “courting resistance by stirring the pot, upsetting the status quo, and creating disequilibrium” (Heifetz et al., 2009). The view from the balcony that adaptive leadership requires (Heifetz et al., 2009, p. 32) is essential to determine the structures, the culture, and the defaults that exist and perpetuate this. From the balcony, we see the technical solutions that have not worked, including suspensions, exclusions from class, deficit lens reporting to parents, contingent rewards, extrinsic punishments, and removal of privileges. This informs decision making regarding existing practices worth conserving, those to be discarded, and those to be developed. The reflection on and critical redefining of accepted views regarding student behaviour will unbalance stakeholders. Heifetz et al. (2009) tell us that people do not resist change, rather they resist the loss that accompanies any change. In adaptive challenges, the

problem lies not with the practices themselves, but with the people who have shaped them.

Although this appears daunting, the good news is that “because the problem lies in the people, the solution lies in them, too” (Heifetz et al., 2009, p. 74).

Herein is found the value of authentic leadership. It requires us to call out the gap between explicit and implicit cultural values and goals espoused by RRDSB and reality. If the Board believes that behaviour is communication (Ontario Ministry of Education, 2010, 2013a), that practices that value inclusion, well-being, and equity are essential (RRDSB, 2015, 2017a, 2017b, 2020a), that student voice and choice are valued (RRDSB, 2020a), and that we use investigative practices and data to inform our work with struggling students (Ontario Ministry of Education, 2017), then our perception of and response to students with chronic challenging behaviours must change. If our actions are out of sync with this, then our printed words are meaningless. Heifetz et al. (2009) call this the “song beneath the words” (p. 76) and it can cut both ways. We as leaders need to listen for the song beneath the words, and know that our staff has already figured out the song beneath *our* words. If they don’t match, we can expect more of the same—lip service but no change.

As noted in the discussion of her eight tenets, Shields (2018) calls upon leaders to demonstrate moral courage to evaluate practices through a social equity lens. Several of the eight tenets are at the forefront of this OIP (see Appendix C for an examination of all tenets applied to the OIP). One of these is the act of “deconstruct[ing] knowledge frameworks that perpetrate inequity and reconstruct[ing] more equitable knowledge frameworks” (Shields, 2018, p. 22). Included in this, Shields notes that deficit *blame the victim* thinking needs to be replaced with a belief that all students are capable and can be engaged (Shields, 2018). She talks about the duty of every educator to “help children overcome the limitations of their home situations—

limitations that the children have not created and for which they are not responsible” (Shields, 2018, p. 41). Removing deficit thinking and replacing it with an equity lens makes it every educator’s responsibility to “reach and teach” (Shields, 2018, p. 42) all children. The faulty knowledge construction that uses blame to abdicate educator responsibility has to be reconstructed to create a new knowledge framework that removes deficit thinking in favour of a lens that considers the culture of power (Weiner, 2003). It will require courageous conversations to reconstruct knowledge so educators, as members of the culture with the power, can recognize their role to stand with our students and families who are marginalized (Shields, 2010, 2018; Weiner, 2003) in order to secure equitable change. Transformative leadership is not without its challenges. Staff members, parents, and students who have unwittingly benefitted from the current reality will be resistant to reconsider the historical status quo.

In order for the results of transformative leadership in this PoP to be felt throughout a student’s microsystem, adaptive leadership is required to define the challenges, step away to see what needs to change, and give people a safe space while they do the critical, reflective work necessary. The preliminary work is positioned in microsystems. These will influence larger mesosystems—one microsystem engaging with another. In order to influence and create change to relationships within microsystems, stakeholders’ thoughts, ideas, and concerns need a voice. It is recognized that the adaptive, transformative changes in this PoP require a trust relationship with leadership which is well promoted by an authentic leadership style.

Framework for Leading the Change Process

Since children exist in an ecosystem, suitable change models must reflect this. Dating back to Hobbs’ (1983) work with Re-ED schools, he believed that children’s behaviour had to be

approached in ecological terms. He suggested an adaptive response; a re-thinking of models that suggest that the difficulty exists within the child. Instead, he asserted that

the problem is to be discovered not in the child but in the transactions between the child and the people who play crucial roles in his life. The emphasis is on the way members of the ecosystem behave and the way they expect themselves and other members of the ecosystem to behave.” (Hobbs, 1983, p. 17)

This change is a perceptual one that involves new learning and new practices for schools, in conjunction with home and community. Hobbs (1983) declared that parents “are no longer viewed as sources of contagion but as responsible collaborators in making the system work” (p. 20).

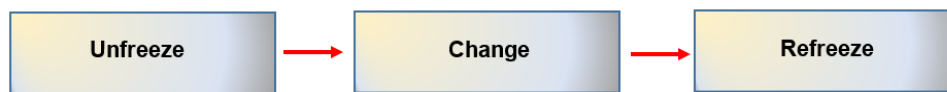
A change such as this requires a model that focuses on educators aimed at reshaping perceptions—an uncomfortable and vulnerable process. The model must address realigning belief systems—“kids do well if they can” (Greene, 2016, p. 5); and, behavioural norms—educators do not punish and exclude, they support (Craig, 2016). Considering the significant reflective work involved, it must be change that happens over a considerable period of time with support throughout the process. Due to the transformative impact on frontline workers, adequate mentoring and coaching that responds to the specific needs of individual staff members, wherever they may find themselves on the change trajectory, is necessary. The change model must manage system change and individual change. Finally, the change process must be congruent with non-linear change—the kind that arises when adaptive work is being done through an authentic leadership lens.

Analysis of Models

Lewin's (1947) Stage Theory of Change is a prescriptive model based on three stages: unfreezing, changing, and refreezing (Kaminski, 2011). Unfreezing utilizes data to awaken the system to the fact that the status quo, or the equilibrium that exists, is no longer sustainable (Cawsey et al., 2016). Schein (1996) suggests that data can disconfirm individual's hopes and expectations, and disrupt the equilibrium of the current situation. The disequilibrium can result in learner anxiety and should be met with attempts to create psychological safety. These holding areas of psychological safety are key elements referenced by Heifetz et al. (2009) in the adaptive leadership model adopted in this OIP. The Change stage is the period wherein individuals in the system adopt and action new responses and approaches (Sarayreh et al., 2013). Refreezing ensures that the introduced processes and outlooks become the new way of doing business. Since the system shifts from balance to disequilibrium, the goal is to return it to a new state of homeostasis (Sarayreh et al., 2013). Frequent monitoring and consistent encouragement are required to ensure that individuals do not return to old habits.

Figure 3

Lewin's Stage Theory of Change



Note. Adapted from “Unfreeze Change in Three Steps: Rethinking Kurt Lewin’s Legacy for Change Management,” by S. Cummings, T. Bridgman, and K. Brown, 2015, *Human Relations*, 69(1), p. 34 (<https://doi.org/10.1177/0018726715577707>).

A model more focused on the feedback and emotions of change recipients is the Concerns Based Adoption Model (CBAM) based on the work of Hord et al. (2013). This model considers change as grounded in the core beliefs listed below:

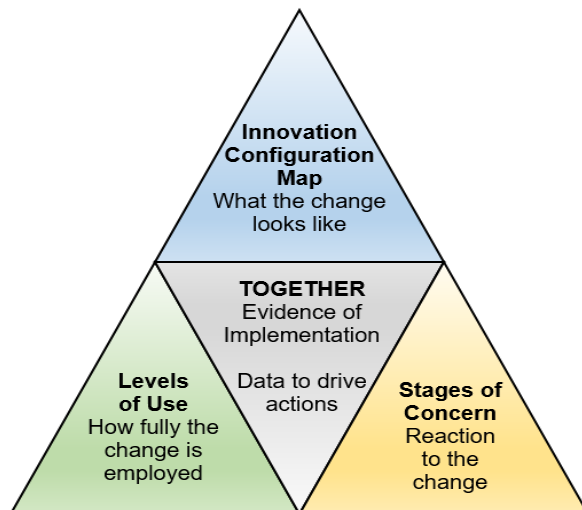
- All change is based on learning and improvement is based on change.

- Implemented change has a greater success when it is guided through social interaction.
- Individuals have to change before the school can change.
- Change has an effect on the emotional and behavioral dimensions of humans.
- People will more readily choose to change when they foresee how an innovation will enhance their work.
- A change leader's role is to facilitate the conversations that invite others to own the desired change. (Hord et al., 2013, p. 4)

This model uses Innovation Configuration Maps to clearly operationalize the essential components of the change to ensure everyone is instituting the change similarly (Hollingshead, 2009). In addition, the behaviour indicators for the Levels of Use Tool of this model provide a way to measure intensity of implementation (Hollingshead, 2009). These levels can be represented in a variety of ways and range from ratings of non-use to ratings of advanced use (Hollingshead, 2009). Using a scale based on beliefs and attitudes, the CBAM's Stages of Concern Scale provides a framework to better understand change recipients' engagement with the change process (Hord et al., 2013). This informs personalized next steps that are best suited to moving the learning forward for individuals and even for groups whose members are at similar stages (Khoboli & O'Toole, 2012). The change facilitator's (CF) role is to be responsive to the personal needs of participants and respond appropriately based on their position on the Levels of Use and Stages of Concern tools (Hollingshead, 2009; Hord et al., 2013).

Figure 4

Hord et al.'s (1987) Concerns Based Adoption Model of Change



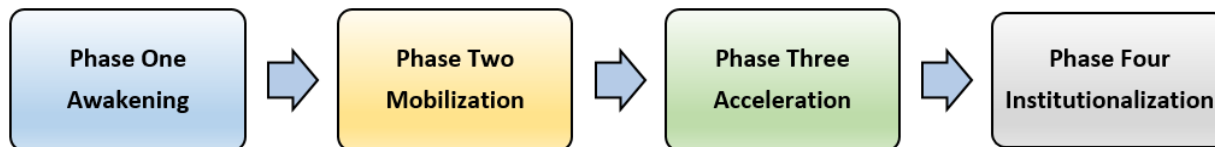
Note. Adapted from *Concerns Based Adoption Model*, American Institutes for Research, 2021, (<https://sedl.org/cbam/>).

The Cawsey et al. (2016) Change Path Model places attention on an analysis at the system level and the emotionality of the stakeholders experiencing the change. The Awakening phase focuses on what needs to change and the development of a vision. Participation is encouraged, communication channels are opened, and a gap analysis is performed (Cawsey et al., 2016). The *why* and the *what* are developed through a detailed examination of: formal systems, structures and processes; power and culture dynamics; stakeholder and recipient voices; and agents of change themselves (Cawsey et al., 2016). In the Mobilization stage, formal and informal structures are leveraged in service of the change (Cawsey et al., 2016). The CBAM's support structures and clear communication engage recipients and stakeholders while respecting the existing hierarchical culture. The change agent's leadership theory and benefits of the vision are heavily relied upon here (Cawsey et al., 2016). The Acceleration phase involves empowering and engaging others in supporting the detailed action plan informed by data. Necessary tools, skills, knowledge, ability, and thinking patterns are considered with an appreciation that the change may not be linear (Cawsey et al., 2016). Change agents are called upon to be adaptable,

to expect the unexpected, and to celebrate the wins—both large and small. Finally, Institutionalization with its balanced monitoring processes and measurement of needs ensures stability for the realized change (Cawsey et al., 2016).

Figure 5

Cawsey et al. (2016) Change Path Model



Note. Adapted from *Organizational Change: An Action-Oriented Toolkit* (3rd ed., p. 55), by T. F. Cawsey, G. Deszca, and C. Ingols, 2016, Sage.

Best Fit Model

The most significant strength of Lewin's (1947) Stage Theory is the focus on Unfreezing—the recognition that change cannot begin if the system remains stable. This aligns well with the PoP. However, beyond that, Lewin's model appears too linear. It should be noted that Cummings et al. (2015) argue that Lewin's model was never meant to be a static, simplistic, diagrammatic entity. They argue that his model has been oversimplified since his death and is actually extremely responsive and flexible (Cummings et al., 2015). In fact, Bronfenbrenner's ecosystem's theory was heavily influenced by Lewin's original behaviour equation (Bronfenbrenner, 1989). Regardless, the commonly interpreted version seems to rely heavily on top-down leadership without sufficient space for change recipient voices. The authentic leadership approach in this OIP requires a focus on reciprocal sharing (Avolio et al., 2004). In addition, Lewin's model does not allow for deep digging into the nature of the adaptive or technical organizational gaps required for an adaptive leadership approach (Heifetz et al., 2009). It does not place enough emphasis on the difficult process of moving individuals beyond ways of

feeling, perceiving, and believing that have been comfortable for a long time. It seems unrealistic that resisters will be easily moved with encouragement and external motivation. The transformative leadership work of this OIP, with its focus on deconstructing and reconstructing perceived notions of power, requires an emphasis on moving away from ideas that have historically been the norm (Shields, 2010, 2018; Weiner, 2003).

Hord et al.'s (1987, 2013) CBAM is specifically designed for schools which makes it a natural fit. As well, the expectation that implementation takes considerable time—years potentially—to be realized, aligns with the implementation plan for this OIP. The CBAM most closely matches the relational elements of the PoP. It is especially well suited to educator professional learning and mentor coaching approaches (Khoboli & O'Toole, 2012). The elements of this model that suggest that individuals reflect and move through stages of emotional concern is in keeping with the work of the authentic school leader—“messy and substantially non-linear...dynamic, complex, inter-connected and collegial” (Duignan, 2014, p. 164). Mindset change and change to practice are well addressed by this model for projects where change is executed mainly through the individuals. This matches a transformative leadership approach with its focus on mindset shifts and the necessary change in practice that must coincide with these shifts (Shields, 2018). However, it lacks reliance on a robust organizational and gap analysis to support complex systemic change planning. The overarching emphasis on individual change neglects the fact that processes and policies of the organization must be considered. Without a deep look at all elements—system and personal—a complete picture of change types, adaptive or technical, would not be available (Heifetz et al., 2009). CBAM is a tool that is most effective when used to move individuals through a change plan that has been developed through a more robust change model.

The Cawsey et al. (2016) Change Path Model's Awakening stage, while similar to Lewin's (1947) Unfreezing, places greater onus on leadership to fully understand the external and internal organizational forces at play. This more detailed Unfreezing that focuses on the gap analysis, vision, and early communication for buy-in, gives it a strong launch. Its gap analysis gathers useful information to inform the more complete vision that adaptive leadership requires (Heifetz et al., 2009). The Cawsey et al. (2016) model incorporates emphasis on participant voices through communication, support, and monitoring. This connection meshes well with authentic leadership (Kiehne, 2017). A focus on organizational culture recognizes the importance of cultural artifacts like values, norms, language systems, symbols, rituals, ceremonies, and physical elements in organizational change (Higgins & McAllaster, 2004). A cultural focus is important to an OIP grounded in social justice theory where transformative leadership reflects on inequitable practices (Shields, 2018). The model's non-linear presentation with reference to tools, skills and thinking patterns is in keeping with a change that is belief-based as well as skill-based and addressed through adaptive leadership (Heifetz et al., 2009). The method of building incrementally—Mobilization to Acceleration to Institutionalization—allows modifications based on successes and challenges at each phase of growth (Cawsey et al., 2016).

For this PoP, the Cawsey et al. (2016) Change Path Model holds the greatest promise. Its gap analysis offers a more comprehensive examination of the organization than Lewin's (1947) Stage Theory or Hord et al.'s (1987) CBAM. It focuses on investigation, vision and a global blueprint for the proposed change (Cawsey et al., 2016). The inclusion of participatory change recipient voices in the Change Path Model is important in this PoP as the work involves relationships and inclusion of stakeholder voices. With this OIP's theoretical grounding in a social justice focus, a change model that examines cultural dynamics and values cultural artifacts

is appropriate. However, it does not feature as strong a means of informing the next steps in response to change recipient's emotions when compared to the CBAM (Hord et al., 1987). Hord et al.'s (1987) CBAM will be added to supplement the Cawsey et al. (2016) Change Path Model. With its consideration of the participant's emotional journey using its Stages of Concern Scale, the clarity around implementation actions through Innovation Configuration Maps, and the qualitative evaluation of change implementation rigour through its Levels of Use Tool, the CBAM (Hord et al., 1987) strengthens the Change Path Model (Cawsey et al., 2016).

Critical Organizational Analysis

An open systems approach acknowledges that organizations exist and interact with their environments in intricate and active ways (Cawsey et al., 2016) that are not linear. When the system finds balance, the goal of a system is to remain at equilibrium which is why systems at equilibrium are not changeable without the application of considerable energy (Nadler & Tushman, 1980). Within the system are individuals whose views about that system are different from person to person. Just as Bronfenbrenner's (1989) ecosystems theory tells us to view human development in terms of an individual's interconnected and interdependent ecosystems, the events and conditions that occur within an organization cannot be viewed in isolation.

Congruence Model

Nadler and Tushman's (1989) Congruence Model can be used to analyze the harmony between system elements in order to determine effectiveness (see Appendix D for a graphic specific to this OIP). The model divides the internal workings of the organization into four areas while considering the environmental inputs and the strategy to transform those inputs into the output produced. The most important dynamic at play among the components is congruence.

Internal consistency among the four components combined with an organizational strategy that is in sync with the environmental elements creates the greatest likelihood of efficacy.

Input

Nadler and Tushman (1989) identify inputs as the initial elements in the model. The inputs include environment—political, economic, social, technological and ecological; resources—time, money, personnel; and historical culture—the evolved mission, principles and approach to how the organization manages itself. In their 1980 work, Nadler and Tushman identified a fourth “derivative” (p. 43) input—strategy. Inputs can be viewed as prospects or limitations, positives or negatives.

Environment. The environment at RRDSB is rural, but quickly expanding with movement away from cities to its outlying areas as infrastructure makes this more attractive. The cost of homes outside of major cities draws families looking for lower priced options. In addition, select areas of the county have significant subsidized housing availability, which can cluster financial instability within specific schools. The Board’s previous special education vision of inclusion still exists, but is being challenged by a French Immersion vision that has a tendency to create streams of advantage simultaneous to the provincial government’s mandate to discontinue grade nine streaming to applied or academic math programs (Wilson, 2020). Streaming practices are being credited with creating pockets of disadvantage that often reflect negatively on racialized and socioeconomically marginalized families (Government of Ontario, 2020). French Immersion schools are beginning to experience core classrooms with higher academic and behavioural needs (Alphonso, 2019; RRDSB, 2020b). Politically, the province’s Bill 197—the COVID-19 Economic Recovery Act (2020), has increased the focus on racial and

income inequality brought front and centre by the effect of COVID-19 on our financially-challenged, resource-poor, marginalized families (Garcia & Weiss, 2020).

Resources. The Board's direction is connected to funding from the province. This year's focus on mental health and racial inequity is a shift from prior province-wide priorities. New funding for social workers (SW) has not yet touched day-to-day practice in classrooms at RRDSB. Their roles are being solidified and their presence is felt mainly as a referral source for SSCs. Funding envelopes constrain the Board's resources when it comes to input. Although the money might be available, it is earmarked for designated provincial foci regardless of the urgent needs the Board may be facing. Similarly, the Board has limited control over managing the human resources in its buildings. Seniority-based staffing practices and strict transfer protocols do not allow administrators to staff a building with individuals who may be best qualified to support pockets with high behaviour needs. The Board, to this point, has been unable to support schools with these needs by redeploying, reorganizing, or reconfiguring their best trained staff or those highly motivated to support in the area of behaviour. Clearly, the provincial government also recognizes some of these human resource limitations and has struck Regulation 274 (CBC News, 2020) that controls hiring decisions for school boards. Another constraint, school budgeting formulas, provide staff to buildings based on a numerical equation regardless of the concentrated demographic or socioeconomic needs. Allocation of staff within buildings is at the discretion of administration, but constrained by class caps, qualifications, seniority, and union controls. Another area of numeric control is vice principal staffing to schools, usually with teaching components, based solely on school population. There is no consideration of the unique identities of the buildings, socioeconomic profiles or French Immersion offerings—which may create high needs core classes (Alphonso, 2019). This draws focus to this PoP as a social justice

type wherein the system, with its political constraints, is not easily able to allocate the required support to the students who need it most, resulting in a perpetuation of the inequitable status quo.

Historical Culture. The Board’s culture is one where distributed leadership is valued, as is community voice. Consultants and coaches work with educators to develop lessons and support academic needs for mainstreamed students and those with special education profiles. The culture in buildings has reflected considerable autonomy for educators without checks and balances in the area of behaviour management. Although aggressive incident reports and safe schools numbers are tracked, they do not correlate with an increase to student support. These numbers are managed by the Health and Safety Department and tracked by union partners. They are viewed through an employer lens, not a student lens. Culturally, academic instruction has been the responsibility of educators. Behaviour has been the responsibility of SSCs and administration. There is a wide variance and no system-wide consistency in tracking behaviour improvement in schools. While schools maintain their own records to inform next steps in progressive discipline, the data is not used in a problem-solving capacity with consideration of the student’s ecosystem. The historical culture of belief in most schools, by many educators, is that kids do well if they want to, and if they don’t do well, it’s because they don’t want to (Greene, 2014b; Levinsky, 2016). A new understanding needs to replace misbehaviour as willful—a shift that recognizes that “skills are the engine pulling the train; motivation is the caboose” (Greene, 2016, p. 23). Although there are many consultants and system-level support personnel who already understand this, and many of these concepts are embedded in the Board’s Behaviour Management Systems (2014) Training, these beliefs are not alive in classrooms.

The Transformation Process

The input mechanisms are transformed through work, formal organization, informal organization, and people. Strategy is employed to enable these elements to work together to meet the needs of the organization and produce the output that is required by the consumers—students, families, and the greater society. Nadler and Tushman’s (1989) concept of strategy refers to “the patterns of decisions that emerge over time about how resources will be deployed in response to environmental opportunities and threats” (p. 194). Strategic choices influence resource allocation decisions and program choices. They can involve deep data gathering or are sometimes simply a reflection of past actions. Strategy will feature heavily in the plan to address this PoP.

Work. The published and widely shared mission of RRDSB is to educate children to become socially and emotionally well developed, globally aware, academically capable contributors to our future (RRDSB, 2020a). However, there can be discrepancy in the understanding of the mission and the weight placed on each of the components. Currently, educators report that RRDSB has an academic focus for classroom educators and a social-emotional development focus for SSCs and administrators (RRDSB, 2019a). Due to the faulty cultural understanding that educators hold regarding challenging student behaviour, educators hang on to outdated behaviour modification strategies, exclusion, or punishment models to manage behaviour (RRDSB, 2019a). Despite the Board’s inclusive mission statement that defines the work as holistic, with academic success as only one element, educators may focus on this element at the expense of social-emotional development and global awareness. While students may be taught global citizenship in an abstract sense, this stands in contrast to the social justice reality for a group of marginalized students in their midst who do not experience

meaningful inclusion. This missing support means that these students are further marginalized and lose out while their more advantaged peers witness further examples of *othering* normalized in their school microenvironments (Kumashiro, 2000; Lesser, 2014; Levinsky, 2016).

Formal Organization. RRDSB has a hierarchical organization structure with an education side—charged with the day-to-day education of students, and a facilities side—those departments that manage the infrastructure of the schools and systems. The education side is comprised of a director, superintendents, system administrators, and school-based administrators. Departments manage program services and special education. Relatively newly created, are portfolios to address authentic learning and anti-racism. Coaches and consultants, through a distributed leadership model, are the bridge between departments and school-based educators. The professional learning that is provided and valued is targeted primarily at academic improvement with little focus on social-emotional learning. The newly introduced SWs and existing SSCs float somewhere between departments. Educators consider them the behaviour support required to enable the teacher to teach without disruption. The valuable Behaviour Management Systems (2014) Training for administrators, special education consultants, SSCs, and system-level providers is treated as stand-alone professional learning and is not provided to general educators, with the exception of those in the Kindergarten Program.

Informal Organization. Despite the Board mandates around inclusion, equity, and the importance of emotional well-being (RRDSB, 2020a), there exists a disconnect between the aspirational visioning developed at the system level and the watered-down version of its realization in schools. Educators see themselves as primarily responsible for academics. For our students with challenging behaviours, the academics is often a struggle because the behaviour gets in the way or because the behaviour is a symptom of a learning need. In addition, the

exciting opportunities classroom educators provide outside of the academics often represent less direction and structure meaning increased demand for executive functioning, emotional regulation, cognitive flexibility, communication, and social skills (Greene, 2014b). Greene (2016) reminds us that “challenging kids aren’t always challenging”; they’re challenging when “the demands and expectations being placed on them outstrip the skills they have to respond adaptively” (p. 7). Educators may believe they are creating positive experiences, but they are seeing these through the lenses of what is the norm for them and ignoring the oppressive nature and propensity for continued marginalization (Kumashiro, 2000) fostered by these ‘opportunities’. When students with challenging behaviours respond in challenging ways, educators fail to look at the interactive ecosystem—the intersection of marginalizing factors (Fisher et al., 2020), and the demands on the student that are overwhelming their coping abilities. Instead, they often believe that these children are “attention seeking, manipulative, unmotivated, coercive, and limit testing” raised by “passive, permissive, inconsistent, noncontingent disciplinarians” (Greene, 2016, p. 4). Greene reminds us that it “takes two to tango: a kid who’s lacking skills *and* an environment (teachers, parents, peers) that demands those skills” (Greene, 2014b, p. 15). The Board has been relatively silent on the effect of classroom environment. Consultants and coaches generally work in the realm of academic support, not behavior support and not classroom environment. There is limited reach to the positive messaging around the Board’s Behaviour Management Systems (2014) Training especially since it is presented outside of authentic classroom experience and is not provided to all staff. Consultants with understanding and expertise in social-emotional learning, student voice, and the value of relationships in the educational microsystem can only suggest and encourage. Unless administrators track, measure, and require a student-centred response from educators, faulty

perceptions will continue to allow for the exercise and acceptance of exclusionary, punitive responses.

People. The educators at RRDSB are trained to educate students using the latest techniques in inquiry, hands-on learning, technological pursuits, and multi-lingual richness. What they are not highly trained to do is understand, support, or program for students exhibiting challenging behaviours (Cameron & Sheppard, 2006; Clunies-Ross et al., 2008; Nash et al., 2016; RRDSB 2018a, 2019a, 2019b; Santor et al., 2019; Thompson & Webber, 2010; Westling, 2010). Administrators and SSCs are asked to support students with behaviours exhibited in environments they don't create or manage. SSCs respond reactively to events that are out of their sphere of influence. Administrators can neither supersede the union support of professional educator judgement, nor can they realistically change the daily happenings in the classrooms of children with challenging behaviours. The Board does not provide a focus or require accountability for educator practice and responsibility regarding social-emotional learning. This keeps skills in understanding, supporting, and planning for social-emotional learning at the bottom of educators' lists for growth and improvement.

Output

There is a gap between the current output and the desired output. The desired system output is a school experience that reflects an inclusive vision and includes a strong focus on student well-being in addition to providing academic skill development. The overall goal is human development—students who contribute positively to a challenging world (RRDSB, 2020a; Tranter et al., 2018). Research suggests that educator relationship and strategies for creating safe and inclusive learning spaces—critical to student emotional growth and mental well-being, are not prominently featured in school experiences (Baker et al., 2008; Johnson et al.,

2011). Students report leaving secondary school without the emotional resilience and feelings of safety and security necessary to face a challenging world (Fazari, 2015). In an equity-based environment, if well-being is a part of the vision statement, this is not being realized.

Congruence

There is a lack of congruence between the mission at RRDSB and the lived student experience. In addition to incongruence of outcome, there is incongruence of fit between components. The elements in the transformation process do not align. If the work is to educate children as whole human beings to contribute positively to our complex world (Tranter et al., 2018), educators have not been given direction on the entirety of the work. Previously, the focus was on students who could work and contribute to a factory-based economy (Rose, 2012). Now, the focus is on schooling in the 6 Cs for 21st century learning to support the future of our planet (Fullan & Langworthy, 2014). Embedded in these is character and citizenship, traits not easily learned in environments of *othering* (Kumashiro, 2000; Levinsky, 2016). The educators, who are individuals in the student's microsystems, do not have this rich understanding. The divide between the work at the system level and work at the school level is real. Administrators cannot bridge this instructional leadership divide in their extremely busy buildings. Schools reaching out to support marginalized populations impacted by retroactive and punitive behaviour practices need an administrative partner who can bring the system learning to the classroom environment. Due to the fact that unionized environments do not allow coaches and consultants to monitor and hold their peers accountable, new learning may not stick. Changes to leadership structures are required to manage this work accountably.

In order to change the system output, the work of the organization must be redefined to focus on education of the whole child that combines academic skills and social-emotional

learning, in service of a socially just world. Formal and informal structures need to reflect increased flexibility in roles and responsibilities so that it becomes everyone's task to support behaviour and well-being. By extension, deficit perceptions of student behaviour must be reframed and new skills and practices developed to better serve these students and families. This connects directly to the creation of my role as an administrator who can bridge expectations between the system and its schools and facilitate the accountable learning that can change educator responses at the classroom and school community level.

The Fit between Organizational Analysis, Change Model, and Leadership

The Change Path Model (Cawsey et al., 2016) will consider the external and internal data. The Awakening will require a willingness to see the reality in schools instead of a system-level view where it is assumed that the vision is percolating down to classrooms and the school experience for students. Leaders must “understand deeply what is going on inside their own organizations” (Cawsey et al., 2016, p. 53). This promotes an authentic leadership stance where every conversation can be focused on the vision with a *walk the talk* expectation that creates congruence and trust for followers (Avolio et al., 2004; Gardner et al., 2005; Weick, 1995). The Mobilization stage that relies on an analysis of structures, systems, processes, stakeholders, change agents, and the recipients of the change will incorporate the transformation component in the Nadler and Tushman (1989) Congruence Model. Strategy will be important. A transformative leadership approach that signifies a call to action with a social justice orientation will promote a focus on deep and equitable change (Shields, 2018). New structures and ways of sharing information, monitoring, and ensuring accountability will be essential. Adaptive leadership will be required to identify those structures that require technical change and those that require

adaptive solutions (Heifetz et al., 2009). This ability to pivot between the structural work and the deeper mindset shift will lay the foundation for the Acceleration and Institutionalization phases.

Possible Solutions to Address the Problem of Practice

A preferred solution to the PoP must meet multiple conditions. Among these are adequate agency, sufficient resources, and a willingness to use a social justice perspective to address an equity issue. Directly connected to equitable access to service, the preferred solution will require transformative leadership—pushing toward deep change to achieve equity by deconstructing and reconstructing social-cultural knowledge (Shields, 2018). The Board’s creation of a dedicated administrator role provides me the agency to gather baseline data, create recommendations, and support the professional learning. It recognizes this issue as critical for students and staff. Carter et al. (2008) note that regarding challenging behaviours in classrooms, “the cost of stress related leave and increasing executive time is a substantial justification for focussing efforts on addressing this problem as a priority” (p. 157). Educators and support staff are raising the red flag on behaviour in classrooms, the lack of support felt, and its effect on employee mental well-being, physical health, and time away from work (Griffith & Tyner, 2019; Santor et al., 2019).

The Research Determined Non-Negotiables for the Best Solution

Research directs us to criteria that must be considered for a best-fit solution. The chosen solution must recognize that students exist in an ecosystem where they are a product of, and affected by, their microsystems and the interactions between those microsystems—their mesosystems (Bronfenbrenner, 1989). Martens and Witt (1988) suggest that an interactive systems approach to behaviour is required as the focus is not solely on the behaviour of the child, but more importantly on the “functional effectiveness of the whole classroom environment” (p. 278). The discounting of challenging behaviour as purposeful choice by students and considering

behaviour instead from an ecological perspective is reinforced by McGrath and Van Bergen (2019) who note that “teachers who perceived students’ disruptive behaviours as a consequence of development, temperamental, or ecological factors may be more likely to foster closeness with those students” (p. 344). Bitsika (2003) notes that “our ultimate responsibility to students with behavioural difficulties is to develop procedures of behaviour change that enhance their dignity and self-esteem...making the effort to understand the student’s experiences of the world (p. 97).

This emphasis on the educators’ response is supported by De Jong (2005) who stresses that it is critically important that “ownership and resolution of student behaviour issues remains with the teacher for as long as possible” (p. 362). Offloading to supports outside of the classroom environment does not promote the positive, close educator-student relationship which is another criteria of a preferred solution. De Jong (2005) calls relationship building fundamental to behavior improvement. McGrath and Van Bergen (2019) warn against a negative relationship cycle for educators and students with chronic challenging behaviours. Disruptive student behaviour leads to negative teacher emotion, negative teacher emotion causes distance in relationships and inspires educator feelings of failure, which discourages educators from investing in the student. Students who experience this reduced emotional support and lack of attachment to their educators are more likely to be disruptive and disconnected (McGrath & Van Bergen, 2019). The educator relationship and student behaviour are closely connected and central to planning for behavioural improvement (Baker et al., 2008; Collins et al., 2017; Hamre & Pianta, 2001; O’Connor et al., 2011). De Jong’s (2005) investigation into core principles and characteristics of best practices for improved behaviour in schools includes all of the elements mentioned above with the addition of professional learning for staff focused on monitoring and tracking to create accountable histories for students at risk. The chosen solution must address the

absence of best-practice direction for SSCs in order to create stronger SSC connections to educators and classroom microsystems, consistent tracking of behaviour support, and shared professional expertise in the SSC community.

Solution 1: Strengthen the Current School-by-School Framework

This solution would allow each school to maintain whichever programs or approaches are currently used in their building, but strengthen them with the central support I can provide in the newly created administrator role. Building on the existing model that values school voices and choices, coaches and consultants could support existing school programs of choice with professional learning offered to improve fidelity. Not all schools will have a model in place, but some will have made a considerable investment in a program and specific training. In order to leverage each school's current model to ensure that there is a strong universal Tier 1 approach in use, professional learning through large group release, and an in-school team—SSC and special education resource teacher (SERT)—format would be employed. Release time would not be required for consultants, coaches, SSCs, or SERTs, as these individuals have more flexible schedules. The special education consultants are the natural coaching group to facilitate this learning as they currently deliver the Behaviour Management Systems (2014) Training. Although it is not a model for universal Tier 1 support, it contains many of the big ideas that should be at play in schools: understanding of an ecological approach, recognition of protective and risk factors, comprehension of the function of behaviour versus choice, and the value of educator-student relationships. Working with schools to recognize and build capacity around their preferred behaviour support approach while educating for all around the big ideas of Behaviour Management Systems (2014) would add another layer to the work of the special education consultants. They would need to become familiar with the programs in use across the

Board—there are at least 6 brought to light by the Special Education Review (RRDSB, 2019b)—in order to provide training at the educator level on a school’s program of choice. Part of the training and support would include learning that addresses responses at Tier 2—targeted support beyond Tier 1—in order to ensure appropriate triaging between levels.

Solution 2: Strengthen Board-Wide SW and SSC Model

This solution would focus on the role of the SW and the SSC. SWs are new to RRDSB and are currently being utilized as a referral source to outside agencies. In addition, they see a small caseload of Tier 2 students and families who require targeted support. SWs do not engage directly with educators to coach or support classroom decisions and processes. In collaboration with the mental health lead, I would provide direction and support to SWs and SSCs. The role of the SW would be redefined to one that engages deeply with the SSCs and oversees positive behaviour support structures within schools. SSCs are currently supported by the Board mental health lead and have sometimes been under the umbrella of special education and sometimes within the portfolio of mental health and well-being. The new administration leadership and the SW support would provide stable connections for SSCs that would allow them to improve their in-school skill development and thus improve their contact with students on their caseload. On a more global level, SSCs would coach educators around best practices to create relationship-rich classroom ecosystems. The enormity of this task for an SSC, even with direction and support from central administration and the SWs, is recognized. It is doubtful that SSCs would get much further than improving engagement with students on their caseload and building consistent structures in their practice. Based on the demands of the job, changes to classroom ecosystems through SSC-educator coaching are unlikely to materialize.

Solution 3: Adopt a Team-Based, Consistent, Coaching Model for Educators

The final solution represents incremental change over time, but holds promise to produce the most profound level of change. It utilizes a central structure of leadership to foster authentic change, a few schools at a time. In my central administrator role, I would take on the data collection, planning, leadership, and oversight of accountability for this solution.

Before beginning the work in target schools, I would conduct a survey of educators, SSCs, and administrators to determine the behavior support approaches and programs currently in use. Using this data, a decision could be made regarding streamlining these Tier 1 programs and approaches to ensure that the Board is utilizing high quality evidence-based practices with consistency. It should be noted that although the word *program* is used, one focus of the learning would be that there is no formalized program that results in positive behaviour support for students. Instead, well-being is improved through the proactive, relational work that occurs in a positive classroom ecosystem that features high expectations with collaborative practices that value student voice (Tranter et al., 2018). Pulling the best practices from these quality programs is what is meant by streamlining high-quality Tier 1 programs and approaches. This would include moving beyond a theoretical understanding to a practical understanding of what these best practices *look like*, *sound like*, and *feel like* in classrooms. This ensures that the staff within the Board begin to speak a shared language, build shared understandings, and engage in similar positive practices. This specificity of practice is important to the monitoring and evaluation processes of the CBAM that will be used to assess educator change.

Using a gradual rollout structure further outlined in the Implementation section, all schools would be impacted in fewer than three years. This would mean that the central administrator role could be phased out or collapsed into another central role at the end of that

time. To truly focus on improving consistency and best practice for SSCs, it would enrich the work to invest in an additional role—a central SSC role—to bring clarity, training, mentorship, and crisis support to the existing SSC employee group. To focus on mindset shifts and skill development, the central administrator-SSC team would work directly with school teams comprised of each target school’s administration, SSC, SERT, and educator(s).

In order to start small in the first year, a few larger schools with high needs, possibly schools with core classes, complex demographics, or high aggressive incident data would be targeted. The structure of a Plan-Do-Study-Act (PDSA) cycle would be utilized. The PDSA model provides an iterative improvement cycle format that can be used to improve the components of an innovation, measure the effectiveness of an intervention, and provide a means to scale the growth of an improvement plan (King et al., 2017). It requires consideration of planning for the change (P), trying the plan (D), observing the results (S), and modifying the action (A) to reflect the learning. The learning happens authentically when a school consults the team about a student or classroom dealing with a high degree or intensity of challenging behaviours. Beginning by examining the centrally streamlined Tier 1 universal best practices, the team would develop a plan that honours the Board mandated values and approaches. The educator, and any other supportive professionals required, would execute the plan and any changes to student behaviour(s) would be observed and documented. Based on studying this, modifications could be made and next steps determined. The CBAM tools—further discussed in the Monitoring and Evaluation section—provide a means of assessing, tracking, and evaluating changes to educator practice. As the work occurs, one teacher at a time, the reflection on each authentic intervention—studying the work, will inform the school to run the PDSA again based on new learning—acting with understanding. As more PDSA cycles are executed, the learning

becomes embedded. The Implementation section explains how this incremental work with individual school teams, in conjunction with larger system sharing and learning, reflection, and celebration would result in one large PDSA that would eventually touch the entire system.

The Preferred Solution

Any solution under consideration would need to be measured against the non-negotiables determined by the research shared earlier in this section (see Appendix E for a table of all solutions measured against the non-negotiables). The resources for the first solution would include supply teacher coverage for large professional learning opportunities and smaller in-school opportunities with the school team. If special education consultants were to take on these additional tasks, the Special Education Department would need to increase the number of consultants they hire as they are at full capacity with their special education responsibilities. A concern about a professional learning model that takes the form of information downloading would be that educators don't have opportunities for authentic application and feedback. While this solution would address educator perception through professional learning, it would not develop skills and strategies in a hands-on manner. After the learning session, there is no check-in or monitoring to ensure accountability and measure growth. The knowledge will be available, but there will be no authentic transfer of skills or accountability to actually institute the models, programs, or practices. In addition, costs to increase the number of special education consultants to deliver this solution would be high.

Solution 2 utilizes the leadership of the SSCs and offers direction through the new administrator position and SWs in each building. Behaviour support in RRDSB would take on a more consistent focus between schools with common best practices. The addition of the special project administrator structure, in collaboration with the mental health lead, will support

supervision and accountability of SWs with distributed leadership to SSCs. However, with the limited number of SWs for the entire board, they would not be able to take on this responsibility and fulfill the other tasks in their mandate resulting in the need for at least one more SW. In addition there would likely be union concerns regarding SWs directing and coaching the SSC group. Potentially the largest negative of this solution is that it does not infiltrate at the classroom educator level. Relationships might be impacted by improvements in behaviour with this solution, but those strengthened relationships would be with SSCs, not between students and educators. This would increase the downloading of behaviour management to sources outside to the classroom microsystem and would not result in changes to educator perception or practice. The end result would be a more consistent Board-lead SSC team, but the solution would not improve knowledge, understanding, perception, relationships, and strategies for educators, and its effect would not be strong enough to transform school environments.

Solution 3 would address educator perception, teach skills and strategies, value educator and student voice, strengthen educator-student relationships, and reframe behaviour challenges as skill-based, like academic challenges. As schools engage in authentic hands-on work with specific students and their families, they would be engaging in PDSA style learning and embedding new approaches, mindsets, and skills. This is a learn-by-doing model. It is not enough to know the theoretical *why*; it must be paired with the practical *how*. The coaching and hands-on learning of this third solution matches well with the tracking and accountability offered by the CBAM (Hord et al., 1987) discussed in the Monitoring and Evaluation section. The costs could be kept to a minimum with the newly created administrative leadership role and a new central SSC role. These costs would fade over time as the learning became embedded in schools. The more the school team develops itself, with the support of the central partners, the more

quickly the Board can move away from these additional leadership roles. When the evidence-informed requirements and the solutions are viewed comparatively, the third solution is the one that most closely matches the research-based non-negotiables shared earlier in this section.

Leadership Ethics and Organizational Change

The preferred solution has at its core a reframing of educator perception of behaviour as a response to environmental demands to which these students do not have the skills to respond adaptively (Greene, 2014b, 2016). This requires educators to regard the student as a complex individual at the centre of multiple environments or ecosystems and appreciate that they—educators, and the classroom environment—are an integral part of the student’s system. For some educators, this shift can be contrary to what they see as their role, that being to instruct for academic skill development. Shapiro and Strefkovich (2016) refer to this incongruity in their discussion of the ethic of the profession. They add their voice to ethicists and educators who recognize that a primary focus on nurturing and encouraging students as the central figures in the educational process will “likely go against the grain of those attempting to make ‘achievement’ a top priority” (p. 32). They highlight what they consider to be the driving principle in education, in fact, a “moral imperative” for the profession, which is “to serve in the best interests of the student” (Shapiro & Strefkovich, 2016, p. 40). Shapiro and Strefkovich (2016) added this dimension of professional ethics to Starratt’s (1991) ethics of justice, care, and critique. Their focus on critical ethics supports a social justice theme requiring that leaders “confront the moral issues involved when schools disproportionately benefit some groups in society and fail others” (Starratt, 1991, p. 190). If the ethic of critique brings to light unethical conditions, the ethic of justice provides a mandate to serve the common good and the rights of the individual. An ethic of caring will hold the integrity of human relationships paramount and require engagement in

ways that honour the dignity of each person (Starratt, 1991), including the student. The PoP solution that involves accountable coaching and learning to problem solve through collaboration, meets the ethics of critique, care, and justice (see Appendix F for a visual representation of Starratt's work).

Managing resistance will necessitate the creation of a socially just system culture where leaders “do more than just talk a good game—they practice what they preach and are proactive role models for ethical conduct” (Brown & Trevino, 2006, p. 597). This congruence between message and action is a feature of authentic leadership (Avolio et al., 2004). The missing element making authentic leadership inherently ethical is the presence of self-awareness in place of other-awareness (Brown & Trevino, 2006). For this PoP to meet that cultural threshold of care for others first, it benefits from an over-arching emphasis on transformative leadership, as it is “inherently ethical and focused both on excellence and social justice” (Shields, 2014, p. 29).

Central to the PoP is the expectation that educators build the supportive relationships with students and families, and the capacity to take into account student concerns when constructing their learning environments. This ethical duty to engage can be achieved by leaders who communicate high ethical standards, consider the needs of stakeholders, and challenge the deficit thinking patterns of their followers (Brown & Trevino, 2006). Weiner (2006) tells us that we are called to “acknowledge deficit explanations and examine them critically” (p. 43). A deficit culture creates an assumption that challenging student behaviours originate in the student or their families, not within the class or school ecological system; “deficit ideology is a blame-the-victim mentality” (Gorski, 2018, p. 60). Weiner (2006) notes that “school practices and assumptions emerging from the deficit paradigm often hide student and teacher abilities” (p. 43). Weiner questions explanations outside of the student and suggests that the unrecognized

assumptions educators have can only be dispelled through honest conversations to better understand student perspective. It is our ethical responsibility as educators to disrupt the paradigm and dispel the assumptions.

Epstein (1995) reminds us that “good partnerships withstand questions, conflicts, debates, and disagreements; provide structures and processes to solve problems, and are maintained—even strengthened—after differences have been resolved” (p. 712). It is anticipated that there will be resistance from educators who may feel that they are being blamed for setting up the conditions for the student’s challenging behaviour. Some educators will disagree with the premise that behaviour is not a choice. Other educators will not easily agree that their responsibility to support well-being is equal to their responsibility to service academics. Resistance of these types can be managed through the influence exerted by authentic leadership. If followers can see that the leader asking them to do things differently has modeled and been true to this message in their own daily life, they may not agree, but they will respect the expectation. Over time, the hope is that positive changes in their own relationships with their students and continuous learning will influence a lasting change in beliefs.

Brown and Trevino (2006) suggest that followers can be influenced to behave ethically by leaders who are credible and attractive role models. Attractiveness is established through the care of and for others, and fair treatment of everyone (Brown & Trevino, 2006). Leadership demonstrations of ethical decision-making in support of students whose challenging behaviours have resulted in exclusion and marginalization make these leaders attractive, and encourage followers to observe and view situations through this ethical treatment lens. Leader credibility, especially during change and uncertainty, is achieved through a words-deeds alignment (Moorman & Grover, 2009). Ethical leaders who are perceived as authentic can influence the

reasoning in groups, especially through the coaching model that is proposed in the PoP solution. Accountability to the leadership is required as followers of those who lead ethically expect that an ethical leader will hold followers accountable in a clear way (Brown & Trevino, 2006). The fact that the OIP utilizes system leadership that involves a non-union member means that accountability is possible.

Empowering the unheard voices, both teachers and students, is imperative for ethical leadership for change. Moral muteness (Bird & Waters, 1989) cannot be our reason to neglect inequities we see in the school experiences of our students and families. Bird and Waters (1989) tell us that when those in positions of leadership shrink from using their voices, “many moral abuses are ignored, many moral ideals are not pursued, and many moral dilemmas remain unresolved” (p. 82). Gentile’s (2017) *Voice to Values* work assumes that “most of us already want to act on our values, but that we also want to feel that we have a reasonable chance of doing so effectively and successfully” (p. 122). Gentile’s (2017) program is especially well suited for dialogue across all levels of organizational power, where it is important that educator voices can be heard by management. This is foundational to the relational values-centred conversations that must include all voices (Begley, 2006) and is foundational to the CBAM (Hord et al., 1987) this OIP proposes in its Monitoring and Evaluation plan. Cherkowski et al.’s (2015) work reminds us that moral agency is a relational concept and intertwines with leadership built on trust where “the moral tone of the school is co-constructed” (p. 3). This echoes Greenfield’s (2004) position that “education of the public’s children is by its very nature a moral activity” and that “relationships among people are at the very center of the work of school administrators and teachers, and for this reason school leadership is, by its nature and focus, a moral activity” (p. 174). The continued themes of relationships and collaboration are central to the proposed solution. Finally, Starratt’s

(2005) domains of ethical leadership responsibility affirm that the ethics-rich work requires a collaborative focus:

The honouring of the ethical responsibilities creates the foundation for the leader's invitation to move beyond transactional ethics and engage in transformative ethics. When the community responds to that invitation, it begins to own a communal pursuit of higher, altruistic ideals. (p. 133)

In my newly created special project role, I will utilize a transformative leadership approach that challenges the systemic practices that have fostered inequitable support to students with challenging behaviours. In order to do the relationship-based work required to change educator lenses, my authentic leadership approach will breed trust, and my adaptive leadership style will manage the technical and adaptive challenges. This very personal work that encompasses multiple spheres of influence requires an ethical duty to turn up the volume on voices often silenced through a solution that fosters accountability and turns theoretical learning into doing. These elements will be central to the planning for implementing, evaluating, and communicating the change featured in Chapter 3.

Chapter 3: Implementation, Evaluation, and Communication

This chapter explores an implementation plan viewed through my transformative and adaptive leadership lenses. In addition, my authentic leadership approach will foster trust (Ilies et al., 2005) and support educators in the difficult task of reflecting on their mindset and practice. The plan addresses data collection, recommendations, and professional learning for multiple employee groups with a focus on strengthening the SSC community of practice. The Cawsey et al. (2016) Change Path Model is utilized to map a PDSA that will impact the entire Board. As Fullan (2005) notes, the heroic administrator or SSC cannot actualize the needed change to opportunity and outcome for students. Expertise must be developed within school teams to promote independence. Mini-PDSAs are proposed at the Mobilization stage for the personalized work in individual school environments. Hord et al.'s (1987) CBAM, with its consideration of educator voice and practice, features prominently in the monitoring and evaluation plan. Finally, communication is explored as it will materialize at all stages in the Cawsey et al. (2016) Change Path Model.

Change Implementation Plan

The goal for this implementation plan is to reduce retroactive, reactionary responses to behaviour in schools in favour of more proactive, supportive responses. Based on each school's current use of approaches, plans will be tailored to individual school profiles to develop shared understandings and increase reliance on inclusive, evidence-based practices. These practices will feature the high degree of control in combination with the high level of support (Costello et al., 2010) that is recommended for students with histories of challenge and adversity (Carrere & Kinder, 2021). This model tells us that all people are more likely to experience positive outcomes when those in positions of authority have high expectations and clear boundaries, in

combination with a supportive and nurturing approach (Costello et al., 2010; see Appendix G for a visual representation of the Social Discipline Window). The plan is about doing things *with* people, not *to* people, and it applies to students *and* educators.

Awakening

At the beginning of any change plan is the recognition that there is a problem. The Awakening stage alerts people to the fact that the current state is not ideal and a change is required to move the organization to a more desirable position. In order to examine the need, Cawsey et al. (2016) recommend conducting an organizational analysis with elements similar to those recommended by Beckhard and Harris (1987). When examining the six areas of challenge Beckhard and Harris (1987) present, three areas stand out as worthy of consideration in the RRDSB implementation plan: mission, way of doing business, and culture. With reference to mission, schools have historically considered their role to be an academic one, without consideration of the effects of the various ecosystems in which students live. Over time, school purpose has remained relatively static and its approach is often unidirectional—educators deliver and students receive—instead of dynamic with reciprocal interactions (Conroy et al., 2009). The mission of schools has been expanding to include social-emotional learning and well-being (Santor et al., 2011); however, RRDSB classroom educator surveys (2018a, 2019a) and the Special Education Review (2019b) indicate an absence of confidence and comfort in these areas. Educators report a default to managing behaviour with control versus a supportive mindset. Administrators report observing responses to student behaviour in all quadrants of the Social Discipline Window (Costello et al., 2010) but too infrequently in the recommended *with* quadrant (RRDSB, 2019b). Changes to the mission and way of doing business will require a shift in the norms, beliefs and values in the organization (Beckhard & Harris, 1987). Lipton (1996)

notes that large changes of this type, that strike at the mission and culture of an organization, are best achieved by *walking the talk* (Weick, 1995) with educators in order to create the trust necessary for collaborative change.

The Awakening sets the stage for implementation. The first step will be to communicate the development of a new role to address the important educator feedback from the RRDSB classroom educator surveys (2018a, 2019a) and the Special Education Review (2019b). As the CF in this role, I will develop the plan and oversee its implementation (Hord et al., 1987). Through conversations and surveys with administrators, SSCs, and educators, I will model a collaborative communication style that welcomes all voices in the same way we encourage educators to solicit all student voices. This focus on hearing and valuing all voices is part of the transformative leadership stance (Shields, 2018) central to this OIP. I will analyze the data gained from the conversations, surveys, and relevant research to develop a future state vision for communication to the Board (see Appendix H for a visual representation of the gap between Current and Future State). Communication at the Awakening stage is pivotal to buy-in. A detailed plan for communication will be addressed in the Communication section.

In the Awakening phase, key areas will be considered in order to make the recommendations necessary to mobilize a system-wide approach (see Appendix I for a graphic representation of the Awakening phase). Central to this work will be the creation of baseline profiles for each elementary school. These profiles will outline the programs and approaches currently in use at each school and the areas of need that each school identifies with respect to behaviour supports. In addition, a better understanding of the roles and expectations of multiple employee groups will be developed based on these surveys and interviews. Clarification of role

responsibilities, especially the role of SSC, is essential. Data in these areas will allow me to target particular schools and employee groups for the Mobilization phase.

Mobilization

The Awakening phase alerts senior staff to the specific discrepancies between the current and ideal state. In response, a two year Mobilization plan will be proposed (see Appendix J for a graphic representation of the Mobilization phase). This plan will begin with the foundational data gathered in the Awakening phase. It is anticipated that similar to the fragmented pattern of behavioural approaches in schools it will also be discovered that the services provided by SSCs vary widely between sites, are disjointed, and lack direction and supervision.

The SSC role is a crucial one that bridges students, educators, administrators, families, and communities. Their expertise around mental health support means that the change plan is heavily focused on their service to staff, students, and families. This plan includes a new system SSC role to work with the project administrator to create a central team for this change initiative. Together, the central SSC, mental health lead, and I will support the professional learning of the SSC community and plan and conduct family of schools meetings. Over time, a gradual release model will enable the central SSC to support the SSC group with increased independence. These learning opportunities will focus on new mindset shifts and practices where learning can be applied deeply through a problems of practice lens. Based on the work around streamlining the SSC practices and processes, a new SSC handbook will be developed. This clarity and consistency will allow training processes for SSCs, especially those newly hired, to be consolidated.

I will also conduct professional learning for all administrators in small chunks at each monthly senior administrators' day. This would include time at each senior administrators'

meeting for explicit education around the social justice nature of the work, and the desired approaches the Board is advocating. In break-out groups, principals and vice principals will discuss students and environments of concern, utilizing Katz et al.'s (2018) Inquiry Frameworks and Leader Learning Team conversation practices. Modeling and utilizing these accountable approaches supports ongoing assessment of growth.

All employees will have access to virtual professional learning that brings to light the social justice responsibility of all staff to student social-emotional learning. A focus on student-staff relationships, understanding that every staff member is part of the beneficial relationship structures in the school ecosystem, will be stressed. Professional learning providers will be chosen from the authors and experts in the universal best practices resource (see Appendix K for a visual representation).

Pulling from the best practices of the many profitable, but inconsistently administered behaviour support approaches currently in use, I will create a detailed document outlining best practices for safe and supporting schools. This document will guide learning and streamline practices based on the Board-endorsed resources. There will be a focus on deep learning around Tier 1 supports and opportunities to practice responses that extend to Tier 2, such as Collaborative and Proactive Solutions (Greene, 2014b, 2016). The detailed reference document will contain models and checklists called Configuration Innovation Maps (Hord et al., 1987)—discussed in the Monitoring and Evaluation section—that clearly outline what recommended best practices look like school-wide and specifically in classrooms. The document will feature a focus on equitable support of all students and will characterize the work as a call to social justice.

Using school data that includes number of aggressive incidents, socioeconomic demographics, presence of high needs core classes, and school team interest, the central team

will target four schools for intensive learning and application of best practices. In coordination with the central SSC, and using Innovation Configuration Maps (Hord et al., 1987), I will lead condensed PDSA cycles at these schools. In each school, needs will be examined, and based on planning, execution and study of the results, shifts to mindset and practice will be facilitated. Central to the change criteria will be that each school develops a strong on-site team consisting of the school-based SSC, administration, and SERT. Work with the school-based team and educators attached to key classrooms will deepen their understanding of student behaviour as the communication of lagging skills (Greene, 2014b) and foster a supportive approach within the school. Pivotal will be the work to build understanding of marginalizing factors, such as trauma and socioeconomic needs, and the importance of student-educator relationships.

Building capacity for these school teams will be important for school independence. Release funding will be available for the needs-based professional learning for educators in those classrooms directly chosen for support. I will bridge gaps between central departments in order to ensure that coaches and consultants with expertise in curriculum and special education, including sensory needs specialists, are included. Authentic leadership is well suited to this phase because the work will involve moving followers' regulation from external and introjected to identified (Gardner et al., 2005). Identified regulation, where the practices become of value to the staff member, is necessary to propel lasting change. Any deep, transformative change requires this shift in mindset for practitioners so that educators do the work because they value it (Gardner et al., 2005).

Acceleration

In Year Two, the number of schools involved will increase, professional learning will deepen, and family and community connections will become an added focus for Year One

schools. As more educators and support personnel are included, and as administrators and SSCs grow their understanding through professional learning and problem of practice groups, growth will accelerate.

In the Acceleration phase, the focus for Year One target schools will be the consolidation of in-school team learning (see Appendix L for a graphic representation of the Acceleration phase). Tier 1 conditions in these schools will be monitored and supported, with a focus on developing confidence with Tier 2 interventions. Expansion in Year One schools will focus on family, outside agencies, and community to deepen the scope of transformative change (Shields, 2018). Although families of students in the targeted Year One classrooms would have been exposed to conversations and ideas around the safe and supporting ideals at work in the classroom and school, this will be formally shared with all families through opportunities at open house events, *Welcome to School* initiatives, print materials shared with school council, and in ongoing family communications. A common language that values educator-student relationships will be evident from all staff during family discussions and problem solving opportunities. In a similar fashion to the Board's successful past practices when the Special Education Department was re-envisioned, the central team—SSC, mental health lead, and myself—will share the Board's focus with community agencies to create partnerships for supports that may be required beyond the school environment. We will facilitate a gradual release toward independence for Year One schools. In addition, the central team will continue to monitor fidelity to manage accountability and to deepen the learning within the school community. The school-based team can determine the best means to continue the learning within each school—through informal PLCs, a school improvement goal, or in-school release for staff.

The system team will choose four additional schools, with specific classrooms and educators, for the second year Acceleration phase. The central team will focus attention on the new schools, learning from the PDSA cycles in the Year One schools. The expansion will include a twinning between in-school teams and educators from schools involved in the Year One Mobilization phase to support the developing school teams in the Year Two Acceleration schools. Shared learning of positive growth models and stories across schools will become celebrations of success and new learning communicated to stakeholders. The recognition and value in the sharing of learning—from one school to another, through presentations to trustees, sharing at senior administrators' meetings, and through invitations to contribute to neighbouring school staff meetings—will recognize team success and accomplishment.

Institutionalization

The close of the Acceleration phase with its continued focus on professional learning, growth of family and community connection, and expansion to additional schools will result in a more stable change result. Improved SSC training practices and support documents will ensure that the endorsed principles and practices become entrenched. Skilled school teams will now include best practices for inclusive schools in design, reflection, self-assessment, and improvement planning. As the needs of the schools who were not included in the first and second years are considerably less complex than the eight schools chosen, they will have grown based on the practices employed in the District-level learning. For administrators, this learning occurs at senior administrators' meetings using Inquiry Frameworks (Katz et al., 2018), and for school-based educators, the learning occurs through staff meeting presentations and professional learning visits from neighbouring school teams. Likewise, SSCs outside of the targeted schools have benefitted from two years of SSC community of practice work including authentic problem

of practice sessions. New SSCs will benefit from the clarity of a comprehensive handbook and mentoring training with the central SSC. At this point, the Board can re-evaluate the need for the CF and central SSC positions. Mentoring and training opportunities may occur organically. This may be the measure of true institutionalized change, when the individuals needed to plan, implement, mobilize and accelerate the change are no longer necessary. It should be noted, however, that continued monitoring even in the Institutionalization phase should be in place.

Limitations

No change plan will meet all needs. Success will depend on multiple factors involving the people who must commit to the change. Union partners have expressed the concern that educators feel overburdened already without the added responsibility of student mental health and well-being (Santor et al., 2019). This could create resistance. Collaborating with union partners before launching in order to anticipate and problem solve concerns will be beneficial. Transformative and courageous conversations with educators that shine a light on inequitable processes as well as building student relationships that are reciprocal versus power or control-based in nature, will be required (Shields, 2004; Gorski, 2018). Resistance can materialize if sufficient training experiences and opportunities to practice are not available (Cawsey et al., 2016). This resistance can be managed with explicit scripting and in-class support to ensure that educators are comfortable with new practices. This is especially true of intervention approaches, such as Collaborative and Proactive Solutions (Greene, 2014b) that support Tier 1 and, with practice, are extremely effective at Tier 2. The CBAM (Hord et al., 1987) referenced in the Monitoring and Evaluation section, will alert me to staff members experiencing discomfort so additional support can be provided. Communicating and eliciting feedback during implementation will allow me to engage the resistance and manage negative reaction by

removing obstacles (Kotter, 1995). This connection through feedback and stakeholder voice recognizes the change to recipients' psychological contract (Cawsey et al., 2016) and an authentic leadership approach identifies this in a transparent fashion. Creating this safe holding space is an element of adaptive leadership and "includes following through and delivering on both the transactional commitments related to the change, as well as the relational elements of the contract" (Cawsey et al., 2016, p. 229).

It is not anticipated that family members of students presenting with challenging behaviours will be resistant. However, some families who think that disruptive students should be excluded and punished may need clarifying communication on a case-by-case basis around the school's philosophy and practices that value inclusion, problem solving, and relationship repair. These caregivers are often the most vocal and understand how to navigate the system (Shields, 2018). When practices move to support equity, they may question the change. For this reason, there can be no surprises. The plan must include early family communication so that no family can suggest that they didn't know that the school had a vision for "socially just learning environments for all children" (Shields, 2004, p. 127).

A final limitation of the scope is that it fails to recognize those individuals who refuse to accept that education has a greater *why*—that it is about human development for more than a technologically advancing society, but for a world that is unclear, unstable, and ever-changing in complex ways (Shields, 2018). Schools need to be places where we dialogue and build relationships to create a socially just world (Shields, 2004; Weiner, 2003). This limitation can never be eradicated. What it requires is a fully implemented plan that will create an environment where individuals who shy away from practices for equity find it difficult to avoid taking on

some aspect to which they can commit. A strong transformative administrator for social justice is the best support for this limitation.

Change Process Monitoring and Evaluation

Key to any successful change process, beyond knowing where you are going, is a plan to monitor and evaluate your progress as you get there. Monitoring and evaluation frameworks allow leaders to focus on evaluation domains and gather formative and summative data (Markiewicz & Patrick, 2016). Monitoring can determine the need for corrective action and it supports accountability. Evaluation makes judgements about success and offers recommendations for future improvements (Markiewicz & Patrick, 2016). The purpose of monitoring and evaluation is to identify the results of implementation, shape new learning, and support decision-making (Markiewicz & Patrick, 2016). The results-based and decision-making foci are well matched to the CBAM (Hord et al., 1987) that will be used to gather monitoring and evaluation data.

Hord et al.'s (1987) CBAM applies chiefly to educational change processes. It combines monitoring and evaluation through clear operational procedures and benchmarks to ensure fidelity to new approaches (Hord et al., 1987), all through a lens that brings change recipients' feelings into focus. It uses three tools—the Stages of Concern Scale to assess emotional response, the Innovation Configuration Map to illustrate what the change should look like, and the Levels of Use Tool to measure the quality of implementation and fidelity to new practices. By considering the emotions and the comfort of the individuals expected to execute the practices, I can modify planning for pressure and support to move the change recipients to higher and more consistent levels of use (Roach et al., 2009).

As this OIP is one that uses a lens of social justice, it is imperative that leaders facilitate moral dialogue (Shields, 2004) with staff and students. Shields (2004) considers true, honest, relationship-building cultural conversations with students that help them make sense of their social reality a form of moral dialogue. She considers it also an imperative element of educational leadership. The CBAM's focus on dialogue can support educators in seeing and speaking about difficult concepts, including their failure to take into account the realities of the ecosystems of the students in their classrooms thus perpetuating "pathologies of silence" (Shields, 2004, p. 117). Shields suggests that these pathologizing silences occur when we don't know how to manage the difficult realities of social inequity. An evaluation tool that solicits and values educator feedback models a practitioner-based expectation for growth through dialogue. This replaces a deficit mindset that "allocates blame for poor school performance to children from minoritized groups based on generalizations, labels, and misguided assumptions" (Shields, 2004, p. 111). Evidence of a growth mindset can only be assessed from within educators. This makes the CBAM with its use of relationship-based conversations to gauge shifts in mindset highly appropriate. Hord et al.'s (1987) consideration of educator voice and the use of tracking tools is in keeping with Fullan and Quinn's (2016) focus on both collaborative cultures and accountability. The Stages of Concern Scale supports collaboration between the educator and central team. The Innovation Configuration Map and Levels of Use Tool support accountability (Roach et al., 2009).

In conjunction with Hord et al.'s (1987) CBAM, several PDSA cycles will be used in target schools. These iterative inquiry cycles from the world of improvement science, provide a framework to promote reflection and learning (Rohanna, 2017). Rohanna contrasts the PDSA approach with the *adopt*, *attack*, and *abandon* cycles that befall many new ideas and initiatives in

schools. Hord et al. (1987) also lament the frustration of dusty book closets filled with failed programs and never realized best practices. The PDSA structure provides a robust framework for reflecting on failed attempts at change instead of abandoning the approach. It recognizes that change is not a success-only journey and it provides the framework for “adapting strategies that initially fail [and] creating a culture of collaboration and learning from failures and successes” (Rohanna, 2017, p. 73). The Awakening, Mobilization, and Acceleration stages occur across a large Board-level PDSA. Embedded in the Mobilization phase, mini-PDSAs occur in target schools (see Appendix M for Board-level PDSA with mini-PDSAs represented).

In addition to a change cycle tool, Rohanna (2017) also advocates for the importance of an implementation manager dedicated to keeping monitoring and evaluation on track. As early as 1987, Hord et al. (1987) addressed the importance of effective CFs. Moffett (2000) echoed the virtues of external and internal facilitators or change agents designated to provide “support, technical assistance, and clarity [contributing to] internal capacity building and to a greater sense of personal mastery” (p. 36). She refers to a balance between pressure and support to enact change, noting that “pressure without support can lead to resistance and alienation [and] support without pressure can result in maintaining the status quo” (Moffett, 2000, p. 37). This echoes two of Fullan and Quinn’s (2016) drivers for coherence making strategies in change—collaborative cultures and securing accountability. According to Fullan and Quinn (2016), collaboration is what changes behaviour, and accountability is what brings that behaviour in line with internal and external measures. The importance of an adaptive leadership approach is highlighted in this balance between pressure and support. It allows a view from the balcony to diagnose the change landscape and the creation of safe holding spaces to engage in the pressure and support the work

(Heifetz et al., 2009, p. 32). Monitoring and evaluation structures are required to track where we are going and what we need to help us get there.

Shields (2004) reminds us that caring relationships and actions that consider the diverse social conditions of all of our students are necessary when using a social justice lens to remain accountable. Hord et al.'s (1987) CBAM's focus on listening to educator voices fits well with a social justice focus and an authentic leadership approach (Avolio et al., 2004). I will engage with staff in a caring and personalized manner where voices matter and where my role is to honour those voices and determine how to incorporate their unique perspectives into the plan for change. The CBAM applied through a PDSA model aligns with the adaptive leadership necessary to pivot based on both operational data and staff emotion data, including a safe space when faced with transition to change (Heifetz et al., 2009). It is expected that educators will experience discomfort with a variety of valid emotions when faced with change. Knowing where each staff member is on the Stages of Concern Scale allows leaders to provide safety and support for those individuals when needed most.

The large Board-level PDSA cycle complements Cawsey et al.'s (2016) Change Path Model (see Appendix M). The Awakening stage with its recognition of the problem coincides with the Plan stage of the PDSA model where the intensive work is done to evaluate the conditions of the organization, analyze the problem, and create the plan. The Mobilization stage, which includes utilizing the systems and structures, power and culture, communication, and change leader to leverage change and analyze the results, is well aligned with the Do and Study phases of the PDSA. The remaining phase, Acceleration, encompasses the standardizing of improvements, and planning for continuous growth found in the Act phase of the PDSA.

Hord et al.'s (1987, 2013) model subscribes to the key tenets that change occurs within individuals, through social interaction, and affects the emotional and behavioural dimensions of humans. It is fitting that as we ask educators to see the unique characteristics that each child brings to school, affected by their engagement in their various ecosystems, that we do the same for our educators—appreciate the emotions and thoughts that they bring to the change process. The CBAM is client-centred, just as the process of education should be student-centred. This notion of meeting educators where they are is very like the call to educators to meet students where they currently present and support their growth from that place. Hord et al. (1987) says of the CF's work that “effective change facilitators work with people in an adaptive and systemic way, designing interventions for clients' needs, realizing that those needs exist in particular contexts and settings” (p. 14). This coincides well with the focus on Bronfenbrenner's (1989) bioecological systems model that permeates this OIP.

The concept of Innovation Configuration Maps by Hord et al. (1987) refers to the creation of improvement maps or checklists that clearly describe the observable components of the change. These Innovation Configuration Maps allow schools to visualize the operational conditions for success considered in the Plan stage of the PDSA. They will be based on best practices from the variety of differing resources schools were using to support social-emotional learning and behaviour that I will compile into one user-friendly document. Streamlining the resources will result in conditions for success that can be referenced for monitoring and reassessing throughout the process. As part of the gap analysis, it appears that having never received direction or a mandate, individual schools have incorporated, with inconsistent fidelity, a wide variety of approaches and practices, including self-regulation, mindfulness, restorative justice, Collaborative and Proactive Solutions (Greene, 2014b), and functional behaviour

analysis. Creating Innovation Configuration Maps for Tier 1 universally applied best practices provides some foundational consistency between schools (see Appendix N for a sample Innovation Configuration Map). A limitation of this tool is that any change initiative that assesses teacher practice, outside of a contractual evaluation cycle, runs the risk of a negative union response that is likely to make educators averse to the change process. Use of the Innovation Configuration Map as a checklist in consultation with the educator minimizes the evaluative lens on teacher practice. Working with union partners in the construction of these maps is another way to avoid this difficulty. When qualitative levels of implementation are added to the Innovation Configuration Map, it can become a Levels of Use Tool that allows evaluation of implementation (see Appendix O for a sample Levels of Use Tool). The qualitative evaluative power of this tool will present an issue for union partners. One way to manage this is to utilize the Levels of Use Tool as an educator self-reflection rubric.

The deep work with educators of students presenting with complex needs and classrooms with a high degree of challenging behaviours is what occurs in the face-to-face work with the CF, the central SSC, and the school team. The Stages of Concern Scale complements the more operationally focused Innovation Configuration Map to assess the emotional side of change, placing educators on a seven-point continuum that addresses self, task, and impact concerns about an innovation (Hord et al., 1987, 2013; see Appendix P for a representation of the Stages of Concern Scale). Gundy and Berger (2016) remind us that teachers are central to change, and their concerns must be addressed. Hord et al.'s (1987) Stages of Concern Scale reinforces this in a measurable way. An educator's position on the scale can be determined through face-to-face conversation, open-ended statements, or use of the 35 item Stages of Concern Questionnaire, depending on the desired level of formality. The model makes suggestions for interventions

based on the location of the individual—from position zero through seven, on the Stages of Concern Scale. This provides the ability to pivot and adjust the original plan in response to educator results (Hollingshead, 2009). Based on positionality on the Stages of Concern Scale, I can return to an earlier stage to support the concern that is impeding the change recipient's movement on the scale. Monitoring educator concerns and engaging in conversations around best practices for inclusive and compassionate support of students with challenging behaviours is transformative leadership work. It is anticipated that this relationship-based work will create school communities where educators feel a responsibility and accountability to change their practice to reflect socially just moral and ethical values (Shields, 2004, 2010; Weiner, 2003).

As is echoed throughout change literature, Hord et al., (1987, 2013) reinforce the concept that CFs make a serious mistake if they believe that once innovation is introduced and initial training has occurred users will put the learning into practice. In their study of teacher participation in action research, Khoboli and O'Toole (2012) noted that “professional development programs that allow participants adequate time for the early cycles of action research will also allow time for the deep experience of early CBAM stages and this will increase the likelihood of successful implementation” (p. 146). Working directly with educators moves them through the Stages of Concern. As Bullard et al. (2017) note, “educators are often taught what a program is [but] they are not taught what it looks like carried out in real time” (p. 52). Considering educator voices when monitoring in order to determine appropriate interventions fits well with an adaptive leadership stance. It provides an opportunity for the CF to fully understand whether there is a need for adaptive or technical change support and respond appropriately (Heifetz et al., 2009). The monitoring provided by the CBAM allows the CF to

gather information used in the final evaluation that will be based on a simple If-Then-Then statement that grounds the work (see Appendix Q).

Addressed previously in this OIP, the Plan phase of the PDSA lays the foundation for the work in the Do phase. The Do section has multiple PDSAs embedded. Before launching these PDSAs, it is important to verbalize the If-Then-Then improvement statement that informs the work. Without a clear statement, there can be no final evaluation of the work. Generally, these statements focus on what an educator or system will do to create student change. In this case, there are two complementary statements for improvement. The first focuses on what the system will do to support school educator teams and the expected change for educators. The second links the educator change to the predicted student change. The improvement statement provides a reference for measurement. The baseline is the current condition from the Plan section, informed by the teacher feedback from RRDSB's own instruments (RRDSB 2018a, 2019a, 2019b).

The If-Then-Then statement provides the elements for evaluation. Each time the CF begins the work with a new classroom educator team, a mini-PDSA begins. The planning phase of each mini-PDSA involves assessing the current situation. The first assessment of the situation is the referral that outlines the profile of a student(s) and/or classroom that would benefit from support. An Innovation Configuration Map check-in that may include a Levels of Use assessment, and a Stages of Concern conversation or questionnaire for educators will generate a classroom process and practices baseline and an educator level of comfort measure. Based on the information, personalized system resources and professional development can be actioned. The central SSC and I will remain on site for a dedicated period of time working through the goals developed in the planning phase. Subsequent to that, the assessment using the Innovation Configuration Map, Levels of Use Tool, and Stages of Concern Scale can be repeated to measure

change. The ability to pivot is built into the monitoring measures. Just as we modify our planning for students when we discover that we are not seeing the intended outcomes, the same is true of educator supports. Check-in assessments are scheduled in intervals after the intervention to assess continued fidelity. Multiple PDSAs occurring across a number of schools means that the Board will have rich data to inform the larger Board PDSA in order to improve, standardize and plan for continuous improvement.

Plan to Communicate the Need for Change and the Change Process

The Cawsey et al. (2016) Change Path Model highlights communication and the management of messaging to stakeholders at a number of points on its trajectory for change. During the Awakening stage, there is a focus on developing and communicating a clear and inspiring vision for the need to change and a desired future state. In the Mobilization phase, Cawsey et al. (2016) reference focused communication that is specific to the needs of stakeholders and is responsive to the potential for resistance. Communication shifts to publicly sharing the wins and marking the milestones on the path to change in the Acceleration phase (Cawsey et al., 2016). This continued communication of the successes, reflection-fueled modifications, and the structures and processes that stabilize the change, will support the institutionalization of the change.

Communication for Awakening

Cawsey et al. (2016) refer to the first step in change as a strong vision that highlights the need for change and the anticipated future destination. Framing this is part of the strategic development behind a communication plan. Educators first have to recognize the need. In this case, the need is being voiced by educators themselves (RRDSB 2018a, 2019a, 2019b) and mirror concerns in the literature (Santor et al., 2019). Bridgeland et al. (2006) reported that

almost two thirds of high school dropouts wished that educators had done more to enforce classroom discipline. Crosby (2015) tells us that more than 25% of children experience trauma across their ecosystems that impedes general success at school. These types of evidence are important in emphasizing the need for change and the importance of safe, supporting, and collaborative ecosystems.

As Sinek (2009) reminds us, successful organizations know their *why*. Communicating the *why* is important for system buy-in. People are motivated and invigorated to be a part of something to which they connect. The assumption can be made that in an education system, most employees believe in developing children for future success. There can be discrepancy in the *how*, with some educators believing this is achieved solely through academic programming and others believing it is a more holistic task that combines academics, social-emotional learning, and well-being. Kochhar-Bryant and Heishman (2010) define holistic education to be “concerned with the development of every person’s intellectual, emotional, social, physical, artistic, creative, and spiritual potentials” (p. 6). This aligns well with the social justice frame of this OIP and echoes Shields (2004) when she speaks of the educator’s responsibility to provide an education that “balances and values both social justice and academic excellence” (p. 125). Of late, many educators are aware that regardless of their belief in *how*, success in today’s world will require more than just academic proficiency (Fullan & Langworthy, 2014; Kochhar-Bryant & Heishman 2010). The difference of opinion for educators is around the issue of responsibility for the social-emotional dimension of student growth, often perceiving this as an area best supported at home, through the SSC, or by outside community agencies. This means that the important *why* that Sinek (2009) references must be clearly communicated in the Awakening stage of the plan. Miller (2007) sums up this *why* by claiming that educators’ most important and lasting

contribution to the world will be to care about and tend to the whole child. Environments that do this must be created collaboratively by educators who are present and caring. These educators create safe and supporting spaces that provide meaningful, developmentally appropriate academics, foster healthy bodies and self-images, and value relationships with students and community. The *why* of education then is redefined as human development for a more socially just future, and the *how* focuses on the elements of safe and supporting school ecosystems that nurture that development. This potentially new re-framing of the purpose for education must be front and center in communication for Awakening.

In addition to a need and a *why*, Cawsey et al.'s (2016) Awakening stage requires a vision. Based on Lipton's (1996) work, vision is the additive result of mission, strategy, and culture. Not unlike Sinek (2011), Lipton focuses heavily on the *why* as the fundamental question. To that, he adds the operational logic of strategy, and finally, the key—organizational culture. It is important when communicating to understand the culture of the group with whom you are communicating. Sinek (2011), who insists that people need to be connected to the *why* of the work not the *what* of the work, suggests that when the *why* is unclear, the growth, loyalty and inspiration suffer. Lipton (1996) notes that a vision is only believable if stakeholders feel that management is invested in the vision and committed to its future. They must perceive the vision as an enduring commitment. This important leadership responsibility points to the need for authenticity; "organizational culture is changed only and managed only when a leader's behaviour matches the message" and "the impact of not walking the talk can devastate a manager's long-term credibility" (Lipton, 1996, p. 89).

The communication during this Awakening phase will begin with union partners in order to understand their concerns and suggestions for the plan. Having these conversations before any

data collection and planning with members in schools will avoid difficult conversations that could arise if union partners were to have concerns with elements of the plan. It is best to solve these in advance and be true to the authentic leadership model by including this important group. Including them first sends the message that we are not pushing a top-down agenda but instead, that the concerns of employees are primary to the planning. Subsequent to this, face-to-face messaging to senior management will occur simultaneous to examining the Board's Special Education Review (RRDSB, 2019b). This review recommends further investigation and a plan in response to educator concerns about supporting students in the areas of behaviour and well-being. A communication launch that connects the findings and the new vision based on those findings makes the timing appropriate. An in-person venue for communication with administrators, superintendents, and the director at a senior administrators' meeting presents the collaborative environment to field important questions and respond to administrators' concerns. In keeping with authentic leadership and a CBAM for monitoring and evaluation, opportunities to listen and validate concerns are important. A similar communication for Awakening will occur with trustees in conjunction with sharing the Special Education Review (RRDSB, 2019b) recommendations. Comparable in-person launches will occur with the Special Education Advisory Committee that meets monthly and the District Parent Involvement Committee. A foundational visual will be useful in grounding communication (see Appendix R for a Change Vision representation).

Administrators will be tasked with communicating to awaken staff and school-based parent councils to the change vision. The expectation is that because it reflects a need staff has expressed, there should be minimal educator resistance. Instead, there may be curiosity that aligns with Hord et al.'s (1987) self-concerns section of the Stages of Concern—awareness,

informational, and personal concerns. It can be expected that resistance may be experienced with educator union partners, as this project may be perceived as an expansion to the expectations for educators as it asks that they extend their work into areas that may not be academic in nature. With respect to the SSC union, it can be predicted that it will not be resistant as long as the change is communicated as an opportunity to increase SSC value to the system as experts in their field with the potential to improve job security and working conditions. In consideration of possible resistance, communication with union partners is included in a consultative manner at the Awakening stage when the vision is constructed. They will be included in the initial system-level conversations with superintendents, special education and mental health leads, and myself as the CF, prior to communications for Awakening. Union partners will be invited to share their own messaging with their members that supports the broader system announcements.

During this phase of the change model, the plan for information gathering to inform Mobilization will be unveiled. A first step is to announce, through Board email, my appointment as the CF. The staffing announcement is an opportunity to highlight the purpose of the CF which is to investigate the system strengths and needs in supporting students who present with challenging behaviours, make recommendations, and lead the learning based on the findings. As described in the Implementation plan, the initial investigation stage will occur through interviews with administrators and SSCs, in conjunction with partially anonymous educator surveys. This employee input is important to a leadership approach that is transformative, demanding moral dialogue (Shields, 2004), and its focus on employee concerns aligns well with monitoring and evaluation using Hord et al.'s (1987) CBAM. The face-to-face communications between the CF and administrators and SSCs will allow opportunities for increased communication for

Awakening with these employee groups, as they will be centrally involved with the Implementation plan.

An adaptive leader examines problems to determine whether the elements are process-oriented—technical, or requiring shifts to understanding and mindset—adaptive, or both. Results of the communication for Awakening conversations and surveys will provide the view from the balcony necessary to communicate for Mobilization (Heifetz et al., 2009, p. 32). These first opportunities for communication, being conversational and valuing voices, set the stage for transformative leadership that will “critique the ways in which our present practices marginalize some students and their lived experiences and privilege others—both overtly and through our silences” (Shields, 2004, p. 127).

Communication for Mobilization

At this stage of the Change Path Model (Cawsey et al., 2016), communication is for Mobilization of the change plan. It exists at an organization-wide level with an eye toward managing stakeholder reactions and the potential for resistance to the execution of the change. It is important at this stage that communication of the Implementation plan is clear, simple, and accessible. Cawsey et al. (2016) remind us that a message that is flawed and unclear will lead to stakeholder doubt and mistrust.

Managing change recipient and stakeholder reactions depends on a well-executed, consistent message. In addition, it is beneficial to anticipate stakeholder reaction based on common change recipient thinking patterns (Cawsey et al., 2016). Response to change can be dependent on an individual’s predisposition to change. Everett’s (1983) work on diffusion of innovations with its bell curve featuring a predictable distribution of innovators, early adopters, early majority, late majority, and laggards illustrates this. In addition, prior experience, reactions

of co-workers and trusted peers, and the perception of cost-benefit analysis must be considered. One key element is trust in the CF. This is the benefit of adopting an authentic leadership style. Cawsey et al. (2016) tell us that beyond the words-deed alignment of the leader, there must be alignment between the leader's words and the processes and structures in the system.

The Change Vision—Appendix R, provided to all stakeholders in the Awakening stage, the Mind Map—Appendix K, Innovation Configuration Map—Appendix N, and the detailed best practices compilation I develop will ground the foundational practices and ideas. This enables administrators, SSCs, educators, and stakeholders to visualize their role. This continued respect for, and communication about, employee concerns will support forward movement on the CBAM (Hord et al., 1987) Stages of Concern Scale. To encourage reflection, the communication style exercised between school team and central team will be consistent with the humble inquiry type that *asks* instead of *tells* (Schein, 2013).

Communication for Acceleration

Managing communication for Acceleration means that the CF cannot step away until the change is established. Communication needs to continue directly with educator teams in buildings, but now will arrive through multiple channels. The relationship-based learn-by-doing approach for lasting change within the classroom environment means that the school team can witness the student-educator growth and communicate that tangibly to colleagues. Simultaneous to this, administrators in these schools are tasked with keeping communication about the work alive through check-ins at staff meetings, conversations with school council, and consistent noticing and naming of the work being done in the building to create a shared language. The Innovation Configuration Map can be used by the in-school team to do their own monitoring and communicate this. In addition, school teams from Year One schools can begin to meet with

administration-SSC-SERT-educator core teams in their twinned Year Two schools to communicate their success and support the work in these schools.

This phase of the Change Path Model (Cawsey et al., 2016) benefits from the celebration of small wins and milestones. Tracking the growth of a child's ability to self-regulate, build connections, solve problems, and develop relationships is a win that everyone who experiences it can celebrate. These success stories need to be shared at senior administrators' meetings, SSC community of practice meetings, and at school staff meetings. Celebrations of the positive growth with the students themselves and their families are especially important. These can occur through phone calls home, written communication, and frequent positive check-ins with students. Completing embedded PDSA cycles to refine and reflect on the learning will be framed as reasons to celebrate, as members of the Year One schools will support the Year Two schools. School improvements measured by the Levels of Use Tool are reasons for celebration. Sharing of problems of practice in the SSC professional learning community and similar sharing at administrators' monthly meetings through Inquiry Frameworks and Leader Learning Team (Katz et al.'s, 2018) conversations will lead colleagues to recognize each other as skilled in the strategies needed to build safe and supporting schools for all students. Celebrations will take the form of ongoing positive reporting to school councils, senior executive, trustees, the Parent Involvement Committee, and the Special Education Advisory Committee. Educators will have the opportunity to demonstrate increased comfort and successful implementation of practices evidenced by their movement along the CBAM (Hord et al., 1987) pathway. Further opportunities for professional learning are a means of celebration for early-adopters and all staff who show interest. These can take the form of investments in continued learning at virtual or in-person conferences. Year One school teams will share communication with Year Two school

teams, celebrating their wins and supporting other schools to reach their markers. These new, connected relationships can be further deepened with chances to increase skill development through professional learning opportunities that twinned schools attend together. Data gathered in the Awakening stage will better inform the determination of the significant milestones to be celebrated for various employee groups.

Communication for Institutionalization

To ensure that change is institutionalized, all schools will become involved in the use of the Safe and Supporting Schools Change Vision (see Appendix R). Communication at this stage will occur through more formalized processes such as School Improvement Planning. This school-based focus on and communication of performance tracking will ensure that schools are committing to the use of new lenses, equity mindsets, and the knowledge, processes, and practices that go along with the new learning. This will be communicated to every individual who walks into a RRDSB school building by the culture and climate that supports and includes, not punishes and excludes, every student in the school community. Communication to parent and community that naturally messages a culture of inclusion and collaborative care will be the goal of communication during the Institutionalization phase.

The Cawsey et al.'s (2016) Change Path Model guides the Implementation, Monitoring, Evaluation, and Communication for the change plan. By honouring the social justice focus through evidence-based practices for students presenting with challenging behaviours, a transformative leadership approach fits well. Monitoring and evaluating using a CBAM (Hord et al, 1987) allows opportunities for adaptive and authentic leadership to be executed by the CF.

Next Steps and Future Considerations

The next steps for this OIP depend on a number of factors. These include fiscal constraints, human resources processes, leadership planning, and willingness to adopt a vision that shifts mindset. One of the areas of consideration in the next steps is a budgetary one. The continuation of the central CF and SSC team structure, in collaboration with the mental health lead and Special Education Department may not continue beyond the life of the change plan. In that case, the CF role could be collapsed into another system-level administrator role to monitor the Institutionalization as schools develop independence.

Another consideration would be the accountability and leadership for SSCs in schools. Much of this plan relies on the refining of their current skills, their development of new strategies, their capacity to coach educators, and their ability to become an integral member of the school team. There is a large group of SSCs in the Board and they are not housed under the auspices of the Special Education Department. Instead, they reside within the Mental Health and Well-Being Department. With the emphasis on streamlining processes, such as behaviour improvement plans, individual education plans, and functional behaviour assessments, there is a better alignment with the Special Education Department. The lead who is currently overseeing SSCs has a mental health skillset and adding the special education processes, practices, and paperwork to that person's portfolio would not be reasonable. A way to manage this gap would need to be considered. Along the same lines is exploration of a way to remove hard lines between departments. This is already happening with the data gathering phase of this OIP shared between the special education and the mental health and well-being portfolios. A next step would be that the Curriculum Department participates in dialogue with Special Education and Mental Health and Well-Being Departments in order to include best practices from these areas when

supporting educators reaching out to that department. How this might look and the mechanisms to support this would need to be investigated.

A barrier to a shift in educator mindset for this OIP is the fact that staff tend to be wary of an increase in positions at a central level. Staff have been heard to express concern about the value of these roles and their concern that these roles do not contribute in a direct, frontline fashion to the work of the educators who are overwhelmed in classrooms. Being centrally staffed cannot mean being removed from the struggles that are happening in schools. If the system suggests it is approaching student behaviour through different lenses, it must check its own processes. For example, a behaviour plan with a checklist of retroactive, punitive, exclusionary responses to behaviour must be changed. These inconsistencies hurt the word-deed alignment (Simons, 2002) and the leadership *walk the talk* trust (Weick, 1995).

It would be imperative that the impact of the change be felt directly by staff and that those in central positions engage actively in schools and communicate those engagements widely within the Board. In-school staff must feel genuinely supported in their learning and their growth. Drawing from the Social Discipline Window (Costello et al., 2010) so foundational to relationship-based restorative practices, educators need to feel that building new learning is being done *with* them instead of *to* them. The change process is not one of discipline, but it can be viewed as one of conflict when new people, positions, and processes arrive to engage with educators and teams. Just as it is difficult for our students to be vulnerable and embrace support when they feel they are being punished and shamed, so too is it difficult for educators to feel supported when they sense they are being told their work is not good enough. Instead, the learning needs to be done together using reflection and responsive modifications in small PDSA cycles. The work is about best practices and being better together with ongoing evaluation of the

progress through a CBAM. This models for educators that it is important to hear and value every voice, for children and for adults.

The OIP begins from a place of wanting to understand a need. The first phase is about gathering information, understanding the wants, and listening to the voices. Year One is about completing multiple mini-PDSAs in target buildings while strengthening in-school teams, learning together with a central member of the SSC employee group, and completing the learning cycles instead of delivering something and walking away. Year Two applies the learning from all of the school-based PDSAs to create an improved system-level response, engaged and active in school teams, to promote an institutionalized change. Sincere, collaborative communication with multiple stakeholders, at all stages along the Change Path Model (Cawsey et al., 2016), is imperative for the kind of transformative change recommended for this social justice guided OIP.

Conclusion

Students who are already marginalized by factors, such as socioeconomic status, trauma, ethnicity, culture, or special education needs who also present with challenging behaviours are further marginalized in schools when they are excluded and punished. These practices have been perpetuated in schools due to the culture of power exercised, often unwittingly, by those in privileged positions (Delpit, 1988) making this a PoP of a social justice nature (Shields, 2010; Weiner, 2003). Considering the emotional nature of the mindset shift that is required to modify practice, an implementation process that recognizes the value of working *with* individuals in an authentic manner is required. Leading adaptively to create safe holding spaces when facing technical challenges will ensure socially just change of a transformative nature (Shields, 2018; Weiner, 2003). This OIP recognizes that successful educator change must be facilitated in a manner that models the approach for students—a consideration of culture, concerns, and existing realities that informs a safe and supporting approach toward growth.

The timeliness of this OIP cannot be overstated. In addition to the concerns around challenging behaviour and mental well-being raised by educators and unions prior to 2020 (RRDSB, 2018a, 2019a, 2019b; Santor, 2019), the COVID-19 experience has added to the emergent nature of this need. After over one year in various forms of lockdown at the time of finalizing this OIP, some of our families most in need of support have experienced considerable impact financially, socially, academically, and in the area of mental health. When we welcome these students and families back to consistent, face-to-face education, they will be returning with social and academic gaps, and possible trauma. We cannot welcome them back with exclusion and punishment. If now is not the right time to make the investment in this change, I fear there will never be a right time.

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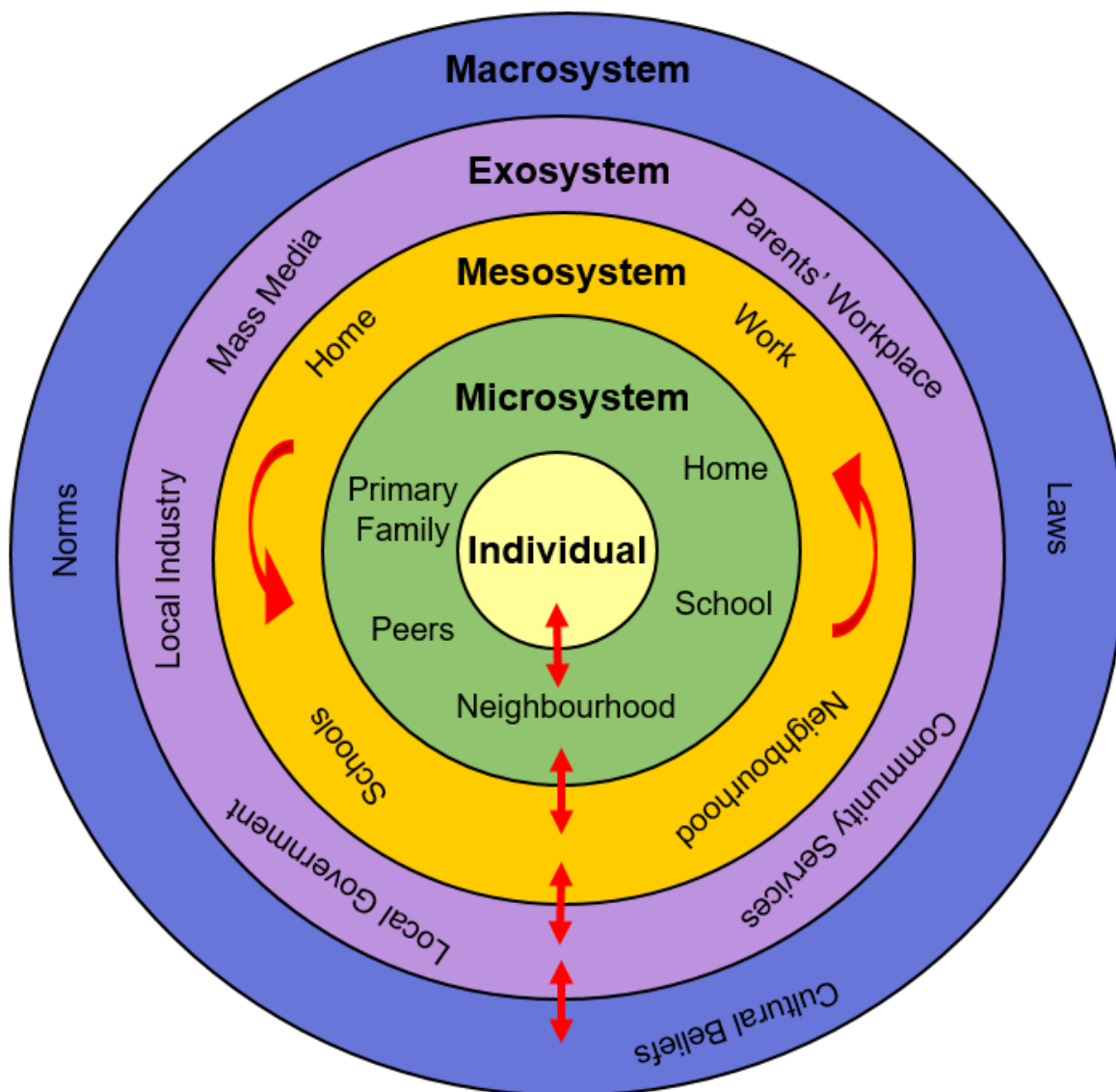
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Appendix A

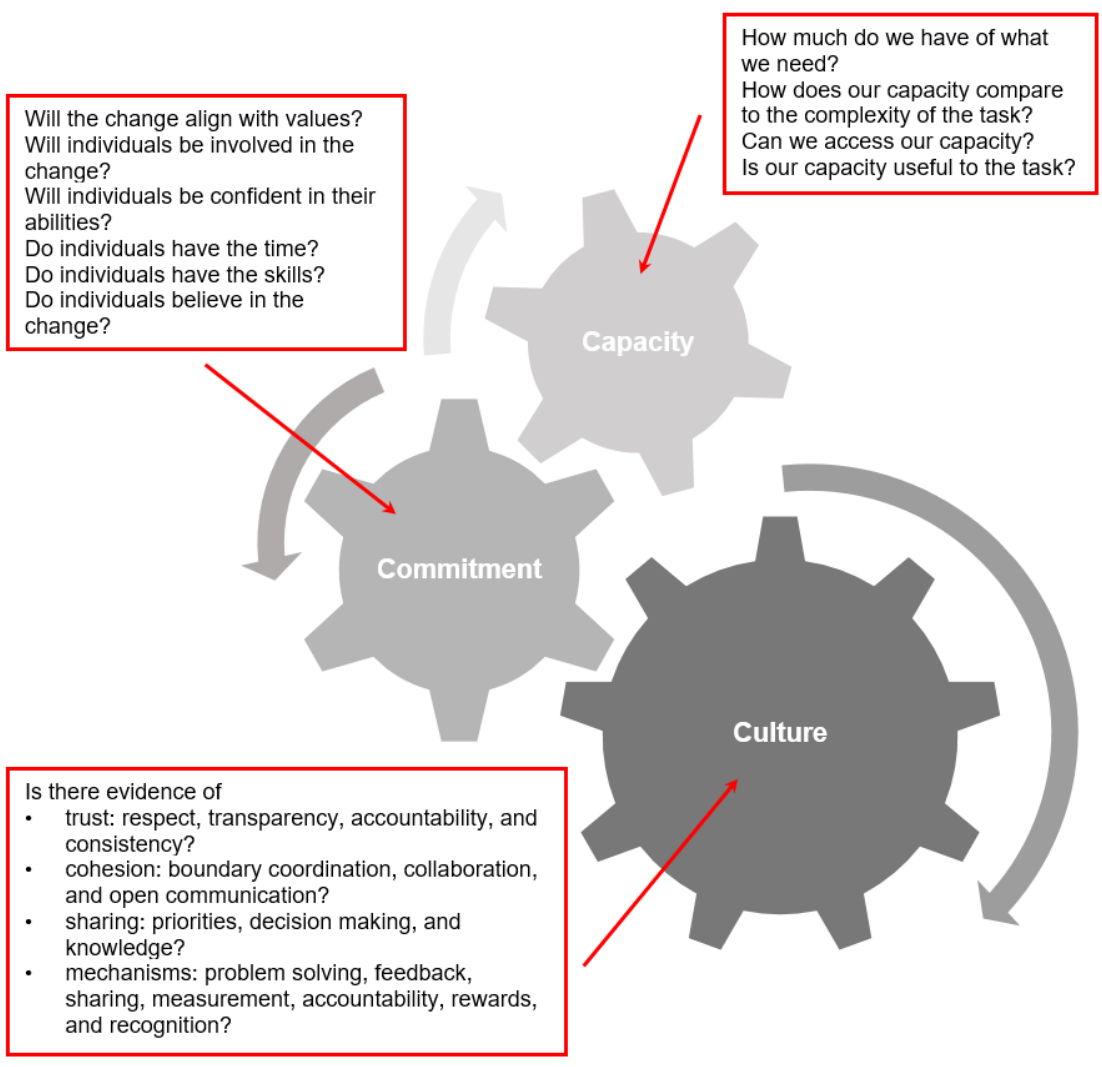
Bronfenbrenner's (1977) Ecological Systems Theory



Note. Adapted from *Bioecological Model*, by Psychology Wiki, 2021, (https://psychology.wikia.org/wiki/Bioecological_model).

Appendix B

Combe's (2014) Change Inventory Based on the Interlocking Drivers of Change



Note. Adapted from “Change Readiness: Focusing Change Management Where it Counts,” by M. Combe, 2014, *Project Management Institute*, 7, p. 4.

Appendix C

Shield's (2018) Eight Tenets and Their Connection to the OIP

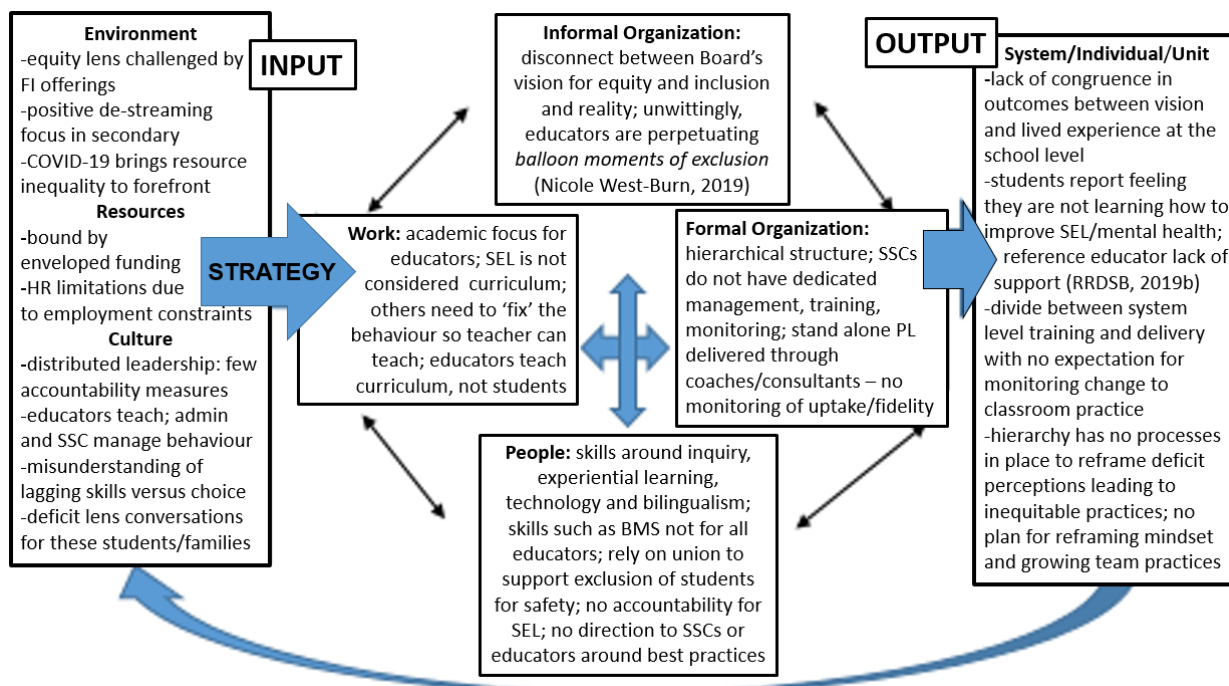
Tenets	Connection to OIP
1. Deep and equitable change	<ul style="list-style-type: none"> • A commitment to explore deficit views and recognize marginalization where it may have been previously unrecognized due to educator lenses of privilege
2. Deconstruct and reconstruct knowledge frameworks that perpetuate inequity and injustice	<ul style="list-style-type: none"> • Reject deficit thinking that blames the victim and recognize pathologizing practices in classrooms and schools. • Reject “fixing” the child and their family and instead become willing to teach/react/support differently • Reinvent marginalizing structures (punitive responses to challenging behaviour) • Engage in difficult conversations to promote more inclusive thinking
3. Address the inequitable distribution of power	<ul style="list-style-type: none"> • Recognize that school reflects for some a culture of power (Delpit, 1988) where the rules for participating in the power seem hidden (ways of communicating, behaving, and presenting to others) • Recognize that those able to resolve issues are those with power (educators) and invest in structures that share that power with those affected (students) • Use power positively to ensure that all students are receiving what they need, not just those using culturally appropriate ways to ask for it
4. Promote both private and public good	<ul style="list-style-type: none"> • Relationships that cultivate a sense of belonging and safety are the key to developing the capacity of individual students for private good and ultimately public good • Relationships build trust, which builds community, which benefits both private and public good • Engage in dialogue that permits growth because it respects differences; including two way dialogue with parents and community
5. Focus on emancipation, democracy, equity, and justice	<ul style="list-style-type: none"> • Provide a safe space for all students to bring the totality of their lived experiences,

	<p>perspectives and ideas into the classroom— socioeconomic, cultural, and experiential</p> <ul style="list-style-type: none"> • Consider classroom curriculum as conversations that make sense of the world where every student is an expert on their lived experiences
6. Emphasis on interdependence, interconnectedness, and global awareness	<ul style="list-style-type: none"> • Be willing to expand the understanding of what is of value and normal, based on the understanding that we are looking through a lens of the middle-class culture, values, beliefs, and practices
7. Balance critique and promise	<ul style="list-style-type: none"> • Be explicit about the inequities, but also be as active in the critique as in the promise; build bridges to solutions
8. Exhibit Moral Courage	<ul style="list-style-type: none"> • Instead of achievement gap, continue to focus on opportunity gap and empowerment gap • Use courageous and persistent dialogue • Don't blame children or their families; take collective responsibility for every child's success

Note. Adapted from *Transformative Leadership in Education: Equitable and Socially Just Change in an Uncertain and Complex World* (2nd ed., p. 21), by C. M. Shields, 2018, Routledge.

Appendix D

Nadler and Tushman's (1989) Congruence Model Applied to RRDSB



Note. Adapted from *Organizational Change: An Action-Oriented Toolkit* (3rd ed., p. 69), by T. F. Cawsey, G. Deszca, and C. Ingols, 2016, Sage.

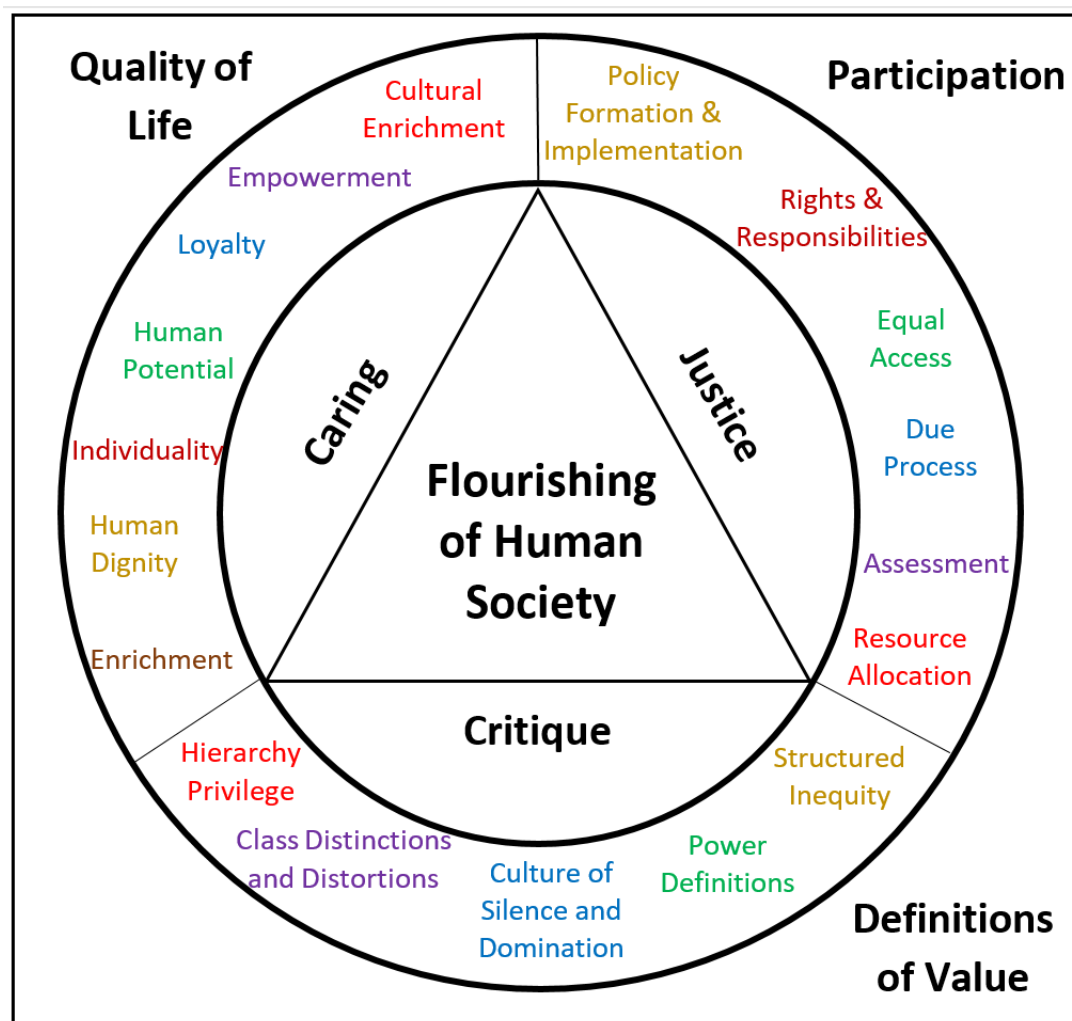
Appendix E

All Solutions Measured Against the Non-Negotiables

Three Solution Criteria/Conditions Comparison	#1		#2		#3	
	Yes	No	Yes	No	Yes	No
Does the Solution...						
Require reasonable modification of resource allocation	X		X		X	
Address educator perception		X		X	X	
Develop educator skills and strategies		X		X	X	
Strengthen educator-student relationships	X			X	X	
Reduce offloading of student behaviour to admin/SSC		X		X	X	
Reflect an ecological perspective		X		X	X	
Build connection and consistency between schools		X		X	X	
Provide tracking and accountability		X		X	X	
Consider voices of those supported (students)		X	X		X	
Consider voices of those supporting (educators)	X			X	X	

Appendix F

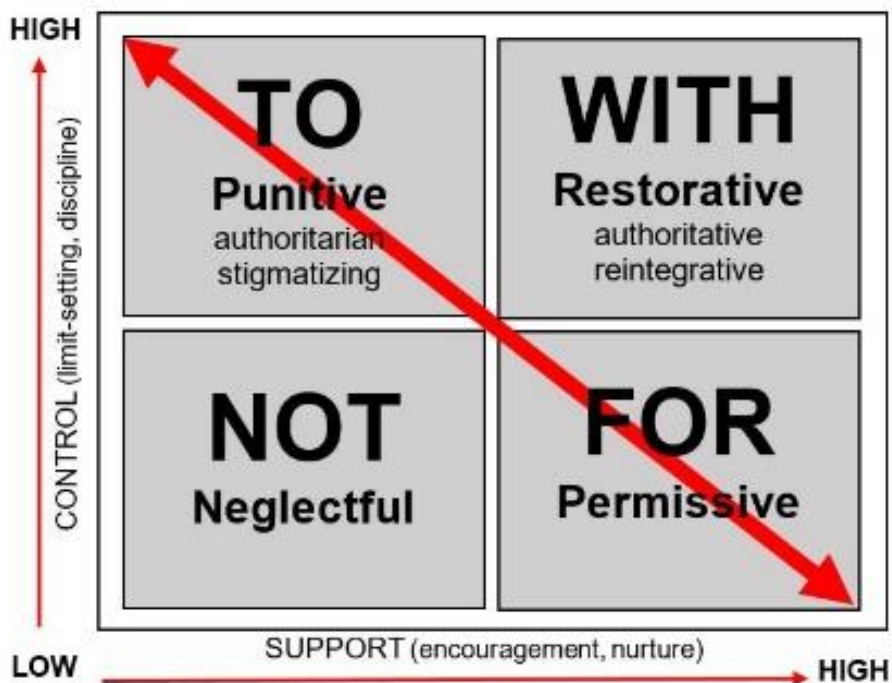
Starratt's (2012) Ethics of Justice, Critique, and Care



Note. Adapted from *Cultivating an Ethical School* (p. 54), by R. Starratt, 2012, Routledge.

Appendix G

The Social Discipline Window (Wachtel, 1999)



Note. Adapted from *Safer Saner Schools: Restoring Community in a Disconnected World*, by Wachtel, 1999, IIRP Graduate School (<https://www.iirp.edu/news/safersanerschools-restoring-community-in-a-disconnected-world>).

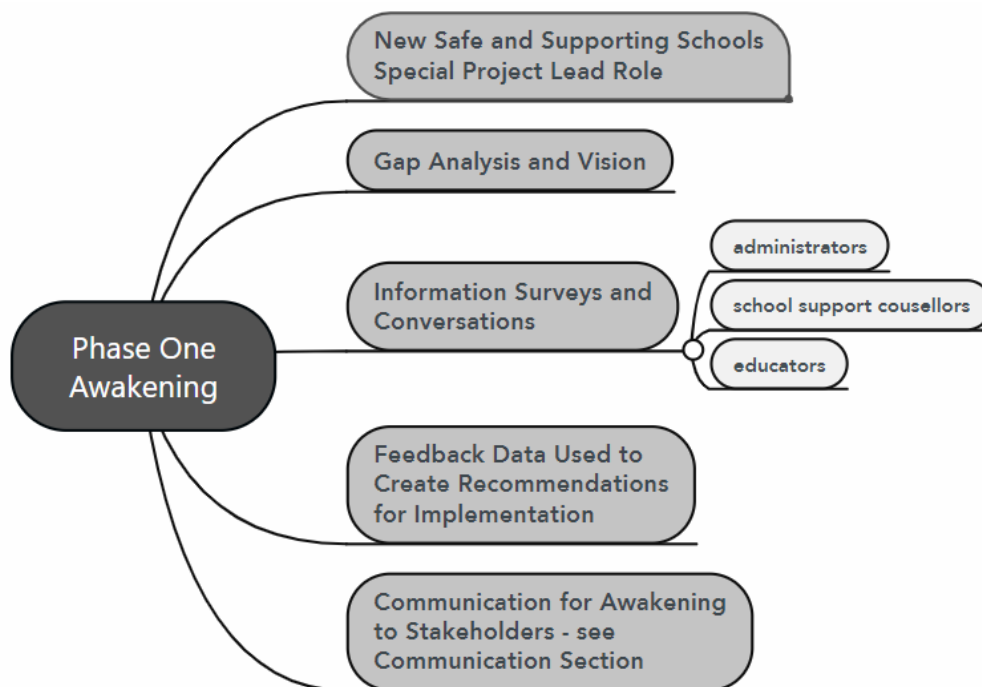
Appendix H

The Gap Between Current and Future State

Current Mission and Culture	Future Mission and Culture
<ul style="list-style-type: none">• Increase in student challenging and interfering behaviours• Reactive and punitive responses offloaded to SSCs and administrators• Lack of educator understanding of growing field of knowledge around student behaviour and learning• Weak student-educator attachments for students who exhibit chronic challenging behaviour	<ul style="list-style-type: none">• Trauma-sensitive• Safe and supportive• Proactive and collaborative• Restorative• Relationally connected• Grounded in research

Appendix I

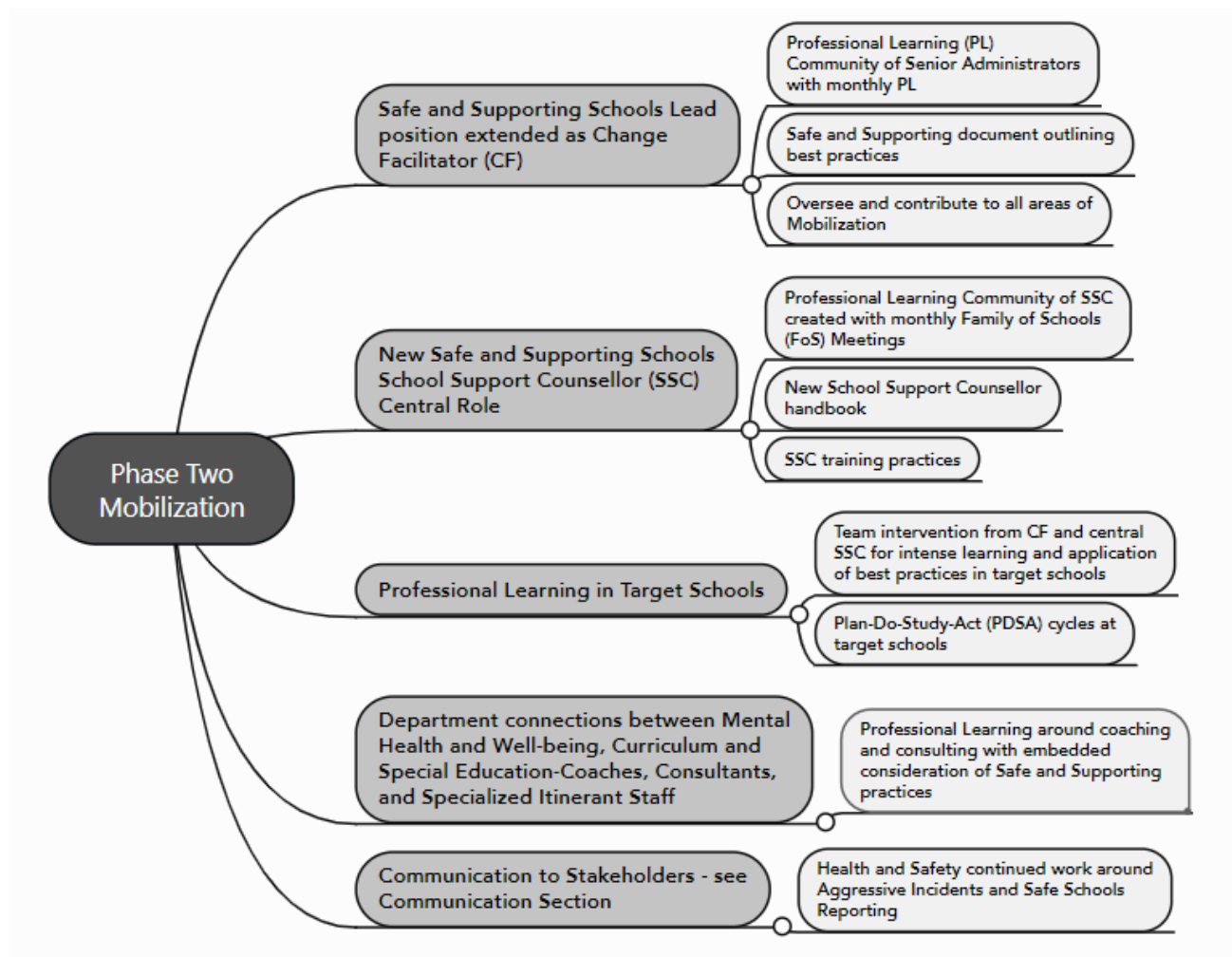
Phase One of Implementation: Awakening



Note. Adapted from *Organizational Change: An Action-Oriented Toolkit* (3rd ed., p. 55), by T. F. Cawsey, G. Deszca, and C. Ingols, 2016, Sage.

Appendix J

Phase Two of Implementation: Mobilization



Note. Adapted from *Organizational Change: An Action-Oriented Toolkit* (3rd ed., p. 55), by T. F. Cawsey, G. Deszca, and C. Ingols, 2016, Sage.

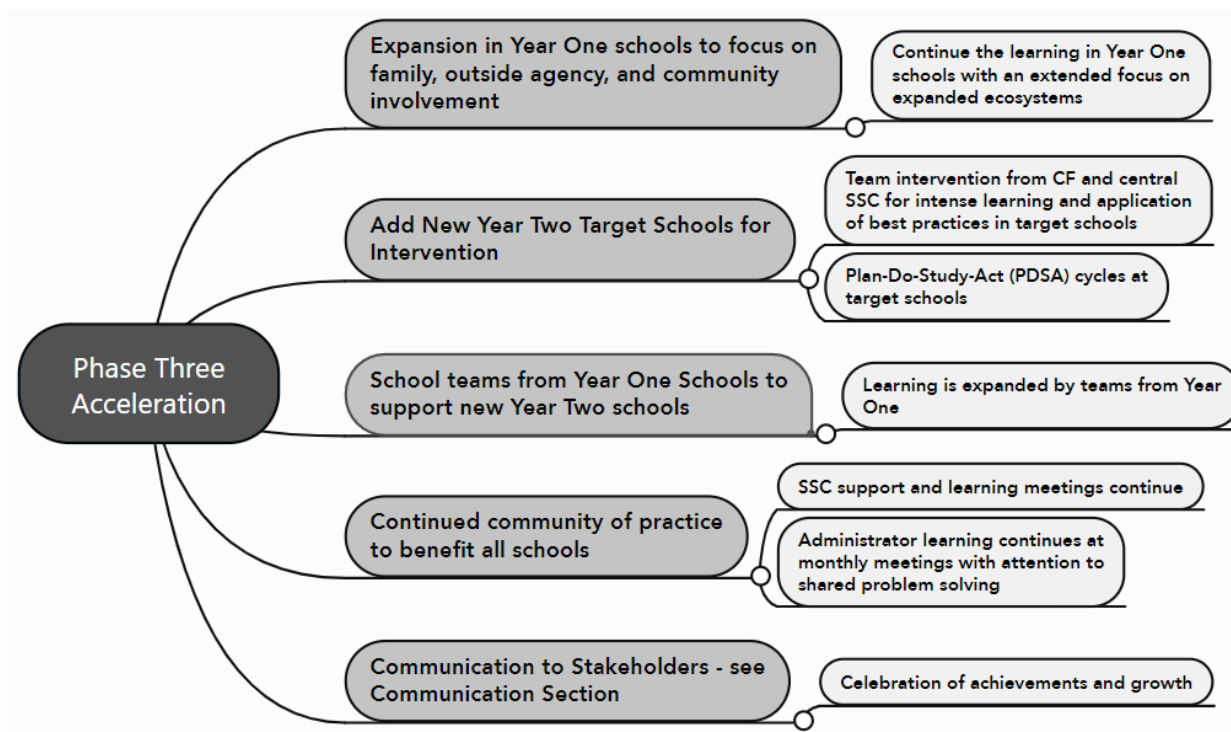
Appendix K

Mind Map of Best Practices



Appendix L

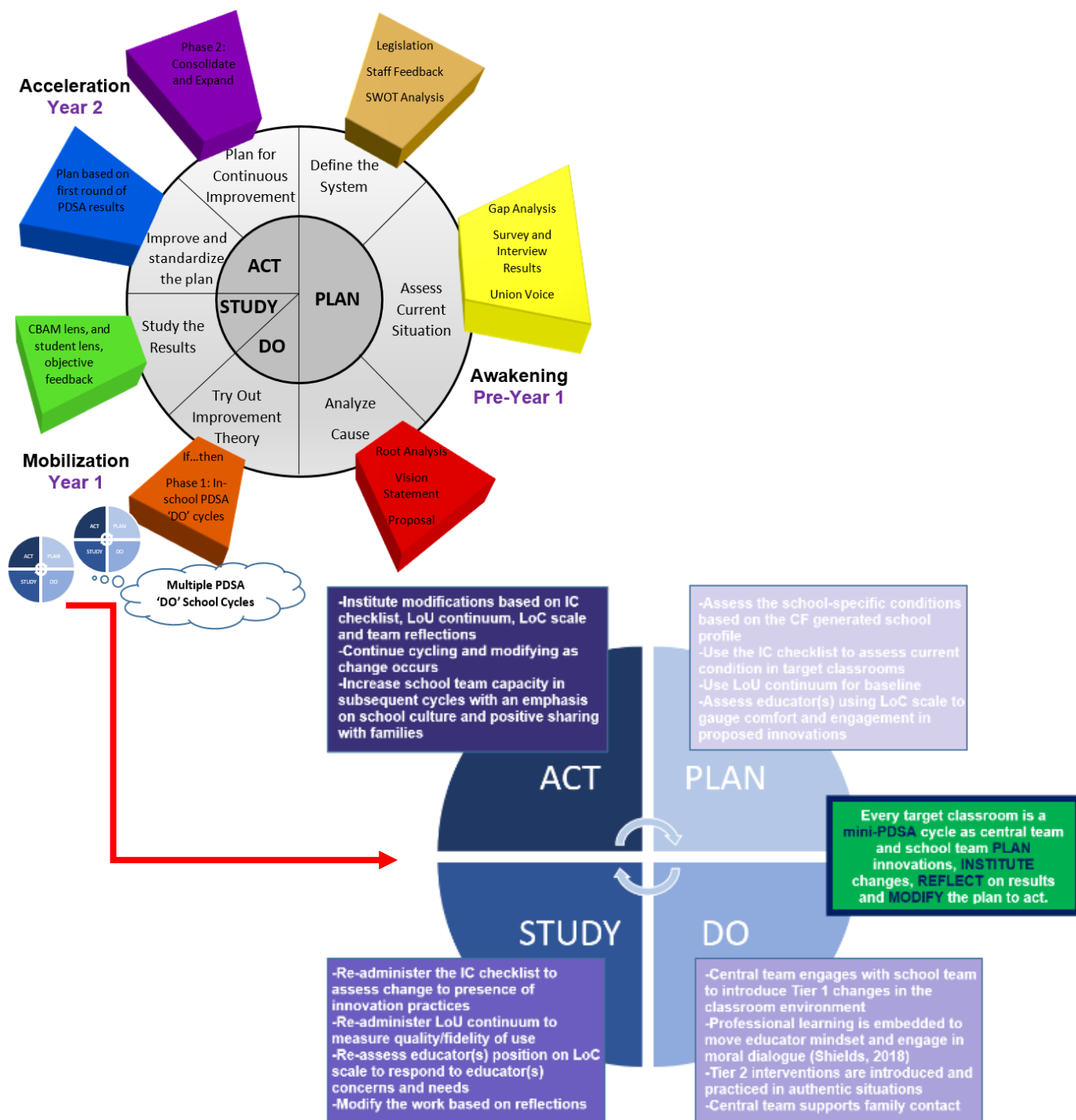
Phase Three of Implementation: Acceleration



Note. Adapted from *Organizational Change: An Action-Oriented Toolkit* (3rd ed., p. 55), by T. F. Cawsey, G. Deszca, and C. Ingols, 2016, Sage.

Appendix M

Board Level PDSA With the Change Path Model (Cawsey et al., 2016)



Note. Adapted from *Organizational Change: An Action-Oriented Toolkit* (3rd ed., p. 55), by T. F. Cawsey, G. Deszca, and C. Ingols, 2016, Sage.

Appendix N

Sample Innovation Configuration Map for a School/Class Visit

Configuration Innovation Map	
Configuration Innovations = Best Practices	
Component 1:	Orderly travel through the hallways
Component 2:	Individual greetings at the classroom door
Component 3:	Visuals to guide common classroom routines displayed
Component 4:	Classroom routine visuals explicitly referenced
Component 5:	Visuals to guide daily schedule displayed
Component 6:	Daily schedule visuals explicitly referenced
Component 7:	Visuals for classroom expectations displayed
Component 8:	Classroom expectations visuals explicitly referenced
Component 9:	Difficulties with classroom expectations consistently noticed and named
Component 10:	Purposeful classroom community jobs displayed
Component 11:	Learning skills explicitly taught
Component 12:	Learning skills remediated
Component 13:	Transitions supervised and supported with modeling and re-teaching
Component 14:	Calming routines used
Component 15:	Co-regulation techniques used
Component 16:	Rituals for connection used
Component 17:	Highly differentiated learning materials and demonstrations used
Component 18:	Discussions are about relationships, obligation, and repair
Component 19:	Conversations include the educator and the student voice
Component 20:	Problem solving is collaborative and proactive
Component 21:	Appropriate plans are executed for students in fight, flight, or freeze
Component 22:	Responses to students focus on safety, then connection, then learning
Component 23:	Conversations with parents focus on ways to work together to support

Note. Adapted from *Taking Charge of Change* (p. 20), by S. M. Hord, J. L. Rousin, and G. E. Hall, 1987, Association for Curriculum and Supervision Development.

Appendix O


Sample Levels of Use Tool for a School/Class Visit

Configuration Innovation Map with Levels of Use			
Configuration Innovations = Best Practices		Levels of Use = Level of Implementation	
Component 1: Orderly travel through the hallways			
<i>Always</i>	<i>Usually</i>	<i>Sometimes</i>	<i>Rarely</i>
Component 2: Individual greetings at the classroom door			
<i>Always</i>	<i>Usually</i>	<i>Sometimes</i>	<i>Rarely</i>
Component 3: Visuals to guide common classroom routines displayed			
<i>All</i>	<i>Many</i>	<i>Some</i>	<i>None</i>
Component 4: Classroom routine visuals explicitly referenced			
<i>Regularly</i>	<i>Often</i>	<i>Sometimes</i>	<i>Rarely</i>
Component 5: Visuals to guide daily schedule displayed			
<i>Detailed</i>	<i>General</i>	<i>Some detail</i>	<i>No Display</i>
Component 6: Daily schedule visuals explicitly referenced			
<i>Regularly</i>	<i>Often</i>	<i>Sometimes</i>	<i>Rarely</i>
Component 7: Visuals for classroom expectations displayed			
<i>All</i>	<i>Many</i>	<i>Some</i>	<i>None</i>
Component 8: Classroom expectations visuals explicitly referenced			
<i>Often</i>	<i>Regularly</i>	<i>Sometimes</i>	<i>Rarely</i>
Component 9: Difficulties with classroom expectations consistently noticed and named			
<i>Always</i>	<i>Usually</i>	<i>Sometimes</i>	<i>Rarely</i>

Note. Adapted from *Taking Charge of Change* (p. 20), by S. M. Hord, J. L. Rousin, and G. E. Hall, 1987, Association for Curriculum and Supervision Development.

Appendix P

Stages of Concern Scale: Typical Expressions of Concern About the Innovation

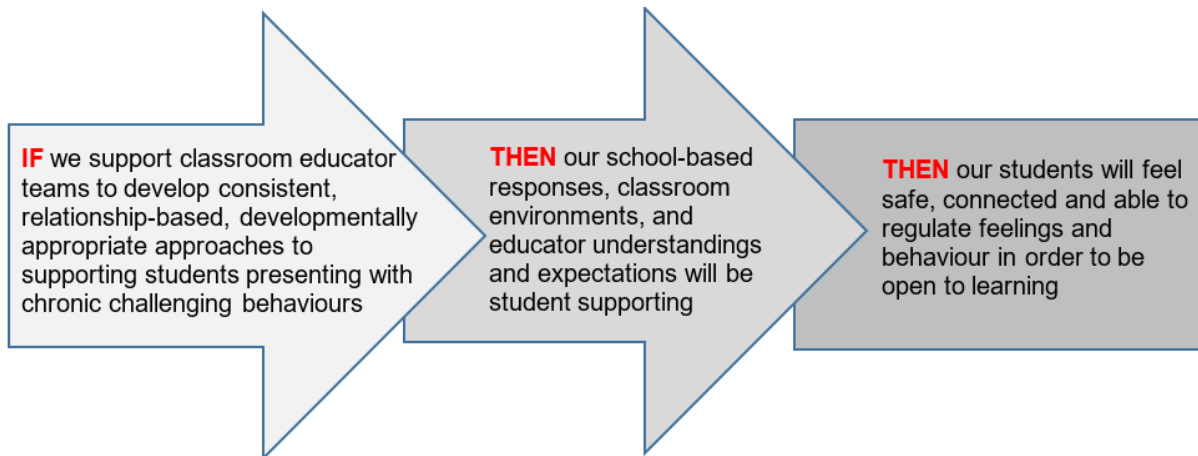
	Type of Concern	Stage of Concern	Expression of Concern
Impact		6 - Refocusing	I have some ideas about something that would work even better.
		5 - Collaboration	I am concerned about relating what I am doing with what other instructors are doing.
		4 - Consequence	How is my use affecting kids?
Task		3 - Management	I seem to be spending all of my time getting materials ready.
	Self	2 - Personal	How will using it affect me?
1 - Informational		I would like to know more about it.	
0 - Awareness		I am not concerned about it (the innovation).	

Note. Adapted from *Taking Charge of Change* (p. 31), by S. M. Hord, J. L. Rousin, and G. E. Hall, 1987, Association for Curriculum and Supervision Development.

Appendix Q

If-Then-Then statement

Five Why Root Analysis	What's Happening?	• Some students are experiencing frequent retroactive, exclusionary responses to chronic challenging behaviours.
	Why	• They are defying, arguing, running, hitting, or disrupting.
	Why	• They are overwhelmed, disregulated, and feel unsafe.
	Why	• They cannot manage when presented with expectations that outstrip their skill development
	Why	• Educators are not utilizing research-based, developmentally appropriate, relational approaches to support them.



Appendix R

Representation of the Change Vision

