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Cracking the shell of White fragility: Priming employees for anti-oppressive/anti-racist learning

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Abstract

Despite the adoption of AO/AR practice frameworks by most human service organizations, consistently integrating the practical elements of AO/AR work into professional interactions continues to challenge many organizations (deFinney, 2011; Saraceno, 2012). This OiP considers the barriers to AO/AR praxis for staff in a crisis shelter, drawing from relevant leadership theory, CRT, change management research, and education research to develop a comprehensive plan aimed at building capacity among employees. With a focus on diminishing the impulse to deny or refute the impacts of systems of oppression on racialized and equity seeking groups, this project uses Kolb and Frohman's model for planned change, and integrates Deszca et al.'s (2020) change path model with Gentile's (2010) giving voice to values curriculum, to offer an adaptable, agile solution to the PoP.

The desire to identify and address this problem is rooted in a transformational leadership approach that emphasizes the critical role of trusting and vulnerable leader-employee relationships. The social justice orientation and focus on research that is apparent in this project leverages elements of the transformative leadership approach in formulating a solution. Finally, the situational leadership approach supports the requisite adaptability and agility in engaging with this solution. In this OiP, these three leadership approaches are woven together to develop a comprehensive, AO/AR, guided learning program. Through ongoing PDSA cycles, pre- and post-training evaluation, and observational feedback, the iterative program will be tailored to support the specific needs of the partner organization.

Keywords: Anti-racism, Anti-oppression, Intersectionality, White Fragility, Employee Training, Resistance.

Executive Summary

Historically, welfare and social service agencies have been staffed by employees that lack demographic similarity to the clients they serve (Saraceno, 2012). Traditionally, the field of human services has consisted of majority White, middle-class women, many of whom lack shared lived experience with their more vulnerable clients (deFinney, 2011; Saraceno, 2012). As the field of human services has evolved from a social welfare model to a harm reduction practice framework, human service employees without lived experience of intersectional marginalization find themselves struggling to understand, support, and relate to their clients (deFinney, 2011). As the cultural consciousness shifts towards a more critical view of the criminal justice system and the disproportionately negative impact it has on Indigenous and Black people, many human service agencies have struggled to make sense of how their roles as helpers are impacted by racist and oppressive systems (Saraceno, 2012).

This organizational improvement plan explores the problem of reconciling professional helper identities with their position in various systems of oppression among employees at a crisis shelter. Chapter 1 examines the internal and external context at Home Base shelter, describing the considerable changes to the practice framework and organization in recent years. The Home Base shelter has a long-serving, relatively privileged, demographically homogenous culture, that operates from a constructivist, spiritual-frame. To this end, the group has a limited understanding of the corporeal contexts that shape the lives of their clients, and their strong identification with their role as helpers obfuscates their perception of their roles in various systems of oppression.

In my role as an externally contracted workplace investigator, I had the opportunity to develop a comprehensive understanding of the employee group and establish a trusting relationship with individual employees. Through the process of interviewing each employee at the shelter, a pattern emerged that indicated discomfort with, and resistance towards,

challenging conversations related to racism and oppression. Previous attempts by the organization to engage in anti-racist training were poorly received by the group, in part, because the content of the training challenged their identities as helpers and drew attention to ways in which they may be enacting racial harm upon their clients. In the vision for change, employees will develop their capacity to engage in reflexive practices and participate in challenging conversations related to racism and oppression so that they may deepen their understanding of how racism impacts their clients.

Chapter 2 presents the planning and development of this project. An integrated leadership approach that includes elements of transformational, transformative, and situational leadership is presented. The role of each leadership approach in propelling the project forward is also explained. Next, the change management framework is discussed, which is an amalgam of Kolb and Frohman's (1970) model for planned change and Deszca et al.'s (2020) change path model, supported by Gentile's (2010) giving voice to values curriculum. Each of these frameworks address the unique characteristics of the problem. Specifically, the model for planned change (Kolb & Frohman, 1970) honours my role as an external consultant and the relationship between myself and the client in implementing this change. Deszca et al.'s (2020) change path model focuses attention on the relationship between leaders and employees during a period of change. Used in concert with Gentile's (2010) giving voice to values curriculum, this approach places a necessary emphasis on the psychological needs of the employees while leading this change. Four possible solutions to the problem are also presented and evaluated. To this end, the development and implementation of a comprehensive, interactive, 8-week training program, resembling the format of a book club, and led by myself and the executive director, was determined to be the most appropriate and impactful solution to the problem. This solution incorporates evidence-based andragogy and critical race learning, with trusting and vulnerable stewardship by organizational leaders.

Chapter 3 explores the change implementation plan, with an emphasis on leading complex behavioural change and associated best practices for learning. Monitoring and evaluation of the change process is also presented, and the role of the PDSA model in supporting both elements is discussed. Communication strategies are also considered, with an emphasis on the role of collaborative communication, trust, and vulnerability. This organizational improvement plan concludes with consideration of next steps and plans for the future, noting the ongoing work of allyship, and the limited scope of this project.

Acknowledgements

Since starting this program, I left my job in PSE, moved, completed another professional designation program, and adopted a new person into my family (as well as two dogs and two cats), started my own business, managed some significant heart issues, was diagnosed with ASD, ran a half marathon, took up pottery, all while (single) parenting my pre-schooler-now-first-grader, and caring for my two chosen sisters, through a pandemic. At times, the weight has felt crushing, but I feel immense pride in having made it this far. In the words of Snoop Dogg, "I want to thank me for believing in me."

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I submit this work in recognition of the brilliant scholars that have authored much of the research used in this project; in particular, the BIPOC researchers who continue to lead important change in this area.

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Acronyms

AO/AR	Anti-Oppressive/Anti-Racist
BIPOC	Black, Indigenous, and People of Colour
CPM	Change Path Model (Deszca et al., 2020)
CRT	Critical Race Theory
DI	Direct Instruction
DV	Domestic Violence
ED	Executive Director
GVV	Giving Voice to Values (Gentile, 2010)
IAT	Implicit Attribution Testing
KM	Knowledge Mobilization
LM	Learning for Mastery
MPC	Model for Planned Change (Kolb & Frohman, 1970)
OIP	Organizational Improvement Plan
PoP	Problem of Practice
SL	Situational Leadership
TL	Transformational Leadership
TRC	Truth and Reconciliation Commission
VAW	Violence Against Women

Definitions

Anti-Oppressive: Anti-oppressive practice is an interdisciplinary approach to human services that is grounded in social justice. The approach challenges the practitioner to critically examine the power imbalances inherent in organizational structures within a larger sociocultural and political context with the aim of creating equity and building an environment free from discrimination (Strier, 2007).

Anti-Racist: Anti-racist practice is intended to counter both systemic racism and racial prejudice through conscious efforts and purposeful actions aimed at creating equity for racialized people (Sue et al., 2019). Anti-racism generally involves acknowledging one's privileges, working to understand and change personal racial biases, and confronting racist actions whether at a personal or systemic level (Sue et al., 2019).

Privilege: Refers to the unearned advantages, favours and benefits bestowed upon members of dominant groups to the detriment of equity-seeking groups (Leaven, 2003). Privilege operates on personal, interpersonal, cultural and institutional levels, and typically favours people who are: White, heterosexual, able-bodied, male, Christian, English-speaking, middle-aged, and middle class or above (Leaven, 2003). Privilege is often unacknowledged by these individuals, who may believe that any benefit they enjoy is earned (Leaven, 2003).

White-passing: A term that refers to the experience of racialized people with a light skin tone being perceived as White and benefiting from the unearned privilege of White identity (Lukasik & Berry, 2017). This phenomenon can be purposeful or inadvertent, and may involve the person distancing themself from their racialized community (Lukasik & Berry, 2017).

Workplace Assessment: A workplace assessment is a specialized service that involves observing, conducting interviews, reviewing documentation and trends in relation to a workplace, and reporting findings to improve the functionality of the workplace or culture (Sorensen et al., 2018).

Chapter 1: Introduction and Problem

Chapter 1 of my organizational improvement plan (OIP) will introduce my problem of practice (PoP) and examine the context within which the problem has developed. The historical, environmental, social, structural, and leadership contexts will be considered, with particular emphasis on the spiritually-framed lens through which the employees construct and interpret their reality. The guiding principles of the organization will be considered, including a description of the current state of the problem in relation to the desired outcome of this project.

I will explain my leadership position within the organization, including my own positionality, and voice. Guided by a situational leadership (SL) approach, I will incorporate the lenses of transformational (TL) and transformative leadership into my approach to deepen my understanding of the problem. As I build on my awareness of the PoP, I will draw from research on critical race theory (CRT) (Abrams & Moio, 2009; Constance-Huggins, 2019; Dixson & Lynn, 2013; Ladson-Billings & Tate, 1995; Miller, 2020) and White fragility (DiAngelo, 2011; DiAngelo, 2018) to develop a theoretical framework for the problem.

I will then discuss the challenges I anticipate in implementing this change, namely: employee resistance, the impact of previous unsuccessful change initiatives, the weight of paradigmatic change, and the reconstruction of reality. I will also consider change drivers in relation to my vision for change.

Finally, this chapter will conclude with an analysis of my project's results after applying Deszca et al.'s (2020) change readiness measure. I will compare those results with Kezar's (2018) readiness for change measure. At the end of this section, I will identify the areas of strength and opportunity based on these change readiness measures.

The Problem

Anti-oppressive (AO) practices refer to an interdisciplinary approach used in the helping professions to provide support for clients (Strier, 2007). Grounded in social justice, AO practices challenge the practitioner to critically examine the power imbalances inherent in organizational structures and within the larger sociocultural and political context, aiming to promote equity through the creation of an environment free from discrimination (Strier, 2007). Anti-racist (AR) practices work to counter both systemic racism and racial prejudice through conscious efforts and purposeful actions aimed at creating equity for racialized people (Sue et al., 2019). AR generally involves acknowledging one's privileges, working to understand and change personal racial biases, and confronting racist actions whether at a personal or systemic level (Sue et al, 2019). AO/AR practices are closely related to each other and offer frameworks that are increasingly relied upon in human service and support professions (Sue et al., 2019).

My PoP addresses the poor integration of AO/AR practices at the Home Base crisis shelter which serves women and children fleeing domestic violence (DV). These shelters are commonly referred to as violence against women (VAW) shelters. Over the past decade, Home Base has undergone significant changes in leadership, institutional practices, funding, client needs, and practice framework. As a result of these changes, the demographically homogenous shelter team is struggling to connect with the less privileged client group. Muchinsky (2000) identified that periods of protracted environmental change create a destabilizing effect on work groups, and Manning (2018) argued that such periods of sweeping change challenge a group's shared understanding of their professional roles and position within broader systems. These views were supported by an internal workplace assessment that I completed in relation to the dynamics at Home Base in 2020, which found that staff felt destabilized and uncertain about their professional roles and ability to support clients. They also reported feeling abused and wounded by previous attempts at training in AO/AR practices.

DiAngelo (2011, 2018), hooks (1997), Roediger (1998), and Sleeter (2017), highlight the tendency of groups towards resisting engagement in AO/AR change initiatives if the individuals within the group sense that the proposed change will challenge their identities or lead to a loss of some kind, including unacknowledged privilege. Organizational leaders have observed a strong resistance from Home Base staff during this period of change in relation to the adaptation and self-reflection that is foundational to AO/AR praxis. hooks (1997) and Roediger (1998) argue that insofar as the privileged continue to understand the lived experiences of marginalized people as a simplistic, monolithic reality, they lack the capacity to connect with or appreciate such groups. To this end, Home Base staff's defensiveness towards considering their own role in systems of oppression, is interfering with their ability to meaningfully engage in AO/AR practices despite organizational mandate. As a result, the quality of service provided at the shelter has faltered, and the confidence of shelter staff in their own self-efficacy has plummeted.

Organizational Context

In this section of the paper, the organizational context for my PoP will be outlined through discussion of the interconnected socio-political, economic, and cultural factors impacting this change. The organizational structure and leadership will be considered, and the theoretical frameworks that underpin the organization and its guiding principles will be described.

External Environmental and Historical Context

The VAW shelter system was founded in the late 1970s ([redacted] Association of Interval and Transition Houses, 2021), and founded on the premise of short stays, given that waitlists for affordable housing were 4 to 6 weeks at the time (Home Base, 2021). Since then, shifting political agendas have contributed to a significant decrease in the supply of affordable housing and other social services (Bradburn, 2018). As a result, the Home Base shelter has transformed into a long-term housing and support option for local women experiencing poverty

and marginalization (United Way [redacted], 2018). In the workplace assessment, shelter staff noted a significant uptick in the mental health needs, use of substances, length of stay, and involvement in street-level sex work among clients. Their observations are supported by other reports published by local community agencies (Public Health [redacted], 2020; United Way [redacted], 2018). Moreover, there has been a notable increase in the number of clients with identities that are racialized, refugee, and/or non-English speaking (United Way [redacted], 2018). These intersecting marginalized identities have contributed to a level of disenfranchisement and poverty among clients that was previously inconceivable to shelter staff. Additionally, these new challenges have resulted in significant financial burden for the organization, forcing it to expand its practice framework and the services offered to clients.

As our social consciousness has shifted towards a deeper understanding of police and state violence against Black, Indigenous, and People of Colour (BIPOC) (Sandiford, 2020; Sinitiere & Cameron, 2021; Taylor & Davis, 2021), the traditionally cooperative relationships between Home Base and local policing agencies are being reconsidered. Social movements like #BlackLivesMatter have challenged social service agencies to find ways of supporting marginalized clients through AO/AR practices without relying on partnerships with the police (Beinhart, 2020; Social Work License Map, 2020). To this end, determining how to support women who have been victims of criminal acts while minimizing reliance on the criminal justice system has posed further challenges to the shelter team.

Organizational Structure and Leadership

The organizational structure at Home Base is hierarchical, led by an executive director (ED) who is appointed by a board of directors. She oversees multiple social service programs, one of which is the Home Base Shelter. She has two directors reporting to her, including the director of client services who oversees the shelter and shelter manager. All shelter staff report to the shelter manager; however, the ED makes a consistent effort to meaningfully engage with

all employees in the organization on a regular basis, an effort that has been well-received. The ED makes most of the significant and impactful decisions for the organization under the guidance of a board of directors. I am an independent contractor who has done extensive human resource consulting with the organization, including a workplace assessment in 2020 that uncovered this PoP.

Bass (1999), Burns (2004), and Calnin (2015) describe the TL approach as one that engages staff in a manner that inspires them, rebuilds their commitment to the organization, and re-focuses employees on their shared moral purpose, all while challenging them to continue to evolve within the organization. Over the past two years, since the ED was appointed, the leadership approach used at the shelter and within the broader organization aligns with this description of TL. DiFranza (2019) argues that TL inspires employees to pursue professional goals that unite the group and engage in a shared commitment to enact the organization's mission and vision. Thus, TL offers a helpful framework for engaging with this PoP, and it aligns well with the goals of this project.

As an external consultant working with the organization, I enjoy a strong, generative relationship with organizational leaders; I have completed work for them on multiple complex projects, and through this work, developed a collaborative and productive relationship. I have been offered latitude in developing and implementing an improvement plan that addresses the PoP for my OIP. Welton et al. (2018) emphasize the important role of leaders in supporting AO/AR change, noting that respected leaders enjoy greater trust and buy-in from employees than external educators. They argue that by engaging in AO/AR teaching, leaders can support their employees in working together to co-create their own understanding of context-specific AO/AR practice (Welton et al., 2018). The ED is very supportive of this initiative and has agreed to co-facilitate the project with me.

I consider my personal leadership style to be TL with elements of transformative leadership, since my work is grounded in social justice and draws heavily on research related to change resistance and reflexivity, particularly as it pertains to AR learning. Based on the prior workplace assessment, I expect that the social justice lens that underpins this project will challenge the shelter staff and generate some degree of resistance to the message being presented. It is my hope that this OIP will provide concrete strategies to overcome such resistance and usher the shelter staff into a state of receptivity that will allow for further, ongoing learning/unlearning/relearning (construction/deconstruction/reconstruction) of AO/AR practices and principles such that their professional worldview is recreated with a foundational social justice lens.

Internal Environmental Context

Berger and Luckmann (1966), Normore (2008), and Olou (2018) argue that demographically homogenous, constructivist groups demonstrate greater resistance to messaging that challenges their shared understanding when compared to more culturally diverse teams. As with many human service agencies (deFinney, 2011; Saraceno, 2012), the internal demographic of staff working at Home Base indicates strong homogeneity, all members of the team are either White or White-passing, women, aged 35 to 65 with strong leanings towards the Christian faith. In addition, many staff members have occupied their position for more than fifteen years and earn an annual salary on par with the median national income. Despite their similarities in race, gender, sexuality, and religious traditions, the group members perceive themselves to be highly diverse, attributing this to their different areas of formal education which they believe broadens their expertise.

Gutierrez and Unzueta (2010) define the concept of racial colour-blindness as the belief that people should be judged as individuals, with no importance placed on racial and ethnic differences. CRT scholars argue that this perspective fails to acknowledge the myriad ways in

which racism impacts the lived experiences of racialized people, and incorrectly understands racism and discrimination as individual acts rather than systemic in nature (Hill Collins, 2019; Mazzocco, 2017). The shared perception among shelter staff that their team was highly diverse, despite their lack of racial, cultural, or religious diversity, reflects elements of racial colourblindness and suggests a critical lack of awareness related to the experiences of marginalized and equity-seeking groups.

Zohar & Marshall (2000) describe spiritually-framed groups as constructivist cultures, typified by entwined relationships of personal and professional identity. This characteristic of spiritually-framed cultures is particularly aligned with the shelter staff group, as all employees share lived experience as survivors of DV, a composite identity that they also share with their client group. Spiritually-framed groups are common in human service organizations, and their satisfaction and engagement with their work is closely related to their connection with their clients and their perception of clients' success (Zohar, 2010; Zohar & Marshall, 2000). In recent years, due to the shift in support needs that have emerged in their client group, many workers have struggled to redefine the meaning of client success. Formerly, success had a more absolute definition; for example, a woman and her children safely transitioning into their own home away from their abuser. More recently, success has become defined through a harm reduction lens; for example, providing clients with sterile injection supplies for their drug consumption to prevent sharing or reusing needles. This shift has corelated with diminished employee engagement scores reported for the Home Base workplace ([Anonymous] personal communication, 2020).

Zohar and Marshall (2000) identified that spiritually-framed cultures are prone to manifesting dysfunction by refusing to acknowledge the "shadow" side of their work. They describe this concept as the (generally unintended) harm that takes place in conjunction with, or as a consequence of their work (Zohar & Marshall, 2010). Because such groups are so heavily

identified with a sense of moralistic goodness, they often resist or ignore messaging that

contradicts this belief, leaving them vulnerable to a rigid adherence to status quo (Zohar, 2010).

An example of the shadow side of VAW shelter work is the implicit harm caused by the

mandated systemic expectations, wherein vulnerable women are deprived of personal agency

in the interest of their own safety. For example, in order to access services, clients are expected

to abide to a curfew, report their whereabouts at all times, abstain from consumption of

substances, etc.

Spiritually-framed groups can be particularly resistant to change that challenges their

personal identities, and their alignment with religious doctrine may exacerbate this rigidity

(Zohar & Marshall, 2010). The organization has made multiple, previous unsuccessful attempts

to engage the shelter staff in reflexive AO/AR contemplation related to their work and

interactions with clients. However, the group is deeply committed to their understanding of

themselves as good, moral people, and have demonstrated an unwillingness to consider the

ways their role and industry perpetuates harm on the vulnerable people they support.

Home Base staff have constructed an understanding of their work as changing lives and

saving people from abusive dynamics. However, as the work of the shelter has transformed in

recent years to serve an increasingly diverse group of marginalized clients, the staff have

struggled in relating to them and identifying with their successes. As spiritually-framed

employees, their shared experience binds them to their work, and since their lived experience

no longer reflects that of their client group, they have become disoriented. An example of this

disconnection can be observed in a recent incident where a shelter employee called police

because a Black client was using a raised voice and swearing during a phone call in the

presence of her children. The client's behaviour did not meet the threshold for a complaint to

police, and the harm that police presence had on her and her children could have been

predicted if shelter staff were engaging in AO/AR practices. Moreover, it is unlikely that the

incident would have been understood as a public safety concern if the shelter staff had recognized their own anti-Black bias manifesting as fear during the interaction.

Organizational Guiding Principles

Home Base is run by an organization that identifies as being rooted in feminist ideology. Their mission is to support all women and their families in building a life free from violence, poverty, and oppression (Home Base website, 2021). The organizational vision is to see all women and children thriving- work that is rooted in the principles of AO/AR and intersectional feminism- using trauma-informed, person-centred practices that focus on harm reduction (Home Base website, 2021). Despite the symbolic commitment to AO/AR, the shelter has been unable to transition these principles into daily practice.

Considering the previous example of police being called to Home Base, and the broader negative response from shelter staff when engaging in AO/AR training, when reflecting upon the principles articulated in the organizational mission and vision, a gap emerges between the present and desired state of the shelter practices. The TL approach is identified as an effective means of engaging with spiritually-framed cultures, and supports institutional change rooted in social justice (Manning, 2018). Currently, the organization's guiding principles do not align with shelter practices and staff capacity. This OIP aims to bring shelter practices and staff capacity into alignment with the organization's expressed values using SL, TL, and transformative leadership approaches.

Leadership Positionality

In this section, I will discuss my agency, personal voice, and leadership lens for addressing my PoP. This section will provide insight into the critical role of strong relationships between employees and leaders in implementing this change, and how my own personal experiences and identities have situated me within this PoP.

Agency

Heifetz et al. (2009), remind us that leadership is more than simple authority; rather, strong leaders build relationships with their team members that allow for vulnerability and a willing trust, creating fertile ground for enacting change. As an external consultant working with the organization, I enjoy a strong working relationship with the senior leaders. I have been offered latitude in developing and implementing an OIP that addresses the PoP. The ED is highly supportive of this initiative and, ultimately, she will be responsible for approving the final plan.

Dutton and Heaphy (2003) identify high-quality connections as shared experiences between people where they were "felt and sensed, with lasting implications for the individual, and often for the organization" (p. 265). Such moments of connection allow the people involved to feel seen by the leader, promote feelings of psychological safety, and promote learning behaviours within organizations (Carmeli et al., 2009). In addition to my strong relationship with senior leaders, I also benefit from trusted connections with union leaders and Home Base shelter staff because of my interactions with them while completing the workplace assessment. Many of the recommendations that were made through the workplace assessment have been implemented, and shelter staff have noted that many of the improvements reflect concerns they shared with me during lengthy, emotional interviews.

Leader-member exchange (LMX) theory considers the quality of relationship between leaders and their employees (Scandura, 1999). LMX explains how the quality of these relationships interacts with leader behaviour to impact their employees' perception of justice and influences team member's attitudes and conduct (Moorman, 1991; Shore & Shore, 1995). LMX

positions the relationship between leaders and their employees as fundamentally dyadic, wherein each impacts and shapes the other's experiences and capacities (Moorman, 1991). Consideration of co-relational feelings of trust and reciprocity are foundational to LMX theory, and lead to social exchanges that are typified by loyalty, commitment, and support (Anand et al., 2011; Cropanzano et al., 2001; Dulebohn, et al., 2012). LMX theory describes the kind of relationships that the ED has developed with shelter staff. These connections will be critical in promoting a sense of safety within our learning environment.

Personal Voice

As a White, queer, disabled, single-parent to a mixed-race child, and caretaker for two young adults with developmental disabilities, I exist within and adjacent to many intersecting marginalized identities. At the same time, I benefit from: unearned privilege based on my skin colour, a recognized education and a degree of social influence. To this end, I feel a certain obligation to support the development of AO/AR praxis in my own work. As a workplace investigator, I am often hired following harmful human rights violations within the workplace. Despite the job security I am afforded through the ongoing perpetuation of such conduct, my personal ethics demand that I leverage my own privilege to prevent incidental harm and promote inclusion when possible.

The PoP I will be addressing through this OIP is a problem I have observed in many of my previous workplaces. In a prior role at a medium-sized, publicly-funded college, I was responsible for managing the departmental faculty and student experience in my eleven-program cluster. In response to a barrage of complaints from students, I organized a training series for the faculty that covered topics related to inclusive and AO/AR teaching practices that prioritized the needs and experiences of various marginalized groups. The topics included: human rights legislation, inclusive practices for trans students, Indigenous students, students with disabilities, AR teaching practices, and support for international students. The speakers

were well-received in general, however the AR speaker (a Black woman with considerable experience and impressive credentials) faced overt hostility from the group and was accused of "reverse racism" by several members of the faculty, some of whom stormed out of the room.

Initially, I was surprised by the divisive response to the training. Many participants voiced their discomfort with the session, pointing out that they felt victimized by the presenter and targeted as White people. Other faculty shared their disappointment and unease about the hostility their colleagues demonstrated towards the trainer and her message. Upon reflection, I came to understand that I had failed to grasp the important role that leaders play in priming the culture and audience for AR learning. Having formally engaged with AR learning during my graduate studies a decade prior, I took for granted that the faculty had a similar base of knowledge in the area. Following this failed attempt at change, I became increasingly interested in the role of privileged leaders in priming their team to ensure they are prepared and receptive to AR learning.

Since then, I have continued to observe an entrenched resistance among certain workplace cultures when faced with their own roles in upholding systems of oppression. DiAngelo (2011, 2018) and Manning (2018) found that among people who self-identify as good, moral, helpers, there is a particularly strong resistance to reflexive consideration of positionality in relation to racism. According to an internal assessment of the workplace dynamics, shelter staff are highly oriented towards their Christian faith, and deeply identify with the role of moralistic helpers. Staff have resisted attempts by the organization to align shelter practices with their AO/AR policy through training, and report that these efforts caused them to feel abused, shamed, and wounded by the sessions. Subsequently, staff have demonstrated an inability to integrate the training into the practical application of their work.

I believe that many organizations struggle with overcoming resistance to anti-racist paradigms, and the pathway towards reconciling the gap between perceived allyship and true

reflexivity is fraught with challenges. This belief is supported by tomes of research focusing on decolonizing organizations and dismantling White supremacist systems (Arday & Mirza 2018; DiAngelo, 2011, 2018; Libesman, 2014; Olou, 2018; Sleeter, 2017; Twumasi, et al., 2020; Waites, 2017). Unfortunately, few organizations dedicate sufficient time or resources to developing sustainable programming that will work through the resistance (Twumasi et al., 2020).

Leadership Lens

In my role as a Human Resources Consultant and Workplace Investigator, my leadership approach is broadly described as situational, in that I am required to demonstrate a degree of flexibility and agility in response to the people and circumstances I am contracted to work with (Hersey & Blanchard, 1969). Situational leaders engage in a combination of directing, coaching, supporting, and delegating, based on the circumstances (Blanchard et al., 2013). For this OIP, I will be coaching and supporting the ED and shelter team as they work to overcome their resistance to AO/AR learning.

Creswell (2014) and Shields (2018) describe transformative leadership as an approach that engages in research inquiry that forms the critical foundation for the development of socially just political change. At a higher level, my leadership lens for this project includes elements of transformative leadership. This OIP is viewed through a social justice lens, drawing heavily on literature related to reflexivity and resistance to change, particularly in connection with AO/AR learning and change.

Elements of situational and transformative leadership will help drive the TL approach that underpins this project. These approaches complement each other, guiding the practical elements of my OIP. In particular, a transformative leadership approach plays a critical role in the research and development of this project, and a SL approach will be key to executing the initiative. The TL approach guides the project more broadly, it is through the TL practice within

the organization that the PoP was identified and a commitment was made to address it. Incorporating these three complimentary leadership theories into the interpretation of my PoP will support a more fulsome understanding of the dynamics at work.

Leadership Problem of Practice

My PoP relates to the poor integration of AO/AR practices at a crisis shelter that serves women and children fleeing DV. Over the past decade, Home Base has undergone significant changes in leadership, institutional practices, funding, client needs, and practice framework. Manning (2018) and Muchinsky (2000) point out that imposed changes can lead to a destabilized, fearful, and change resistant workplace culture. The changes imposed upon Home Base staff have transformed their job expectations and contributed to a sense of destabilization among the group.

These changes have also challenged their shared understanding about their roles within Home Base and their positions within various systems of oppression. Leaders have observed a fear-based resistance to the change and self-reflection necessary to institutionalize AO/AR practices among Home Base staff. This resistance has manifested most apparently when the shelter team participated in AR training sessions. "White fragility" is defined by DiAngelo (2011, 2018) as a defensive response to racial stress that manifests in White people through the display of emotions including fear, anger, and guilt, and other behaviours, including argumentation, silence, and flight. The White fragility apparent in shelter staff responses to AR training is contributing to a limited and problematic understanding of the lived experience of racialized clients. hooks, (1997), Roediger (1998), and Sleeter (2017) argue that human service professionals lacking a nuanced understanding of the experiences of racialized communities reinforce the harm caused by racist structures, many of which have contributed to their need to access the shelter system in the first place.

Crenshaw (1991), introduced the concept of intersectionality, a term describing the interconnectedness of social categories including race, class, gender, ability, and interrogating the ways these overlapping identities drive systems of discrimination or disadvantage. Since then, CRT scholars have integrated an intersectional lens into all elements of AO/AR practice (Cho et al., 2013; Crenshaw, 2019; Crenshaw et al., 1995; Hill Collins, 2019; Keenan et al., 2021). Socio-economic shifts in our society have led to notable changes in Home Base's client group, a population of increasingly racialized, impoverished, mentally unwell women and children. As a result of these changes, the homogenous and privileged shelter team is struggling to connect with their clients and provide meaningful support.

Critical counter narratives leverage personal accounts of lived experience to deconstruct racist beliefs (Miller, 2020). By exposing the audience to nuanced and humanizing experiences of racialized people, non-Black learners have an opportunity to develop a multifaceted understanding of the impact of racism on the daily lives of racialized people. Critical race theorists (Abrams & Moio, 2009; Constance-Huggins, 2019; Dixson & Lynn, 2013; Ladson-Billings & Tate., 1995; Miller, 2020) suggest that AR training is strengthened through the use of critical counter narratives. In 2016, the organization ratified an AO/AR policy that outlined expectations for service provision. To support this change, the organization hired professional AO/AR educators to engage in training with shelter staff, using critical counter narratives and a critical race framework. The training was poorly received by shelter staff who demonstrated a defensive resistance to the subject matter and hostility towards the trainer. As a result, additional attempts at training were put on hold.

DiAngelo (2011, 2018) argues that this kind of resistance to AR paradigms forces Black people to do the difficult work of interpreting and presenting information about racism in a manner that is more palatable to White audiences. These White audiences can then remain passive recipients of AR concepts, absent any personal investment or drive to change

(DiAngelo, 2011, 2018). In contemplating this PoP, I have become increasingly interested in the role that privileged organizational leaders might assume in priming or preparing White audiences for AR learning to lighten the burden of hostility for racialized educators.

As a spiritually-framed culture, Home Base staff thrive on meaningful relationships with their clients, a connection that had traditionally occurred via their demographic similarities and the lived experiences they shared as survivors of DV. Now, lacking the natural common ground they once relied upon, the group has continued to resist the opportunity to develop their capacity to engage in alternate means of understanding. Instead, the group remains trapped in a fear-based resistance to foundational elements of AO/AR learning, unaware of the extent to which this resistance is interfering with their own professional responsibilities and satisfaction.

Bell (1987) suggests that White people will only work towards advancing the interests of BIPOC when they converge with and further White interests. In 2020, the level of employee engagement reported through the employee engagement survey, found that the shelter staff team was more than fifteen percentage points lower than every other department within the organization based on averaged results (Anonymous, personal communication, June 9, 2020). Sleeter (2017), argues that unless interest convergence can be established between White service providers and BIPOC, no amount of critical race training will result in discernable change. In the context of the shelter, it is critical that the group is given an opportunity to connect their own desire for success and engagement within their roles, with the implementation of meaningful AO/AR practices at Home Base.

I am not of the opinion that establishing alignment between AO/AR policy and practice will resolve all of the challenges faced by the shelter team. Rather, I believe that improving the shelter team's ability to connect with and support their clients will lead to more positive outcomes for all parties. Particularly because of the spiritually-framed orientation of the group, bridging the gap between the current and desired state as it relates to AO/AR praxis will lead

the team towards a greater sense of empathy, connection, and success with their clients. Many of the issues faced by the shelter team relate to matters outside of their control; but, understanding their own role in racist and oppressive systems, and internalizing how these systems may impact their clients, is a change that is available to the group and will improve their sense of connection, empathy, and ability to relate with their clients.

Framing the PoP

The following section will present the broader contextual influences that shape and situate my PoP. I will integrate elements of CRT, White fragility, and resistance to change to describe the nuances of this problem and contemplate the role of leaders in leading AO/AR change.

Resistance and White Fragility

Resistance to change can be understood to include any conduct or comment that discredits, delays or prevents change from being implemented (Newstrom & Davis, 1997). Change management literature emphasizes the importance of understanding the cause of resistance when enacting change in order to formulate a plan that can realistically overcome it (Curtis & White, 2013; Dent & Goldberg, 1999; Meston & King, 1996). Curtis and White (2013) identify denial through use of defense mechanisms, as one means by which resisters obstruct the change process. These unconscious strategies help resisters to alleviate the anxiety caused by change, and can be addressed effectively if the workplace supports the resisters' psychological safety and allows them to express their feelings about the change in a way that ensures they feel heard by leadership (Curtis & White, 2013).

In her seminal text, White Fragility, DiAngelo (2018), describes the tendency among White people to respond to attempts to connect us to racist systems as morally offensive, and often triggering defensive responses. These sentiments were observed among shelter staff

when engaging in their previous AO/AR training, therefore, the concept of White fragility will be important in understanding and articulating the kind of resistance demonstrated by the shelter team. Although DiAngelo's work is not broadly understood as change management literature, the book focuses on the resistance to change that White people exhibit when faced with their own role in racist systems. She notes that White audiences often receive anti-racist messaging in a manner that prioritizes the emotional impact that such information has on them, rather than centering the needs of the Black people that are directly impacted (DiAngelo, 2011, 2018). She further suggests that maintaining the identity of a good, moral person, with good intentions and an open-mind is not an effective means of addressing racial inequity. During the course of interviewing shelter staff in relation to the workplace assessment, several members of the group recalled feeling offended, shamed and traumatized by the prior training sessions. In many cases, their negative response was rooted in the tension between their own identities as good people and the suggestion that they may be benefitting from racist systems. DiAngelo (2011) challenges people to engage in active learning about AR, accept the reality of White privilege, and build authentic relationships with people from other racial backgrounds.

DiAngelo is a White woman and has received some criticism from Black scholars who believe that her work infantilizes, disempowers, and dehumanizes Black people (Doubek, 2020) and allows White people to avoid accountability (Doyle, 2022). In a recent interview, Dr. Yaba Blay criticized DiAngelo's work, taking issue with the representation of resistance as "fragility" (Doyle, 2022). She argued that White people "can't position [themselves] as the centre of existence and exact diabolical harm on the entire world for generations and be fragile at the same time" (Doyle, 2022). She further suggested that by framing the issue as fragility, White women in particular subvert accountability for the harm caused by racism (Doyle, 2022). With this criticism in mind, it is particularly important to consider why White people may display characteristics of White fragility when resisting AR learning, and consider how this resistance is

rooted in a selfish fear of losing the power, privilege, and possessions they have acquired through centuries of racial oppression and colonization.

McWhorter argues that DiAngelo's White Fragility (2018) creates a dynamic wherein "any good White person is essentially muzzled" and that White allies are being alienated from the fight for racial justice because they are unsure where they might fit in to anti-racist political action (Doubek, 2020). To this end, some shelter staff have expressed interest in anti-racist praxis, but their experiences in previous training left them feeling ill-equipped and paralyzed by the fear that they might make a mistake in practice. This suggests that a well-considered implementation strategy for this learning could mitigate some of the resistance that was previously observed. In Ijeoma Oluo's book, "So you want to talk about race?" (2018) she offers narrative responses to common racist tropes. The book is presented as a tool for allies who are interested in engaging in anti-racist practices in their daily and professional lives. The well-researched book offers critical counter narratives from Oluo's life as a single, Black, mother of two boys, combined with relevant theory and statistics to contextualize her own experiences. Whereas DiAngelo (2011, 2018) has been criticized for shutting White allies out of engaging in AR work (Doubek, 2020), Olou provides direct, concrete guidelines for how and when to engage in daily practices of AR (Kendi, 2021).

DiAngelo (2011, 2018) and Olou (2018) challenge the historical tendency to prioritize the comfort of White audiences when engaging in learning related to racism. Although this project will respond to the emotional needs of the group, my intention with this OIP is to prepare Home Base staff for more challenging AO/AR learning by building their capacity and resilience with the material. Subsequent AO/AR learning will not centre their emotional responses to the content, as the aim of this OIP is to build enough capacity within the group that they can manage their emotional responses appropriately. As Katz et al. (2017) remind us, real and permanent learning is only possible when the discomfort that comes from self-reflection and critique is

embraced. To this end, consideration will be given to establishing a challenging but supportive learning environment for Home Base staff. In the past, the resistance born of discomfort created an insurmountable barrier for the message. During this project, discomfort will be established as a positive sign that change is taking place.

The Role of the Leader

Welton et al. (2018) emphasize the important role of leaders in instituting anti-racist change, noting that respected leaders enjoy greater trust and buy-in from employees than external educators. They argue that by engaging in AO/AR teaching, leaders can support their employees in working together to co-create a shared understanding of context-specific AO/AR practice (Welton et al., 2018). Feedback obtained during the workplace assessment suggested that previous attempts at AR training left the group feeling as though they were being shamed in a public setting for their Whiteness. The group blamed previous leadership for this dynamic, noting that they did not participate in the training, rather supervised the session and pointed out the participants' shortcomings in a public manner causing employees to feel humiliated.

In this project, I will leverage the strong relationship between the ED, myself, and shelter employees in leading change. The ED will be co-facilitating the learning program alongside me and is keen to share her own experiences with AR learning by intentionally setting an inclusive, supportive, and vulnerable tone for the training. Similarly, I look forward to offering details about my own difficult journey moving from the oppressive system of policing into a deeper understanding of AO/AR praxis.

Kotter and Schlesinger (1979) identified resistance to change as being rooted in self-interest, distrust, misunderstanding, contradictory information, and low tolerance for change and uncertainty. Change efforts that follow previous failed attempts at change can be particularly challenging (Deszca et al., 2020). Manning (2012) offers three fundamental principles to

overcome resistance when making subsequent attempts at change: (1) managing emotions, (2) honest and clear directives, and (3) open and constructive collaborative communication. Each of these principles will be critically important in developing the communication strategy for this initiative.

In 2016, when the organization imposed the AO/AR policy on the Home Base team, staff were not just being asked to adjust their behaviour; rather, these changes demanded the adoption of a social justice lens, requiring a paradigmatic shift in the way staff thought about and interpreted the world around them. Curtis and White (2013) identify this kind of change as more prone to resistance than other types of change, for example changes in technology. Unlike discrete procedural change, paradigmatic change has broad implications for shelter staff in their personal and professional lives and may create areas of cognitive dissonance that will require attention to reconcile perceived tensions. For this reason, and particularly within a constructivist spiritually-framed culture, another attempt to impose AO/AR policy may be received as additional destabilization in an already volatile workplace (Manning, 2018; Marquis & Huston, 2000).

Chen and Reay (2020) identified the four stages commonly experienced by employees that have been subject to the imposition of structural changes on their professional identity as: (1) resistance and mourning, (2) conservation and avoidance, (3) learning the new work, (4) modifying their professional identity to include the new work. This OIP will focus on moving the group from stage two to stage three of this change. It will lay the groundwork for the group to continue into stage four with the help of expert AO/AR educators with relevant lived experience.

Guiding Questions Emerging from the PoP

In considering my PoP, certain questions have emerged that inform the development of my OIP:

- What steps can be taken to better integrate AO/AR practice into the daily operations of Home Base?

- What is the role of senior leaders in driving this change?

- How can this employee group overcome their resistance and move towards a reflexive practice that opens their minds to challenging messages about their role in racist and oppressive systems?

In this section I will respond to these guiding questions. I will also consider four of the main challenges emerging from my PoP, and their relationship to other factors that could influence my OIP. The following content will build on previous sections and highlight elements of constructivism and the radical humanist paradigm.

Challenges Emerging from the PoP

I have distilled the myriad challenges emerging from this PoP down to four main areas. As I continue to work through the planning process for my OIP, further issues could arise; as Jones and Recardo (2013) contend, managing cultural change is an iterative, transitional learning process that should not be viewed as linear. The following subsections highlight the broader challenges I anticipate encountering as this OIP is implemented, including: resistance, residual impacts from previous change initiatives, challenges related to implementing paradigmatic changes rather that process-oriented change, and the reconstruction of reality.

Resistance

Previous sections have emphasized resistance among the employee group as an obstacle to implementing this change. Understanding the source of resistance is a critical step to developing a plan that can overcome it (Curtis & White, 2013; Dent & Galloway-Goldberg, 1999; Meston & King, 1996). Curtis and White identify resistance to change as a defensive behaviour that protects the identity and ego of the individuals resisting change (2013). In order to overcome change resistance, Jones and Recardo (2013), suggest a process of identifying the

resistance, surfacing the underlying causes, and addressing those causes effectively and efficiently. They describe the cycle of identify-surface-address as an ongoing process that should take place before and during the change initiative. To this end, the ED and I will engage in this process with staff before, during, and after the intervention. I will promote open communication between program leaders and participants as a means of supporting the group as they process their emotional responses to the learning, and we work to dismantle their resistance. This practice is supported in the research; Dutton and Heaphy (2003), emphasize the importance of employees feeling understood by leaders, and Carmeli et al. (2009) argue that by establishing that the leader is emotionally supportive and attuned to the needs of the learner, learning behaviour will improve and resistance will diminish.

For shelter staff, there are multiple sources of resistance. DiAngelo's concept of White fragility (2011, 2018), appears to be working in concert with their spiritually-framed cultural identity as good, moral people (Zohar, 2010), causing immense discomfort for the group when they are pushed to contemplate their own roles in systems of oppression. An additional source of the group's resistance to change appears to be more general, and related to what Chen and Reay (2020) identify as resistance that often manifests in groups following periods of considerable change, particularly when such change is imposed upon them without their input. The group has undergone a sustained period of volatility within their organizational context and have yet to recover from the destabilizing nature of these changes. As a result, they are inclined to be less receptive to new initiatives aimed at implementing further changes (Manning, 2018).

Previous Change Initiatives

Deszca et al. (2020), argue that previous failed attempts at change will impede subsequent change initiatives. They note that employees often become cynical and disillusioned by such failed change initiatives, resulting in additional resistance in the future. Deszca et al. (2020) suggest that such resistance can be overcome through engagement by leaders, timely

responses, and prioritizing two-way communication. Over the past five-year period, several

unsuccessful attempts have been made to address the poor AO/AR integration in service

provision. As a result, I anticipate that the group will demonstrate an elevated level of resistance

to this initiative. In order to mitigate the damage stemming from previous failed attempts at

change, this OIP will incorporate the ED for the organization into a critical, visible, interactive

role in the project. Participants will have an opportunity to communicate directly with her and I in

real time, as issues arise.

Paradigmatic vs. Procedural Change

Changing the way an organizational culture thinks and behaves is significantly more

challenging than typical or routine changes like implementing new procedures or technologies

(Jones & Recardo, 2013). Implementing changes that demand paradigmatic shifts in

understanding has broader impacts beyond the workplace and presents more complex forms of

resistance (Jones & Recardo, 2013). Jones and Recardo (2013) attribute this kind of resistance

to "intangible fears" (p.85), which they describe as perceived losses to identity, status,

relationships and the past. Overcoming these intangible fears requires significant time, support,

and stewardship by leaders (Jones & Recardo, 2013).

Reconstructing Reality

Constructivism is a critical socio-philosophical component in understanding how

knowledge develops in spiritually-framed cultures (Manning, 2018; Zohar & Marshall, 2000).

Constructivism challenges our often taken for granted understanding of social reality as

concrete and objectively real (Morgan, 1980). Rather, constructivism involves the co-creation of

knowledge by learning participants (Kolb, 2015). The constructivist paradigm that I believe

describes the current culture among shelter staff is interpretivism. The interpretivist paradigm is

based on the view that reality is constructed through the subjective experiences of individuals.

In the case of shelter staff, because they share so much of their lived experience and have

worked together for such a long time, I believe that they have co-created a shared interpretation of reality. In addressing my PoP, I hope to engage in a shift away from this interpretivist paradigm, to a radical humanist approach.

Radical humanism is similar to interpretivism in that it emphasizes the social co-creation of reality, but extends analysis to include a pathology of consciousness (Morgan, 1980). The term pathology of consciousness refers to the manner in which subscribers are confined to the bounds of the reality they have constructed (Morgan, 1980). In this way, the culture within Home Base appears constrained by the group's limited understanding of the prolific structural nature of White supremacy and how it shapes their sense of reality. Améry (1984) and Hartley (2020) contend that an unquestioning acceptance of totalitarian ideology (in this case White supremacy), alienates people from the human experience. Home Base staff are bound by their understanding of racism as discrete racist actions committed by immoral individuals. They perceive their organization and the systems that support it as objective, and offering equal access and support to all. Radical humanism considers how humans can engage in praxis to transcend this disengagement with the human experience (Liu, 2017; Morgan, 1980). The radical humanist paradigm prioritizes human welfare in all circumstances and encourages subscribers to revolt against notions of reality that undermine humans from thriving (Améry, 1984; Liu,2017).

The radical humanist lens supports the deconstruction of the current reality within the shelter, and is integrated into the content being presented through the training curriculum. The homogenous identities and lived experiences of shelter staff, combined with their lack of understanding in relation to the identities and lived experiences of their clients, will challenge the ED and I as we support the collaborative reconstruction of Home Base's culture. Insofar as constructivism offers an andragogical tool during this initiative, the ED and I will maintain capacity to shape the narratives connected to this learning. To this end, Home Base staff will

have an opportunity to actively participate in the co-creation of the culture being built through this initiative, but their agency will be limited in that they will not determine the content, narrative, structure, or format of the project.

DiAngelo (2011, 2018) and Olou (2018) challenge the historical tendency to prioritize the comfort of White audiences when engaging in learning related to racism. However, for the purposes of this project, consideration will be given to the emotional needs of the group. My intention with this OIP is to prime Home Base staff for more challenging AO/AR learning by building their capacity and resilience. Subsequent AO/AR learning will not centre their emotional responses to the content.

Leadership-Focused Vision for Change

In this section I will outline my vision for change in greater depth, analyzing spiritually-framed cultures through an intersectional lens. I will further define the gap between the present state and desired state within the organization and consider who will benefit from addressing this problem. I will examine the role of communication in leveraging change drivers to establish interest convergence among the employee group.

Vision for Change

As the organization works towards their broader vision to improve the lives of marginalized women, recent interactions within the shelter have demonstrated how the group's resistance to AO/AR training manifests in harm towards racialized clients. In my vision for change (which is shared by organizational leaders), the shelter staff will absorb and integrate a deeper understanding of systemic racism and their roles within racist systems. They will learn how to practice their roles in a manner that mitigates the harm they enact when supporting clients. This change requires a level of competency related to racism and oppression wherein the shelter staff are able to anticipate when a given situation might be experienced as racist or oppressive by clients. Considerable effort is required on the part of the employee group to enact

such a change; however, this effort is outweighed by the urgent need to mitigate client harm, align practice with policy, and decrease the risk of litigation and reputational damage for the organization.

The term intersectionality references the "vexed dynamics of difference and the solidarities of sameness in the context of antidiscrimination and social movement politics" (Cho et al., 2013, p. 787). An intersectional lens insists that we examine the roles that difference and sameness play in our understanding of gender, race, ability, and other axes of power (Cho et al., 2013). It is through an intersectional lens that people come to understand and anticipate the broader implications that their conduct has on people with different lived experiences (Cho et al., 2013). Introducing the shelter staff to an intersectional lens and stewarding them through the practical implications of intersectionality is foundationally important to this project.

As the AO/AR practices at Home Base align with the broader organizational vision, shelter clients will benefit from care that honours their intersectional identities. Whereas current practices within Home Base are reifying the experiences of oppression otherwise faced by this client group, institutionalization of AO/AR praxis can mitigate elements of the harm caused by racism and oppression from their experiences in the shelter. This change could allow space for additional client growth and security.

In addition, Zohar (2010) argues that in spiritually-framed cultures, job satisfaction is closely related to client success and connection. As such, it is reasonable to expect that as staff improve their connections with their client group and develop a better understanding of their lived experience, their connection to their work will strengthen. Moreover, as clients face fewer harmful interactions with shelter staff and more meaningful connections between clients and staff occur, I anticipate improvement of workplace dynamics within Home Base.

Change Drivers

Change drivers are circumstances that create or motivate change (Whelan-Berry & Somerville, 2010). For this PoP, one of the change drivers was the ratification of an AO/AR

policy within the organization in 2016. Unfortunately, since then, Home Base staff have been resistant to the learning required to practice effective AO/AR support. In the ensuing five years, social movements epitomised by the #BlackLivesMatter movement have effectively forced the public to consider the role of systemic racism in the oppression, abuse and disenfranchisement of Black people in North America and across the globe (Taylor & Davis, 2021). To this end, some of the previous resistance to these messages may have diminished over time. The ratification of the AO/AR policy implies that the organization's leadership is ready for this change. The ED and other senior leaders will share in elements of planning for this project. They will offer feedback related to logistics, potential barriers posed by the collective agreement, and support coverage requirements at the shelter.

Ensuring that the voice of the client is heard within the organization is fundamentally important to supporting social justice within practice (Welton et al., 2018). Deszca et al. (2020), recommend that leaders review change metrics regularly and consider emergent themes in their findings to determine how additional support or learning can help sustain the institutionalization of change. Until recently, the organization had not made a formal effort to obtain input from the client group. A new initiative that was enacted across the organization in 2021, seeks feedback from the client group in regards to their experiences accessing services. As client feedback is received, leadership within the shelter is tasked with specifically addressing these issues with the staff involved. Periodically (every four to six months), the feedback will be anonymized and shared with staff throughout the organization to continue the process of collaborative learning. One of the potential restraining forces that may impede this change process is a lack of resources within the organization. The organization has experienced long-term vacancies in key leadership positions, which has resulted in a significant increase in the workload of certain senior leaders. Insofar as the organization is committed to instituting AO/AR praxis, I have concerns about the sustainability of the client feedback component of this plan over time.

Organizational Change Readiness Tools

In this section I will describe the current degree of organizational change readiness based on the assessment tools developed by Kezar (2018) and Deszca et al. (2020). I will also consider competing internal and external forces that will shape the change planning process. Deszca et al. (2020) offer leaders a practical tool for assessing organizational change readiness. Broken into six readiness dimensions, the tool assesses the current organizational state based on: previous change experience, executive support, credible leadership and change champions, openness to change, rewards for change, and measures for change and accountability (Deszca et al., 2020). For reference, Appendix A includes this change readiness tool with my answers reflecting the organization supporting this project. The range of potential scores for this tool runs from -10 to +35; my organization scored 22, indicating that we are in relatively good standing to begin implementing the change. Nonetheless, the tool has highlighted specific dimensions that may require further attention and are elaborated on below.

In addition, I also applied my PoP dynamics to Kezar's readiness for change measure (2018) and included my responses in Appendix B. This tool was originally developed with educational institutions in mind; however, the fundamental elements of the tool may be applied to any organization planning change. Using my PoP, the answer to 35 of the 38 readiness elements was agree or strongly agree.

Change Readiness Findings

Both change readiness measures offered insight into the current state of our organizational readiness for this project. As discussed previously, prior efforts to improve the AO/AR praxis through staff training initiatives were unsuccessful. In this dimension of Deszca et al.'s measure, the organization did not rate well. However, since the last time these attempts were made, three important changes have taken place within the shelter organization and broader community:

- The previous shelter leadership team has changed. The former shelter manager and her director were not trusted by shelter staff, and no longer work for the organization. In the past, AO/AR change efforts were connected with these two leaders.

- Social movements like #BlackLivesMatter gained popular traction in the media, and made a meaningful impact on the way our culture understands systemic racism (Taylor & Davis, 2021).

- The culture within Home Base has shifted towards a higher level of staff engagement when compared to the previous year, and staff have become more trusting of senior leaders and ongoing organizational changes.

I believe these changes will mitigate some of the challenges that are common in change efforts that follow previous unsuccessful change initiatives.

This project also scored poorly on Deszca et al.'s (2020) category of openness to change. As discussed in previous sections, Home Base staff have experienced tremendous change in recent years. This internal and external change was largely imposed upon them, without their input or collaboration. The change fundamentally transformed their job roles and destabilized the work group. As Chen and Reay (2020) found, teams often respond to imposed job redesign with resistance, as is the case with the shelter staff team.

As per an internal assessment of the workplace dynamics, the organization has received criticism from the employees for the limited rewards and recognition they are offered for their success. The unionized status of the employee group presents certain challenges related to employee rewards; however, until recently, limited effort was made to work around such obstacles. As a result, the organization also scored poorly on the rewards and recognition section of Deszca et al.'s (2020) measure.

The dimensions of executive support, and credible leadership and change champions were identified as strengths in Deszca et al.'s (2020) measure. This project has strong support

from senior management, and an employee group that trusts and respects the senior management team. Moreover, the ED will play a visible leadership role in this initiative.

Deszca et al.'s (2020) measure identified that there are sufficient opportunities within the organization to measure change and accountability. As identified above, the organization has only recently begun to solicit feedback from their clients in relation to the services they provide, but this additional venue for collaborative working relationships offers additional data to support this project. Overall, Deszca et al.'s (2020) change readiness measure highlighted some important strengths of this project, and critical areas that will require care and attention.

Kezar's change readiness measure identified that the organization was very much prepared for the change. The initiative scored well in almost all dimensions of the measure, with the exception of communication. Because we have not yet launched the project, the communication has not been developed or disseminated. The results of these measures suggest that although the organization may be ready for the proposed change, certain individual and structural elements still require attention.

Comparison of Tools

In reflecting upon the two readiness tools that I have referenced in relation to this project, I noted some key differences in the way they assess readiness. For example, in Deszca et al.'s version (2020), the possible scores ranged from -10 to 35, with any score below 10 indicating the organization may not be ready for the change. My organization's score of 22 indicates a cautious readiness, with the tool highlighting certain dimensions of readiness to strengthen or leverage as I proceed in developing this plan (such as staff openness to change, and recognition and rewards for staff). In contrast, Kezar's tool (2018) indicated a much higher level of readiness, with all but 3 of the 38 responses indicating agreement or strong agreement with the readiness criteria. When quantified as a percentage, Desca et al.'s tool indicates a readiness score of 71%, whereas a simple quantification of Kezar's tool indicates a readiness score of 92%.

In reflecting upon why there is such a significant difference between the two tools, I considered the particular emphasis that Deszca et al. placed on the emotional components of change. In contrast, Kezar's tool seemed to be based on a more functionalist set of criteria that focused on organizational structure and systems. Honouring the emotional realm is particularly important in a spiritually-framed workplace (Manning, 2018; Zohar 2010; Zohar & Marshall, 2000), and will be critical in developing the staff group's openness to change. Nonetheless, both tools offer important insight into the organization's readiness for change.

In considering the findings of my organization's change readiness results, I have determined they are ready for this kind of project. In both measures, careful and considered communication was identified as a critical component of the change. I am hopeful that the communication strategy described in chapter 3 will be received with openness by the shelter staff.

Chapter 1 Conclusion

In this chapter, I have described the PoP and provided important contextual information to situate this project to deepen understanding and establish the need for change. I have further explained my vision for change and leadership agency within the organization, and framed the PoP using relevant theory, analyzing the organization's readiness for change. In the next chapter, I will build upon previous discussion and analysis by developing my leadership framework to deepen my understanding of the change and lead the change process. I will also incorporate institutional data and information into a critical analysis of the organization. I will then contemplate solutions to the PoP that are underpinned by principles of social justice and ethical leadership.

Chapter 2: Planning and Development

Building on the examination of my organizational context and PoP in chapter 1, chapter 2 focuses on the development of solutions to the problem. In this chapter, I will present my integrated leadership approach to change, drawing from the three foundational approaches of transformational, transformative, and situational leadership. Next, I will describe my integrated framework for leading the change process, which incorporates the model for planned change (MPC) (Kolb & Frohman, 1970) with Deszca et al.'s (2020) change path model, supported by Gentile's (2010) giving voice to values (GVV) curriculum. I will then engage in a critical organizational analysis using Nadler and Tushman's (1999) congruence model of organizational behaviour. Integrating learning from previous sections, I will present four possible solutions to my PoP, and adjudicate each based on relevant criteria to determine the most appropriate solution to pursue. This chapter concludes with a section on leadership ethics and change issues wherein I discuss the principles of ethical leadership, power, privilege and oppression, our obligations to engage in truth and reconciliation, and other organizational responsibilities.

Leadership Approaches to Change

Hogan et al. (1994) argue that "leadership involves persuading other people to set aside for a period of time their individual concerns and to pursue a common goal that is important for the responsibilities and welfare of the group" (p. 493). The leadership approaches I will use for this project are well suited to support changes that prioritize communal wellbeing and the responsibilities of the group in the pursuit of a common goal. TL, transformative, and SL approaches will guide the OIP in an integrated, complementary manner. Figure 1 illustrates how each of these approaches will work together to prepare staff to engage more authentically with AO/AR training.

As discussed in chapter 1, the key elements of leading this change are: motivating employees to support organizational goals, prompting others to improve, collaborative co-

creation of organizational reality, trusting relationships between leaders and followers, focus on

long-term change, social justice orientation, consideration for the external environmental

context, agility and adaptability to organizational and employee needs, and psycho-emotional

responsiveness.

Figure 1

Integrated Leadership Approach
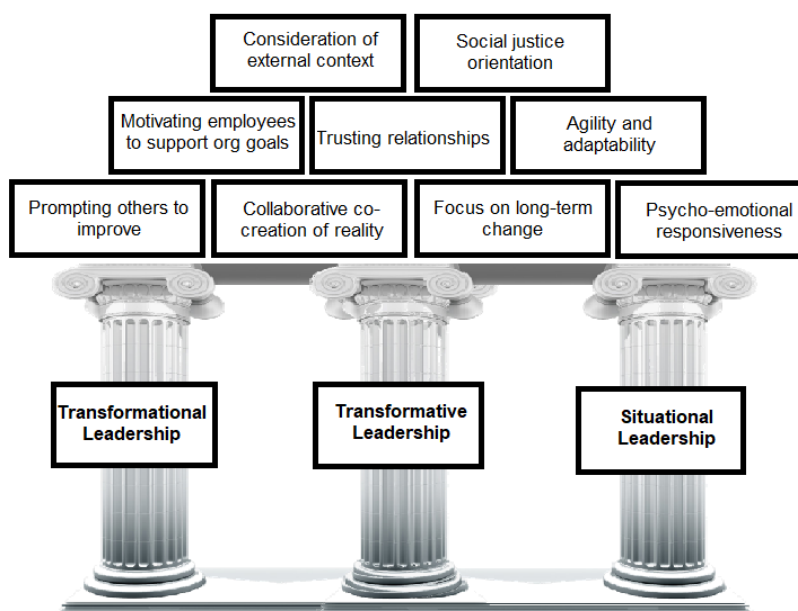
The pillars of this change initiative are the elements of my integrated leadership approach: TL,

transformative leadership, and SL. TL and transformative leadership have considerable overlap,

and this figure shows the ways they compliment each other and offer a critical edge to support

this project. Although SL is relevant in the planning of this project, it will become most

provocative during the execution of the training program. By integrating TL, transformative

leadership, and SL, I have developed a leadership approach that is well suited to support the

various aspects of the change outlined in this OIP.

Transformational Leadership

TL offers an effective approach for engaging in organizational change and aligning

practice with policy. For this project, the principles of TL will guide the development and

implementation of the project at a high level by inspiring a new vision for care at Home Base. TL focuses on four key facets of leadership: influencing followers, inspiring motivation, intellectual stimulation, and individual consideration (Bass, 1985). With roots in the discipline of political science (Leithwood & Jantzi, 2005), TL incorporates research in the fields of sociology, administration, psychology, and education (Yammarino et al., 1993), and examines the motivation to drive common purpose, and focus to meet organizational goals (Shields, 2010). In the previous chapter, my plan considers these various dimensions of change by applying the lens of a spiritually-framed culture; as such, it is critical that my leadership approach also honours these elements of the PoP. TL is understood as a process approach that transforms organizations and the people that work within them (Northouse, 1997), and highlights the interactions between leaders and followers; in particular, how they push each other towards a higher degree of morality and motivation (Burns, 1978). TL focuses on the ability of leaders to prompt others to seek opportunities for change and improvement, and examines the needs and motivation that contributes to this drive (Eliophotou-Menon & Ioannou, 2016). To this end, my project will focus on engaging the employee group in a manner that prompts their desire to change. Through this intervention, I hope to motivate the team to seek out, and whole heartedly participate in, additional opportunities that will help build their capacity to tolerate their discomfort related to AO/AR learning, so that they may integrate AO/AR knowledge into their practice. TL promotes employee commitment to the organization, their trust in their leader, their level of job satisfaction, and their motivation to grow and improve their practice (Bogler, 2001; Griffith, 2004; Leithwood & Jantzi, 2006). TL is an effective approach for building a culture of collaboration, where leaders and followers work together to accomplish the goals of the organization, while honouring the unique needs and differences of individuals (Bass & Avolio, 1994). It is through this TL approach that I aim to motivate the employee group towards purposeful action, organizational commitment, and an ongoing desire to learn.

Currently, the leadership approach used within the organization is best described as TL. Organizational leaders work hard to develop meaningful personal connections with employees, and regularly engage with staff to collaboratively co-create the organizational culture and plan for the future. Leaders within the organization have demonstrated a commitment to investing in employee development through internal and external training, and the creation of sabbatical opportunities for professional development; efforts that have contributed to improvements in employee engagement. TL research highlights the mediating role of trust in employee championing behaviour within the context of organizational change (Islam et al., 2020). To this end, organizational leaders have focused on developing trusting relationships with their employees by acting with integrity and demonstrating transparency in their managerial decisions.

Historically, the relationship between leaders in this organization and their employees was contentious and distrustful. In recent years, fostering trusting relationships with employees has become a priority for the new leadership team. Trust is a fundamental element of TL (Shih et al., 2012). In the context of this project, the definition of trust that I have used is: "the extent to which one is willing to ascribe good intentions to, and have confidence in, the words and actions of other people" (Cook & Wall, 1980, p. 39). This definition challenges us to understand trusting each other as a verb, an action that is taken by choice to create space for vulnerability and growth, wherein trust is produced or dismantled through relational interaction between leader and follower.

Trust in leadership has been consistently recognized by interdisciplinary scholars as critical to improved job attitudes, team dynamics, communication, organizational relationships, conflict management, psychological contracts, and learning (Dirks & Ferrin, 2002). Shih et al. (2012), found that when trust is established in a leader relationship, employees will more readily contribute to the exchange of ideas in the presence of their colleagues and leaders. The trust relationship that has been fostered between the ED, myself, and the employee group will be

fundamentally important in implementing an effective change project. Brown (2018) argues that leaning into our own vulnerability as leaders is critical to creating a culture that will allow employees to develop courage and resilience when faced with fear and uncertainty. By modelling our own vulnerability in the context of this trusting relationship, employees will begin to feel comfortable enough to follow suit and work through their own fear and resistance. The TL approach to change offers followers support for (and motivation to) change, pushing them towards an organizational vision that expands beyond their former systems and practices (Bass & Avolio, 1994). This notion of expanding beyond former systems and practices echoes the radical humanist belief that our perceived limits are socially constructed and therefore changeable.

Transformational leaders are prepared and willing to take risks when pursuing change and innovation (Bass & Avolio, 1994). They "engage with others in such a way that leaders and followers raise one another to higher levels of motivation and morality." The TL approach speaks to the overarching leadership lens that drives this work. Understanding this change as urgent and necessary, and considering the context of previous failed attempts, my project will focus on innovating a new approach to supporting a paradigmatic shift among employees that aligns with organizational goals and policy. This plan both relies upon, and potentially undermines, the trust that currently exists among participants and leaders; this risk is outweighed by the opportunity to engage in critical change that prioritizes equity, ethics, and social justice, and the potential to rebuild a stronger, more aligned organizational culture.

The TL approach addresses the areas of influencing followers, inspiring motivation, intellectual stimulation, and individual consideration (Bass, 1985). Each of these dimensions are important considerations for this project, however certain critical gaps remain. The TL approach has been criticized for overlooking the impact of external realities and disparities beyond the organization that impede the success of the broader organization and parties operating within it (Shields, 2010). As discussed in chapter 1, the external environment has a significant impact on

the problem and change I am proposing; therefore, I will weave elements of other leadership approaches into my approach to better support this dimension of the project. Although TL accounts for respectful consideration and personal concern for employees as individuals (Bass, 1985), I believe the TL approach is too rigid to engage with the individual emotional responses I anticipate from members of the employee group. Furthermore, the approach lacks the critical conscience required to address the PoP. For this reason, I will bolster TL with other leadership approaches to fill this gap.

Transformative Leadership

Transformative leadership has roots in TL, and incorporates elements of charismatic, level 5, principle-centred, servant, and covenantal leadership (Caldwell et al., 2012). Caldwell et al. describe transformative leadership as "an ethically based leadership model that integrates a commitment to values and outcomes by optimizing the long-term interests of stakeholders and society and honouring the moral duties owed by organizations to their stakeholders" (p. 176). Unlike TL, the transformative leadership approach takes a considerable outward gaze when examining problems and considers the broader impacts of the organization on society and stakeholders. To this end, transformative leadership interrogates the vision and purpose of the organization, developing a commitment to the vision and how clients and stakeholders are served within that context. Historically, the organization and shelter staff have struggled to understand their role in relation to broader systems and client experiences. Integrating transformative leadership into this element of the change emphasizes the need for clients to receive equitable, respectful services that consider the impacts that systems of oppression have on their lives. In addition, the transformative approach considers the needs of employees to re-engage with their work and develop a stronger connection with their clients; the needs of senior leaders to ensure alignment of their organizational principles with institutional practice; and the needs of the broader organization to mitigate the risks associated with continued maintenance of the status quo, including litigation and reputational damages. Transformative leadership

offers a contextually grounded, equity-driven approach to addressing the PoP, that is not fully developed through a traditional TL approach.

Transformative leadership prioritizes the ethical obligations of the leader (Kouzes & Posner, 2010), and challenges them to earn credibility with their employees by demonstrating character and competence (Covey, 2004). It is through this commitment to ethics and integrity that transformative leaders develop effective, meaningful, and trusting relationships with their employees (Kouzes & Posner, 2010). It is through this relationship that the transformative approach can then be leveraged to interrogate the organizational vision and identify inherent inequities within the organization and its culture. This project provides leaders an opportunity to demonstrate their character and competence (integrity) through meaningful and vulnerable interactions with shelter staff, while guiding them through a critical analysis of the organization and its work.

As with TL, a transformative leadership approach seeks to convert organizational intention into a sustainable reality (Bennis & Nanus, 2007). This intention speaks to the explicit goal of co-constructing a paradigmatic shift in the way employees understand and interpret their reality. It is through this work that transformative leadership aims to find new, socially just solutions that challenge assumptions and established systems (Christensen & Raynor, 2003), and like TL, the focus of transformative leadership on equity and dismantling oppressive systems aligns with the radical humanist paradigm. The depth of socially just analysis offered by a transformative leadership approach complements elements of TL, centering the interests of the community and other organizational stakeholders. Nonetheless, neither approach is particularly agile or adaptable, nor do they focus on the individual or situational coaching needs of employees. For this reason, the SL approach will also support this project at the level of the individual employee.

Situational Leadership

SL will have a critical role in the implementation phase of this project. SL underscores the value of having a broad range of different skills and traits that can be used to address a wide variety of situations, and recognizes that these skills must be adapted appropriately considering the circumstances (Hersey & Blanchard, 1969). To this end, leaders may be naturally inclined towards certain leadership styles, but required to pivot their approach to suit the capacity and maturity level of their employees (Sánchez Santa-Bárbara & Rodriguez-Fernández, 2010). SL offers the agility and responsiveness to support leaders as they address potential resistance from employees that are struggling with the new vision for care.

SL also highlights four types of leadership interventions, identified by Hersey and Blanchard (1969) in the situational leadership model. Each level of intervention is differentiated by its degree of supportive behaviour relative to its degree of directive behaviour. There is an inverse relationship between degree of direction required and the employee's willingness to engage in a given task. Likewise, there is an inverse relationship between the level of support leaders are expected to provide for their employees and the employee's ability to complete the task. Directing represents the most intense form of intervention, requiring leaders to teach employees foundational skills and carefully supervise them as they build their capacity. This intervention is required when an employee is both unable and unwilling to complete a given task. In this leadership style, there is limited emphasis on support. Coaching is an intervention that involves high levels of directive and supportive behaviours, because an employee lacks the skill but has the motivation to accomplish a task. Supporting is a type of intervention that involves highly supportive behaviour and low directive emphasis. This kind of intervention is best suited for people who already have the required skills, but need encouragement to build their confidence in applying them. The fourth leadership style is delegating, this intervention is appropriate when the employee has both the skills and motivation to complete a given task.

As I enter the development phase of my OIP, I believe a SL approach will serve me well in creating a project that is responsive to the various personalities in the group and the wide range of responses I expect to see from them. Considering my role as an external contractor, and the complex nature of my PoP, SL highlights the need for agility and adaptability in this kind of work.

Admittedly, while writing this OIP, I have presented Home Base staff group as somewhat monolithic in their level of competence in AO/AR practice; however, it is likely that the group is more nuanced in their skills and capacities to accept and integrate AO/AR learning. To this end, SL reminds us of the potential for a vast range of responses from each employee, and our responsibility to engage with the group appropriately, meeting them where they are in the process. The SL approach is well-suited for addressing the challenges presented by White fragility and general resistance to the paradigmatic shift I am proposing.

Framework for Leading the Change Process

The following section describes the three complimentary change frameworks that will be used to lead this change. When considering this intervention more broadly, as an external contractor, Kolb and Frohman's (1970) model for planned change (MPC) offers an appropriate, if general, framework. The focus of MPC is supporting the client's needs and sustaining a meaningful and beneficial relationship with the client. From there, Deszca et al.'s (2020) change path model (CPM) provides a critical structure for the planned intervention that focuses more on organizational needs. Their framework is bolstered by Gentile's (2010) giving voice to values (GVV) curriculum, which is specifically focused on supporting the psychological elements of change, and intended to honour the needs of the employees. Figure 2 illustrates how each framework will work together to support this change, and which leadership approach aligns with each.

Figure 2

Integrated Stakeholder-Framework-Leadership Approach
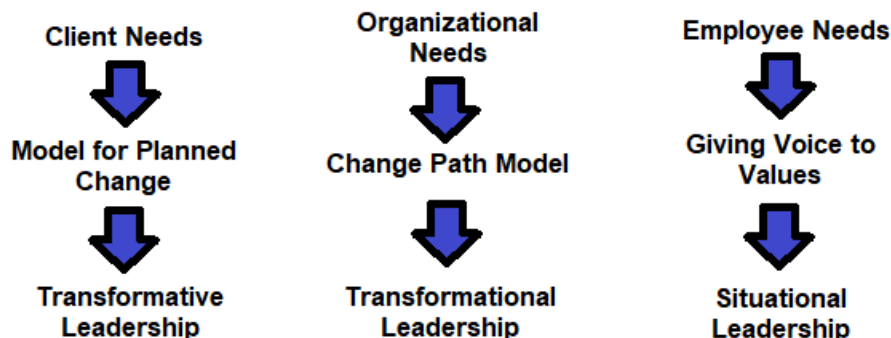
Relevant Framing Theories

As an external contractor, one of the key change frameworks I have used in my work was developed by Kolb and Frohman (1970). The focus of MPC is building a cooperative and beneficial relationship with the client in order to achieve their organizational goals (Kolb & Frohman, 1970). MPC presents a change framework using seven stages which include: scouting, entry, diagnosis, planning, action, evaluation, and termination (Kolb & Frohman, 1970).

In the scouting phase of the intervention, no commitment has been made between the client and consultant, and the two are exploring the potential for a relationship (Kolb & Frohman, 1970). In the entry stage, a contract is negotiated and the terms of the mandate are agreed upon (Kolb & Frohman, 1970). The diagnosis phase involves an assessment of the client's problem, and the subparts that contribute to it (Kolb & Frohman, 1970). These three stages of intervention were completed during the spring and summer of 2020 when I was hired by the organization to complete a workplace assessment at Home Base. The planning stage of the intervention involves the creation of plans for change that will address the problem (Kolb & Frohman, 1970). This OIP represents the planning phase of the intervention. The action phase is represented by the implementation of the plan (Kolb & Frohman, 1970), which will follow the

approval of this OIP by the ED for the organization. The next stage is evaluation of the change, which will be described in greater detail in chapter 3. Finally, the cycle ends with the termination stage at the conclusion of the intervention. Although somewhat dated, Kolb and Frohman's (1970) MPC continues to be supported by research in the area of change management (Bal et al., 2018; Cha, 2007; Reed et al., 2015). The MPC fits well with my role as a consultant external to the organization and reflects the work that has been completed to date on this project, but focuses largely on the needs of the contractor's client during the change process. In an effort to address the needs of the organization and employee group in a more fulsome manner, I will augment their model with Dezsca et al.'s (2020) change path model supported by Gentile's (2010) GVV curriculum.

The change path model (CPM) (Deszca et al., 2020) is based on four stages of change: awakening, mobilization, acceleration, and institutionalization. This model offers a framework for change that is rooted in analyzing organizational gaps and supports leaders in developing a clear vision for change. In addition, Deszca et al.'s model offers a framework for change that supports the psychological elements of change, particularly when bolstered by the recommended GVV curriculum (Gentile 2010; Deszca et al., 2020). GVV provides an opportunity for participants to contemplate and share the way their personal values interact with the change (Gentile, 2010). Deszca et al.'s model recognizes that change is not a linear process, allowing for leaders to respond and adapt to the psychological needs of participants in a manner that Kolb and Frohman's model (1970) does not.

With consideration given to the factors presented above, I have determined that the framework I will use to support the project is an amalgam of MPC and CPM with GVV (Gentile, 2010; Deszca et al., 2020). I chose this integrated change management framework for several reasons. CPM is a comprehensive and detailed model that offers a straightforward, accessible framework for leading change (Deszca et al., 2020). The four stages of CPM align well with the TL approach endorsed by organizational leaders, and is flexible enough to support situational

and transformative leadership approaches. Moreover, the framework fits with the work that has already been completed in relation to the problem; specifically, the workplace assessment. In addition, particular attention is given to the emotional responses and needs of stakeholders involved in the change (Deszca et al., 2020), which, in a spiritually-framed workplace is critically important (Manning, 2018; Zohar 2010). The four stages of change can be applied to my OIP as follows, with some degree of overlap between each phase.

Awakening

During the awakening stage of the CPM, the group will be introduced to the training program by trusted leaders during an in-person staff meeting. Leaders will invite employees to consider how their connection with clients has shifted in recent years, and the impact that lived experience of marginalization has on developing relationships. Employees will be given an opportunity to discuss the information with leaders, and raise any questions or concerns they may have. This stage of the project is critically important in establishing a compassionate, respectful, and responsive tone for the project, and minimizing potential resistance from the group.

This phase of change focuses on supporting staff to better understand the PoP within the context of Home Base. Based on the interviews that I conducted as part of the workplace assessment, the shelter staff are aware of certain elements of the problem; for example, many of the staff lamented their difficulty connecting with clients and associated this sentiment with a level of job dissatisfaction. The employees stopped short of recognizing that their difficulty connecting with their clients related to a lack of shared life experience or intersectional lens, and the power dynamics implicit to the relationship between shelter staff and clients (Strier, 2007). In fact, many of Home Base staff dismissed the notion that these issues factored into their professional engagement and therapeutic capacity, arguing that the employee group was "colourblind." Crenshaw (2019) describes the claim of racial colourblindness as a willful effort to deny the power of racism and control the parameters of racial discourse. She argues that racial

colourblindness "at the most basic level mobilizes a metaphor of visual impairment to embrace a simplistic and misleading affirmation of racial egalitarianism" (p. 4). She further argues that the claim of racial colourblindness connects racism to an individualistic aversion to skin pigment rather than the systemic interference in opportunity and resource acquisition based on race (Crenshaw, 2019).

Critical race theorists (Abrams & Moio, 2009; Constance-Huggins, 2019; Dixson & Lynn, 2013; Ladson-Billings & Tate, 1995; Miller, 2020) refute two principles with historical roots in the justice and helping professions: (1) that of systemic/individual "colour-blindness" and (2) that "colour-blindness" is superior to race consciousness (Crenshaw et al., 1995, p. xiii). Critical race theorists challenge the capacity of individuals and systems operating from a "colour-blind" paradigm to support people of colour, and instead, urge us to consider people of colour as individuals rather than assuming they share one monolithic identity (Abrams & Moio, 2009; Crenshaw et al., 1995). To this end, the "awakening" that this change requires, involves connecting the challenges shared by Home Base staff to their lack of race-consciousness. The awakening process for this OIP will not manifest in one discrete step, rather it will begin with the initial communications to staff introducing them to the project and continue through the project implementation.

Mobilization

The mobilization phase calls for leaders to organize the human and technical resources required for change, identify potential limitations, and consider the power dynamics at work and how they may impact the change (Deszca et al., 2020). This stage involves solidifying the gap analysis to determine the appropriate course of action and access the necessary resources. The organizational gap analysis for this project identifies the culture within the shelter as incongruous with the desired state for AO/AR praxis, and will be discussed in greater detail later in this chapter.

Acceleration

This phase of the change process involves planning the actions required for the implementation of the change and building organizational momentum (Deszca et al., 2020). This OIP represents the detailed plan of action to address my PoP. Although considerable research and contemplation has helped to formulate this change plan, Deszca et al. (2020) notes that this stage of the change process is not linear; they compare the experience of managing organizational change to changing the tire on a moving car. For this reason, engaging in an SL approach during this phase of change will be critical; ensuring that change leaders meet the employees where they are, leverage resources to build momentum for the change, and respond appropriately and professionally to issues as they arise.

Institutionalization

Deszca et al. (2020) describe this phase of change as conclusionary, and an opportunity to reflect upon and analyse the change efforts, evaluate the efficacy of the change process, and consider new ways to support the change moving forward. Particularly in its application to my PoP, it is important to note that there is no true finish line in the effort to institutionalize AO/AR practices within Home Base. The initiative that will be undertaken through this OIP is merely a primer for the ongoing work involved in dismantling oppressive practices within the shelter.

As part of the process of institutionalizing these changes, the organization will be engaging in ongoing data collection aimed at building a culture of continuous improvement and reflexive learning at the shelter. In addition, they will be arranging subsequent AO/AR training sessions following this project and installing a small resource library in an effort to encourage staff to engage with the material during slow shifts or at their own leisure. It is my intention, that the initiative will continue beyond this first iteration articulated in my OIP and sustained engagement in AO/AR learning will become part of the new culture within Home Base. Curtis and White (2013) argue that this kind of sustained change will only happen if stakeholders consider the process meaningful and transformative.

Giving Voice to Values

When leading change related to the personal values of employees using a CPM, Deszca et al. (2020) recommend integrating elements of the GVV curriculum (Gentile, 2010) into the change process. The GVV curriculum provides a framework for leaders who need to push back skillfully and effectively when circumstances contradict a person's values (Deszca et al., 2020; Gentile, 2010). The GVV curriculum provides an opportunity for participants to develop a more articulate sense of their values and understand how they can come into alignment with the change. GVV offers a framework for more sensitive, caring, and psychologically supportive change management. Moreover, Deszca et al. (2020) argue that the GVV curriculum encourages people to think critically and strategically, to overcome resistance resulting from value conflicts, and to advance change. The awakening and mobilization phase of Deszca's model will offer a point of engagement with the GVV curriculum, as staff work to accept information they have previously resisted.

Critical Organizational Analysis

The following section describes Nadler and Tushman's congruence model for organizational behaviour (1999). I will present an illustration of the congruence model as applied to the PoP, and explain each dimension using contextual information from Home Base. The model clarifies and solidifies the gap between the current state and desired state, articulating the key elements of my gap analysis.

The Congruence Model

In their congruence model of organizational behaviour, Nadler and Tushman (1999) understand the organization "as an open system that transforms input from the external environment into output of various types" (p 47). The congruence model considers the consistency of formal and informal arrangements, people, core work, and articulated strategy, and engages in institutional gap analysis by identifying areas where these dimensions do not

align (Nadler & Tushman, 1999). Nadler and Tushman (1999) argue that "effective organizations maintain a consistent architecture, with minor variations, throughout the enterprise" (pp. 53-54). As I have argued in previous sections, there is currently a lack of consistency between the organizational goals which are supported in policy, and the manner in which the core work of the shelter is practiced. This incongruency is disrupting the relationship between staff and their clients, and impeding the support this marginalized group receives.

I have discussed the impacts of political, social, economic, cultural, and institutional changes on the organization in previous sections. By framing the Home Base shelter as an open system, we are able to recognize the myriad ways that these input and output flows impact the experiences of clients and staff within Home Base. When applied to the current state of Home Base, inconsistencies emerge that provide insight into the gaps between the current and desired state.

Figure 3

Organizational Congruence Model Applied to PoP
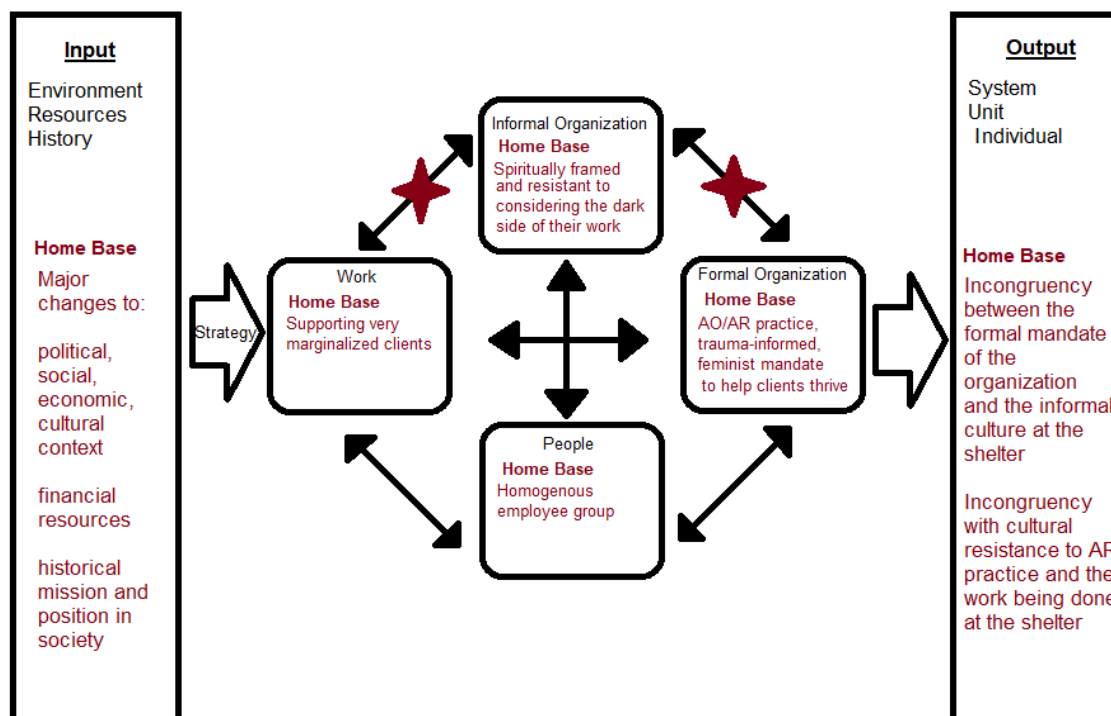
Note. Adapted from "The organization of the future: Strategic imperatives and core competencies for the 21st century" by D.A. Nadler and M.L. Tushman, 1999, *Organizational Dynamics*, *28*(1), p 48.

Figure 3 draws from Nadler and Tushman's congruence model of organizational behaviour to illustrate organizational gaps. In this model, inputs include all the contextual factors that have contributed to this problem: political, social, economic, cultural factors as well as financial resources available and the mission and position of the organization within society. These internal and external input factors have shaped the manner in which organizational strategy applies to the organizational components. At present, there is alignment between the inputs, strategy, and work. It is worth noting here that the organization has been without a strategic plan for almost four years, and although the current ED has developed an interim plan in recent months, organizational decisions had not been linked to organizational strategy for several years prior. This strategic disconnect may be a contributing factor to the organizational incongruence.

As shown in the model, there is inconsistency between some of the organizational components. The informal organization (shelter culture) has been described in detail in previous sections as a demographically homogenous, spiritually-framed group that is both deeply connected to their work, and resistant to acknowledging the shadow side of their roles. At present, this component does not align with the needs of the clients at Home Base, or the formal organizational mandate to engage in AO/AR, trauma-informed practices. As such, the critical issue of incongruence is the informal work culture within the organization. Previous attempts to align the organization with its new vision to effectively support a changing client group have been impeded by this informal work culture.

Although the homogenous identity apparent in the employee group does not reflect the marginalized and intersecting identities of their clients, Mullaly and West (2018) and Brown (2019) argue that support professionals with more privilege than their clients are able to provide

effective support when they engage in reflexive practices and operate from an AO/AR lens. For this reason, I have not identified the homogeneity of the group as necessarily incongruous to the mandate of the organization. Nonetheless, I believe that the reality employees have constructed from their homogenous identity is exacerbating their inability to support marginalized clients and engage in trauma-informed AO/AR practice.

Currently, because of the inconsistency in organizational components, the organizational outputs reflect service provisions that are misaligned with the organizational mission, vision, and practice framework; causing conflict and liability for the organization. By addressing the obstacles apparent in the Home Base culture, our organizational components will come into alignment, and it is reasonable to expect that the organizational outputs will better reflect the needs of organizational stakeholders and align with organizational mandates. The gap analysis explored through the congruence model of organizational behaviour is further supported by the findings of my change readiness results. As described in chapter 1 of this OIP, the change readiness findings determined by Kezar's (2018) measure suggest that the organization is structurally prepared for this change. As shown in Figure 3, the work, formal organization, and (to a lesser extent) people involved in the change are reasonably aligned. However, the informal organization (shelter culture) remains out of alignment with the other dimensions of the model. To this end, the findings of this gap analysis support Deszca et al.'s (2020) change readiness results which highlighted the psychological and emotional elements of change that factor into the informal organization (shelter culture).

Possible Solutions to Address the PoP

This project aims to improve the AO/AR praxis within a crisis shelter that serves women and children fleeing DV. This section contemplates four possible solutions for the organization and determines the benefits and drawbacks for each. These solutions include: (1) maintaining the status quo; (2) offering pre-existing online training to the group; (3) offering pre-existing live

training to the group; (4) implementing a comprehensive, interactive guided-learning program for the employees. Each option will be evaluated using the same adjudicating criteria: cost-effectiveness, ability to meet the curricular needs of the organization, ability to respond to the emotional and psychological needs of the learner, and the effectiveness of each strategy to drive AO/AR learning. In determining the effectiveness of each strategy, I will consider how the solution aligns with Broido's (2000) finding which identified "increased information on social justice issues, engagement in meaning-making processes, and self-confidence" (p. 7) were critical components for effectively integrating socially just paradigmatic shifts.

Maintaining the Status Quo

Since the previous failed attempts at engaging the staff in AO/AR training, organizational leaders abandoned their effort and no further attempts have been made to address this problem for approximately 3 years. If the organization were to maintain the status quo by continuing to refrain from intervening, the current circumstances would remain on the same deteriorative path. Shelter staff would marginally benefit from the continued prioritization of their psychological security as they have been in recent years; however, as DiAngelo (2011, 2018) notes, centering the comfort of White people as the sole priority in attempts to address racism reinforces racist systems. This solution presents no upfront costs to the organization, but clients would continue to experience troubling racist and oppressive interactions with the employee group that further marginalizes the vulnerable clients. The dynamic also presents a considerable risk of liability to the organization, both from potential lawsuits and reputational damage. Additionally, as has been observed within the organization in recent years, the therapeutic relationship between clients and employees would further degrade, contributing to diminishing engagement among staff. Finally, as illustrated in the congruence model (Nadler & Tushman, 1999) shown in figure 3, the organization would remain misaligned in practice, offering services that are incongruous with its mission, vision, values, and policy.

Ethically speaking, maintaining the status quo is not a realistic alternative to taking action. As each day passes without addressing the problem, women and their children face the risk that they will be exposed to harmful behaviour from staff. This harmful behaviour has a negative impact on their lived experience and contributes to their further marginalization. Moreover, this option calls the integrity of the organization into question, and undermines the transformative leadership approach that is fundamental to this project (Kouzes & Posner, 2010).

The following chart adjudicates option one based on key criteria. This option was rated as highly cost effective because there are no upfront costs to maintaining the status quo; however, it is important to note that there are costs associated with reputational damage and civil redress that are not captured here. This option fails to meet the curricular needs of the organization, but does not impinge on the sense of psychological and emotional security of shelter staff. As demonstrated in the practices of shelter staff, maintaining the status quo has not assisted in their ability to integrate AO/AR theory with their professional practices. This option fails to improve their knowledge of social justice issues, engagement in meaning-making processes or self-confidence.

Table 1

Criteria Adjudication for Solution 1

Considerations	Low	Medium	High
Cost-Effective			■
Curricular Needs Met	■		
Needs of Learners Supported		■	
Effective Learning Strategy	■		

Pre-existing Asynchronous Online Training

Option two is offering the group a pre-existing asynchronous online training program. In the past, they have completed asynchronous online programming related to workplace

harassment training which included an applied interpretation of human rights legislation. Although all shelter staff managed to successfully complete the program, they provided feedback to the organization that the training felt like punishment and was generally poorly received. Nonetheless, there are a number of important benefits to this option. Pre-existing asynchronous online training programs are lower cost than custom programs, and require fewer logistical arrangements to accommodate employee shifts (Browne et al., 2021). There is minimal lead time required to implement such programs (Browne et al., 2021), many of which cover a vast array of topics relevant to this group. Additionally, programs may be offered in serial modules to allow participants time to digest and integrate the material at their own pace. Dorlee (2021) offers a list of hundreds of pre-existing, self-directed, asynchronous learning resources that could support this solution.

Pre-existing online training does not meet all of the identified needs of this project. By using a pre-existing online training program, organizational leaders will be unable to facilitate, demonstrate, relate to, integrate and co-create the learning culture with the team. As such, this solution undermines the CRT research that indicated AO/AR learning was most effective when led by engaged organizational leaders (Welton et al., 2018). Moreover, pre-packaged material may not meet the employee group where they are in their learning, and lacks the flexibility to adjust to learner needs. Curriculum for these programs is developed by external agencies, and based on a more general sense of training needs. Additionally, the group may be apathetic to asynchronous online learning, considering their feedback related to previous experiences and resistance to the material. Broido (2000) found that actively engaging learners in AO/AR learning was critical in driving their ability to integrate the content, a significant challenge for asynchronous, online programs. Asynchronous online learning offers limited opportunity for facilitators to engage with learners and steward them through the learning process, or observe the group over time to analyze changes in their practice. Finally, the shelter staff do not have an established, trusting relationship with online trainers, a fundamentally important element to the

TL (Bass & Avolio, 1994; Brown, 2018; Shih et al., 2012) and transformative leadership

approaches (Caldwell et al., 2012; Kouzes & Posner, 2010).

Although pre-existing asynchronous online training programs are a viable option under

other circumstances, considering the current and particular needs of this organization,

implementing this option does not align with the project goals of guiding the staff through a

paradigmatic shift that will support appropriate AO/AR practice. Moreover, the group has

demonstrated resistance to asynchronous online training in the past, and it is important that

leaders consider whether the format of training contributed to their resistance.

This option is cost effective, and could meet some of the curricular needs of the group,

however offers no support for their emotional or psychological needs. Although it provides

additional information related to AO/AR learning, it is not a strong option for engaging the group

in meaning-making processes or building their self-confidence.

Table 2

Criteria Adjudication for Solution 2

Considerations	Low	Medium	High
Cost-Effective			■
Curricular Needs Met		■	
Needs of Learners Supported	■		
Effective Learning Strategy	■		

Pre-existing Live Training

Option three is offering the group a pre-existing in-person training program. The group

has participated in pre-existing live training in the past, but it was poorly received. Nonetheless,

there are many ways this option addresses the needs of the group. As with option two, pre-

existing live training is a cost-effective solution, and requires minimal lead time to implement.

There are a vast range of training programs available, covering myriad relevant topics supporting AO/AR praxis. Programs are available that spread the learning over multiple sessions to allow for digestion and integration, however such programs typically involve higher cost. Finally, live training allows some degree of flexibility and responsiveness based on learner needs.

Although live training is a viable option, there are many ways this solution does not meet the needs of this project. Because shelter staff work a 24/7 rotating shift schedule, there are some logistical considerations involved in ensuring all staff can be present at the same time. In all likelihood, the organization would need to implement two cohorts for the training which has a significant impact on training costs. In addition, unless the live option is offered in multiple sessions over time, the format forces staff to process their learning as it is happening and in front of their colleagues. Finally, the group does not have an established trusting relationship with external trainers, and has demonstrated hostility towards them in the past. As a result, this option does not support a trusting and vulnerable relationship between leader and followers as described in LMX (Moorman, 1991; Scandura, 1999; Shore & Shore, 1995) and foundational to the TL (Bogler, 2001; Griffith, 2004; Leithwood & Jantzi, 2006) and transformative leadership approaches (Kouzes & Posner, 2010).

As with asynchronous online learning, live training offers some benefits, but fails to meet the needs of the organization. Nonetheless, there may be a way to incorporate options two and three into the sustained AO/AR planning for the future of the organization. This solution is relatively cost effective and meets some of the curricular needs of the organization. Due to the interactive nature of this option, there is greater capacity for the facilitator to support the emotional and psychological needs of the learners. Finally, this option provides learners with increased information related to socially just practices, some level of engagement in meaning-making processes, and the interactive approach is likely to have a positive impact on their self-confidence.

Table 3

Criteria Adjudication for Solution 3

Considerations	Low	Medium	High
Cost-Effective			███████
Curricular Needs Met		███████	
Needs of Learners Supported		███████	
Effective Learning Strategy		███████	

Comprehensive Guided Learning

The final solution I have considered for my project involves developing a curriculum tailored to the needs of the organization. To this end, training would consist of eight weekly, live, 1-hour sessions supported by asynchronous, self-directed learning based on readings and practical exercises, as recommended by Easton (2011), Goldenberg and Gallimore (1991), and Joyce and Calhoun (2019). Curricular elements of this program include:

- Engagement in self-administered, evidence-based testing (Greenwald & Banaji 1995) to help participants identify their implicit bias with some degree of privacy

- A comprehensive introduction to AO/AR principles, including application of definitions to systems and circumstances

- Reconciliation of positionality within systems of oppression

- Opportunity for leaders to model vulnerability and AO/AR principles in practice

- Guided, experiential learning underpinned by an accessible and respected AO/AR text

- Simulated opportunities to integrate practical principles of AO/AR through experiential learning

- Time to reflect on and process materials alone and with the group

- Synchronous and asynchronous engagement to ensure access for shift workers

- Extended timeframe for curriculum delivery, to allow leaders to adjust to the needs of the group

Curtis and White (2013) found that complex behavioural change requires a comprehensive and sustained effort in order to foster change. Through this interactive, responsive, focused, and tailored program, leaders will have an opportunity to engage with their employees as they build a foundation to support them in AO/AR praxis. Typically, such a program would be cost-prohibitive, particularly for a not-for-profit community service agency. However, I am offering the development of this program to the organization pro bono as a gesture of gratitude for their support of my education.

This option integrates many of the effective components of option two and three, but allows for a degree of tailoring and responsiveness that were not available from those options. Providing learners an opportunity to engage in experiential learning practices in the field of social work improves learner self-confidence in the material and helps to bridge their theoretical understanding with job-embedded praxis (Hsiao, 2021). This option aligns with andragogical best practice, and offers an opportunity for organizational leaders to support engagement in meaning-making while modeling allyship, vulnerability, and care for the staff.

Table 4

Criteria Adjudication for Solution 4

Considerations	Low	Medium	High
Cost-Effective			■
Curricular Needs Met			■
Needs of Learners Supported			■
Effective Learning Strategy			■

Recommended Solution

In considering the options available to the organization, I recommend the comprehensive guided learning program to address the PoP. The flexible nature of the curriculum is supported by a SL approach. To this end, the needs, maturity, and capacities of the group can be assessed and engaged with as their learning unfolds (Sánchez Santa-Bárbara & Rodriguez-Fernández, 2010). Using an iterative curriculum (that will be further explained in following sections) allows for the integration of solutions to many of the barriers to change that have been identified throughout the first chapter of this OIP.

In their research on health inequities among marginalized groups, Carter and Mazzoni (2021), argue that successful, equity-focused interventions require practitioners to undertake a paradigmatic shift in their understanding of the problem by examining the systemic perpetuation of racism and oppression. My project aims to facilitate this kind of paradigmatic shift in the way that shelter staff understand and interpret the world around them. To this end, it is reasonable for my plan to account for personal, psychological, practical, social, cultural, educational, and situational needs to support this change.

Considerations Related to Staff and Culture

Shelter staff share common lived experiences; in addition to their demographic heterogeneity, the group shares the identity of survivors of DV. Research suggests that DV survivors experience long-term psychological impairments, which may be exacerbated by change (Astbury et al., 2000; Matud, 2005). In addition, the group may express increased resistance to the material due to the previous unsuccessful attempts at making this change, and their enduring sense of shame, harm and damage that resulted. The Home Base staff team is made up of women from different educational backgrounds. Although many have formal education in some area of human services, few staff members have formal social work backgrounds or educational exposure to AO/AR concepts. In addition, team members have various levels of comfort and skill with technology, and may require support in accessing online

material. As a result, the program will need to assume a beginner level of technological skill and AO/AR understanding.

Practical considerations include the rotating 24/7 shift schedule and related impact of working in a unionized environment while requiring participants to engage in 2-3 hours of extra work per week for the program. In addition, there is limited funding to support this initiative, although the development of the program is free, there are material costs and hourly rates of staff to consider. Fortunately, the costs of this program have been factored into the organizational professional development budget for the upcoming fiscal period.

The work culture is spiritually-framed and oriented towards Christian faith. Staff have demonstrated resistance to considering the shadow side of their work and when challenged, have responded in a manner consistent with White fragility. It is possible that current events in the media and within the local community have shifted their understanding of systems of oppression in the 18 months since the workplace assessment. However, consideration and care will be required in engaging the group with this material to avoid alienation and overcome resistance. The group are co-constructors of their reality, and generally cohesive with a strong sense of respect among team members and positive regard for senior leaders. This intervention will be tailored to the established needs of the organization and work group, but informed by relevant research and evidence to support the construction of this guided-learning curriculum.

It is important to recall that the intention of this intervention is not to cure the organization of racism. Rather, the project aims to engage the staff in an intermediary learning program that will prime them to continue to build their AO/AR capacity by developing their resilience in accepting challenging messages about racism and oppression. Instead of prioritizing the comfort of the employees at the expense of their clients, this solution aligns organizational mandates by prioritizing the clients right to fair, equitable, and just support.

Having considered four possible solutions to my PoP, I have established that the more comprehensive, guided learning program offers staff the kind of support required to engage in

the desired paradigmatic shift. The attention to the psychological needs of the participants aligns well with Deszca et al.'s (2020) four stages of change: awakening, mobilization, acceleration, and institutionalization; further incorporating the GVV curriculum into the training will honour the challenging nature of the material being covered, providing the time and support that staff require to digest and integrate the learning. Offering the program in a less confrontational setting, with a focus on capacity-building curriculum, and facilitated by trusted leaders, this solution aims to overcome the previous barriers to change.

Leadership Ethics and Organizational Change Issues

In this section, I will engage a social constructivist lens to understand and interpret the role of ethical leadership in this change. Drawing from Liu's (2017) work on the relational nature of ethics in leadership, I will explore the ways change leaders and shelter staff can engage in the principles of relational ethical leadership in driving change that seeks equality, justice and emancipation for marginalized clients. I will then build on this understanding of ethical leadership by discussing the implications of power, privilege, and oppression on the relational interactions of organizational leaders, shelter staff, and shelter clients. To this end, I will argue that the role of shelter staff is more closely aligned with the experiences of their organizational leaders than to those of their clients. I will also discuss how the AO/AR goals of this project concurrently support the organization in realizing the calls to action made by The Truth and Reconciliation Commission of Canada (TRC). Finally, I will examine the responsibilities of the organization in prioritizing equity, social justice, and decolonization in practice.

Ethical Leadership

Traditionally, ethical leadership scholarship has focused on philosophical or social scientific approaches (Fine; 2017; Fletcher, 2004; Liu, 2017). Philosophical approaches tend to focus on creating a model for ethical leadership that is rooted in the leader's values, responsibilities, and virtues (Northhouse, 1997). Social scientific approaches consider how

ethical leadership is contextually experienced and perceived by followers (Brown & Mitchell, 2010; Fine 2017). Liu (2017) is critical of both of these traditional approaches, noting that ethical leadership is not a static, power-neutral exercise. Liu (2015, 2017) and Fletcher (2004) also criticize traditional views of ethical leadership for perpetuating and reinforcing systems of oppression, by sacralising leadership practices and ignoring the shadow side of leadership; much in the same way the spiritually-framed shelter team has done with their own work. Liu (2017) situates ethical leadership as relational rather than philosophical or social scientific, an understanding that aligns with the fundamental elements of SL and LMX (Scandura, 1999) which prioritizes the development of positive, dyadic relationships between leaders and members of their team (Fine, 2017; Hersey & Blanchard, 1969). For example, this project requires that leaders respond to the affective state of staff as they experience positioning themselves within systems of oppression. The role of leaders in that moment will not be helping them understand the concept writ large, rather supporting them as they integrate this knowledge into a healthy model of self. It is through a contextual understanding of AO/AR learning and the predictable discomfort of the process (DiAngelo, 2011, 2018; Linder, 2015) that leaders can respond and adapt in support of the development of these learners.

Liu (2017) argues that ethical leadership is a product of relational interactions and should be conceptually divorced from the traditional understanding of ethics and leadership as based in rational, autonomous actions by an individual. She further contends that ethical leadership is contextual and driven by a desire to overcome systemic barriers to equity (Liu, 2017), a perspective that underpins this project. The social constructivist lens she espouses is also apparent through my OIP and fits well with the project's goals.

Many of Liu's arguments relating to ethical leadership mirror the challenges being experienced within Home Base. I believe these parallels can deepen our understanding of the dynamics between shelter staff and clients. Insofar as critical leadership scholars (Alvesson & Spicer, 2012; Collinson, 2014; Fletcher, 2004; Liu, 2015, 2017; S´liwa et al., 2012) challenge the

notion that leadership is power-neutral and based in the individual virtues of people in leadership positions, so too are organizational change leaders challenging the shelter staff to understand their role as not being power-neutral and situated in a system that negatively impacts their clients irrespective of the staff members' own personal values. To this end, the GVV curriculum will support the staff as they engage in critical reflection of their own values and how they influence the experiences of their clients.

Liu describes ethical leadership as "a collective political project that calls for dialogic engagement towards the goals of equality, justice and emancipation…" and as a "force to subvert unequal structures of power" (2017, p. 345). To this end, her definition of ethical leadership aligns with the transformative leadership approach, as well as the organizational values, mission, and vision. Moreover, the paradigmatic shift that Liu suggests in her research reflects what I hope to support through this project.

Power, Privilege, and Oppression

Given that my project and organization are grounded in the principles of equity, social justice, and decolonization, it is important to clearly situate change leaders, shelter staff, and clients within the context of the organization. Figure 4 illustrates various shared and unique power dynamics impacting the client group, shelter staff, and organizational leaders.

Figure 4

Power-Privilege-Oppression Diagram
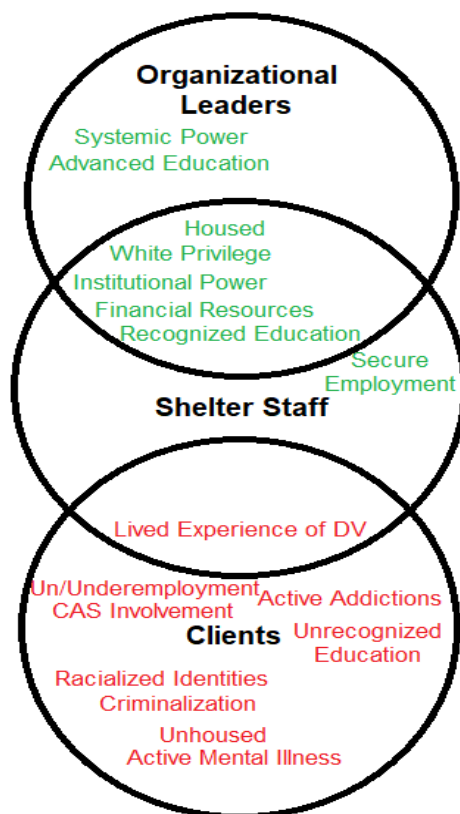
The areas where the circles overlap show some of the salient traits shared between each group. Red indicates that the trait is related to experiences of diminished power and privilege, green indicates that the trait affords some degree of power and privilege. When viewed in this way, it is apparent that shelter staff have considerably more power and privilege than their client group, and in fact, share much more in common with organizational leaders.

In previous chapters I have discussed the challenges I anticipate in convincing the shelter staff that they experience relative privilege in comparison to their client group. When contemplating the interplay of power, privilege, and oppression within Home Base, the group has struggled to acknowledge the advantages they experience. Instead, they have argued that because they are women, working class, and survivors of DV, they have been similarly impacted by oppression when compared to their clients. Embracing the real privileges that are

afforded by their positionality is fundamentally necessary for this paradigmatic shift to take place.

Truth and Reconciliation

The TRC report describes the myriad ways that Canada's legacy of Indigenous cultural genocide has harmed generations of Indigenous people (The Truth and Reconciliation Commission of Canada, 2015). The TRC contends that political, economic, educational, health, social, and legal systems continue to disadvantage Indigenous people, often resulting in institutionalization, violence, and substance abuse (The Truth and Reconciliation Commission of Canada, 2015). The TRC argues that there is a lack of funding and support for culturally appropriate services, resulting in the continued perpetuation of harm against Indigenous communities (2015). Indigenous people in Canada face higher rates of criminalization, imprisonment, involvement with child welfare agencies, poverty, DV, substance abuse, and social isolation (The Truth and Reconciliation Commission of Canada, 2015). Although Home Base does not currently record the race of their clients, considering their various intersecting marginalized identities, it is likely that some shelter clients identify as Indigenous.

Regan (2010) argues that the work of decolonization starts from within settler communities. By disavowing the historical narrative of settlers as peacemakers and helpers, and acknowledging the role of White colonizers in ignoring and devaluing traditional Indigenous practices, settlers can begin the transformative work of decolonization (Regan, 2010). This OIP endeavours to begin this process, and work towards redressing ongoing harm faced by Indigenous people. The TRC calls on leaders to make the following changes which apply to shelter operations (The Truth and Reconciliation Commission of Canada, 2015):

- Keep families together when safe, and ensure they have access to culturally appropriate environments regardless of where they reside.

- Ensure that social workers receive proper training to understand the historical legacy of systemic oppression impacting Indigenous communities, and the potential for Indigenous community members to offer solutions and healing .

- Ensure the accessibility of culturally appropriate victim services programs for Indigenous people that are monitored, evaluated, and reported.

This OIP will incorporate and support the TRC calls to action that relate to the shelter in three key ways. Firstly, despite being directed by leaders to do so, Home Base staff have historically refused to record race information for clients (in alignment with their "colourblind" lens). This project aims to shift them away from the "colourblind" paradigm, towards a more contextually informed understanding of oppression. Armed with the calls to action informed by the TRC report, the organization will be enforcing a mandate to collect information about the race/creed of clients upon intake. This practice will support a more accurate record of access data and client engagement. Secondly, there is currently no culturally appropriate programming offered to clients. This project supports building acceptance among shelter staff for the development of such programming with partner agencies since there are no current staff members with the traditional Indigenous knowledge required to develop and implement such programming. Finally, by working towards a new paradigmatic understanding of racist and oppressive systems, this project will support the shelter in accepting and integrating continued AO/AR learning related to colonial historical legacies offered by Indigenous knowledge keepers, an initiative that the organization is committed to.

Organizational Responsibility

The organization has some additional responsibilities to consider in relation to this project. At the forefront of this initiative is the safety, welfare, and equity of the client in accessing supportive, respectful, and appropriate services. As Liu (2017) described, these services must be considered as relational and taking place within political and social context, so they cannot be understood as a proscriptive, step-by-step handbook approach to client care.

Instead, staff must come to understand their relational interactions with clients through a corporeal lens. Doing so requires that staff understand client interactions as occurring within context, and deeply informed by their client's experiences in their body based on the way their body is perceived by others, as well as the access these perceptions provide or prohibit.

In addition, the organization must continue to consider their role within the community to change the landscape of client services. At an organizational level, there are certain reputational risk to remaining with the status quo that have been explored in previous sections. The initiative as described in this OIP offers the organization an opportunity to engage as AO/AR leaders within the community.

Dale and Frye (2009), argue that vulnerability and love are necessary components of learning and should be embraced in relational practice. In supporting this program, and in alignment with the principles of TL, the organizational change leaders aim to build this sense of vulnerability and love within the project to support the relational nature of the change taking place. Corlett et al. (2019) challenge leaders to embrace relational vulnerability as a vehicle for openness, trusting relationships, and building capacity for new ways of being and learning. By modeling loving vulnerability for shelter staff, project leaders will support their need for a sense of safety that encourages taking risks in their learning. Nonetheless, it is a similarly important responsibility of organizational leaders to remain focused on balancing the staff's sense of safety with a level of assertive direction and encouragement towards growth. The aim of this project is to guide the group out of a stagnant and problematic understanding of race that prioritizes their own desire to feel safe at the expense of the need to change. To this end, the need to change supersedes the need for emotional safety (DiAngelo, 2011, 2018), however both can and do coexist.

The ED is committed to bringing internal culture into alignment with organizational expectations. She understands this task and the context it must take place in, and concurs with the priorities as outlined above. The ED and I share a sense of responsibility for dismantling

systems of oppression, and believe that shelter staff will align themselves with this cause when given a safe and considered opportunity to adjust their lens.

Chapter 2 Conclusion

Whereas chapter 1 presented my PoP and situated it within the organizational context, chapter 2 has identified and described my integrated leadership approach, weaving together aspects of TL, transformative leadership, and SL in support of the change. Bolstered by this integrated leadership approach, I determined that Deszca et al.'s (2020) change model is the most appropriate framework for leading this change, but is strengthened to better suit this problem by incorporating elements of Gentile's (2010) GVV curriculum. Next, I conducted a critical organizational analysis using Nadler and Tushman's Congruence Model. I then considered four possible solutions to the PoP, and explained how the solution could be implemented using a PDSA model. Chapter 2 concludes with a discussion on leadership ethics, social justice, and organizational responsibility related to this project.

Chapter 3: Implementation, Evaluation, and Communication

In the first chapter of this OIP, the PoP was introduced and contextualized, underpinned by relevant research in leadership, change management, and organizational development. Chapter 2 integrated the PoP, organizational context, introduced my integrated leadership approach to the PoP, and presented relevant research to develop a plan that addresses the problem. The third chapter details a strategic approach for implementing the plan (Joyce & Showers, 1982; 1996; 2002; Kolb & Frohman, 1970), monitoring change and evaluating the project (Christoff, 2018; Connelly, 2021; Langford, 2015; Leis & Shojania, 2017; Reed & Card, 2016), and communicating the change (Armenakis & Harris, 2001; Lavis et al., 2003; Miller,1980; Skipper & Pepler, 2021; Stiff & Mongeau, 2016).

Previous chapters have identified participant resistance as the most significant challenge to the success of this project. To this end, strategic and considered communication is foundational to the effective implementation of this project. The very purpose of this initiative is to diminish participants' reflex to resist AO/AR learning so that they have capacity to offer equitable, socially just support to their clients. As such, program facilitators will be expected to balance the psychological needs of the participants, with the community's need for AO/AR support. Armenakis and Harris' (2001) model for communicating change will work in tandem with the PDSA model to monitor and effectively respond to the needs of the group.

Change Implementation Plan

My plan is framed through a change management lens described by Van Tiem et al. (2012) as: "a process whereby organizations and individuals proactively plan for and adapt to change" (p. 61), rather than a derivative step-by-step guide to leading change. To this end, I have woven elements of flexibility and responsiveness into the plan. I have made a considerable effort to develop a thorough understanding of the shelter staff culture, and

appreciate that despite significant preparation, the need to adapt this plan may still arise during the process.

Foundationally, the intervention I am planning will use TL to draw from Joyce and Showers' (1982; 1996; 2002) findings that behavioural changes for entrenched practices were only effective when approached wholistically and with sufficient time and support for employees to integrate the changes. Throughout this section, I will refer to Appendix C which contains a draft of the instructional framework for this project. The learning elements planned for this intervention are informed by research identifying the most effective means of leading complex behavioural change that is tied to altering personal values. The instructional framework underpinning this project will be examined, including the practices of learning for mastery (LM), direct instruction (DI), and simulation.

Model for Planned Change – Planning

Whereas chapter 2 discussed the application of the CPM to this PoP in support of the employees, MPC speaks more to the change intervention as it relates to the needs of, and relationship with, the client. Having completed the first three stages of Kolb and Frohman's (1970) MPC (scouting, entry, and diagnosis), this project is now in the fourth stage, planning. Throughout the change process, Kolb and Frohman (1970) emphasize the importance of cooperation between an organizational development consultant and their client. They contend that cooperation during the planning phase of such projects helps ensure that the plans will suit organizational needs, are understood by key leaders, and that future outcomes will benefit from the support of leaders who are invested in their sound execution (Burnes & Randall, 2015; Cha, 2007; Ciampi, 2008; Kolb & Frohman, 1970; Robbins & Judge, 2009). As discussed in previous chapters, this approach is consistent with the approach I have taken throughout this process.

Kolb and Frohman (1970) suggest that a consultant first engages with their client by clearly defining the specific behavioural objective that the organization aims to achieve through

the planned change. Mager (1962) argues that if the objectives are defined specifically enough, there is often little else required to solve the problem. Kolb and Frohman (1970) also add that formulating specific objectives simplifies the evaluation process that follows. To this end, and in consultation with the ED of the organization, the specific objectives of the project include:

1) Guiding participants in developing AO/AR praxis.

2) Providing a supportive learning environment that allows participants to engage in meaningful and challenging learning, mitigating the risk they may feel alienated or attacked.

3) Providing learners with tools and strategies to identify and challenge racist and/or oppressive behaviour in themselves and others.

4) Engaging the participants in developing a sustained interest in AO/AR learning and praxis.

To this end, the planned change model provides a framework that honours my relationship as an external contractor with the ED of the organization.

Upon establishing these objectives, we prioritized first the needs of the clients to access safe and supportive, AO/AR crisis services. Secondly, we recognized and included the developmental and emotional needs of the participants within the teaching framework. This consideration ties back to Deszca et al.'s (2020) change framework supported by GVV (Gentile, 2010), which recognizes the psychological impact and needs of employees as they adjust to change. Third, we incorporated the organization's need to align services with their AO/AR policy and mitigate the risk that employees will continue to engage in harmful behaviour or cause clients to seek financial redress. Finally, we considered the need within the broader community to have a culturally safe, AO/AR crisis shelter service available to the public. I believe that within this intervention, the needs of these different groups of stakeholders are met in a harmonious

and comprehensive manner, and our objectives reflect a strong desire to offer socially just, ethically sound support services to the community.

Upon establishing clear objectives, the next step of this process involves generating alternative solutions or change strategies and considering the outcomes of each alternative (as discussed in chapter 2) (Burnes & Randall, 2015; Ciampi, 2008; Kolb & Frohman,1970). Kolb and Frohman (1970) propose classifying each alternative based on two dimensions: source of power and organizational subsystem. In the case of this project, our power is both trust-based (meaning that as leaders, our power is derived from the trusting relationship we have established with the employee group), and expert power (meaning that the group understands the leaders as a reliable resource to steward this change). The organizational subsystem being addressed is primarily the people subsystem which includes educational programming aimed at changing motives, values, and skills (Kolb & Frohman, 1970). The policy/culture subsystem also factors into how we understand this change, as it speaks to the organization's values and norms: expectations among peers, types of behaviour that is rewarded or punished, and conflict management (Kolb & Frohman, 1970). People and culture are significant considerations for the implementation of this project, since the plan relies on developing openness to change within the workplace culture.

Leading Complex Behavioural Change

As discussed in previous chapters, in referring to complex behavioural change, I am speaking of behavioural change that is tied to the personal values of participants. In some cases, participants may have personal values that conflict with the intended behavioural changes, requiring a more complex intervention. Simple behavioural changes, like implementing a new version of software for example, can often be made with the support of a "one-off" intervention, like a video or manual (Kang, 2015). Kang (2015) argues that one-off workshops are only effective for disseminating information, and fail to support complex change, like the

change proposed in this project. To this end, the CPM will guide the development of this project, as the TL approach woven throughout the model is well suited to accommodate the needs of employees while implementing the change.

Although their research focuses on facilitating behavioural changes among teachers, Joyce and Showers (1982, 1996, 2002) offer key points of guidance that support change in a broader setting. It is notable when comparing the two groups, that educators are demographically similar to the shelter staff team, often trending towards White, middle-aged, women (National Center for Education Statistics, 2021). Among other similarities; teaching is also a helping role, wherein staff aim to assist their clients (students) in developing skills that will improve their lives, similar to the role of shelter staff in relation to their clients. Although Joyce and Showers' work relates more directly to teacher training, it remains relevant to the complex behavioural change I am leading among Home Base staff.

Joyce et al. (1992) and Joyce (2015) identify the most effective way to support behavioural systems changes as: LM, DI, and simulation. To this end, the professional development program that is foundational to this change plan will include elements of each, aligning well with the CPM and GVV curriculum, which uses a TL approach to leadership. The four key facets of leadership identified in TL include: influencing followers, inspiring motivation, intellectual stimulation, and individual consideration (Bass, 1985). The proposed training program incorporates each of these facets throughout.

Learning for Mastery

The LM instructional framework was introduced by Bloom (1968). LM proposes that all learners must demonstrate a level of mastery in foundational concepts before moving on to the next phase of learning (Bloom, 1968; Dunn et al., 2016; Lawrence et al., 2006). In alignment with the TL principle of individual consideration (Bass, 1985), if a student does not demonstrate a strong foundational understanding of the material, they will be provided with additional

learning opportunities, and given another chance to demonstrate their knowledge (Bloom, 1968; Dunn et al., 2016; Lawrence et al., 2006). In LM, no learner is left behind; the practice incorporates the entire cohort into the teaching pedagogy, with learners supporting each other and working cooperatively with the instructor to achieve mastery of the material (Bloom, 1968; Dunn et al., 2016; Lawrence et al., 2006). This element of LM is well-aligned with the TL principle of influencing followers (Bass, 1985), while also recognizing the needs of the spiritually-framed group by supporting the co-creation of their reality and identification with each other through shared experience (Zohar, 2010). Due to the level of commitment required to facilitate LM learning, the practice is less common than more traditional learning pedagogies despite its efficacy (Grittner, 1975; Haelermans et al., 2015). One of the operational strengths of the workplace culture at Home Base, is the cohesion and team-orientation of the group. Leaders will need to take care to ensure that this team-orientation is leveraged to build support and unity among participants for this change as espoused by LM, rather than cohere in resistance to it.

Decades of research evaluating the efficacy of LM teaching practices found that the method was highly successful when implemented properly (Guskey, 2008, 2017). In their meta-analysis of 46 studies, Guskey and Pigott (1988) found favourable, consistent positive impact of LM on achievement, retention, engagement, and attitudes towards the learning. Notably, they found that these positive results were more pronounced when the subject matter related to the area of social sciences when compared to most other disciplines (Guskey & Pigott, 1988). Cundiff et al. (2020) attribute these findings to LM's focus on the application of learning to a concept or to solve a problem, rather than rote memorization of facts. The material being covered in this training will present CRT through a sociological lens to build capacity among staff; this goal is well-aligned with the principles and practices of LM.

LM will be included in the learning program in a variety of ways; most notably, facilitators will assess the groups comprehension of applied skills through participatory learning and

demonstration. The skills of the participants will be compared to expectations outlined on a rubric for each subject covered. As participants meet the expectations described in the rubric, they will engage in offering feedback and support to other participants who are struggling with the material. The group will only move on to the next topic when a level of mastery has been demonstrated by each participant.

Insofar as my project will incorporate the foundational elements of LM into curriculum development, it will diverge from some of the other traditional elements of LM philosophy. Notably, multiple choice testing is commonly relied upon in establishing student mastery to move on to the next level of learning. Based on the complexity of material we will be covering in our training program; such testing is not appropriate and will not be the primary means of establishing that an employee has achieved a level of mastery. Instead, learners will largely demonstrate mastery through role-playing, reflection posts, and interrogation of case studies. Facilitators will maintain high performance standards for these alternate means of "testing." The LM approach to learning, aligns most closely to the mobilization stage of the CPM. To this end, LM will be critically important in setting the tone for the learning by creating a space where it is safe for participants to be vulnerable. During this phase of the learning, leaders will rely more heavily on coaching and supporting the learners as they work to integrate the information and build their capacity.

Direct Instruction

Direct instruction (DI) refers to the explicit teaching of a defined skill set using demonstrations, lectures, tutorials, participatory classes, discussions, seminars, active learning, workbooks and observation (Engelmann, 1968; Kim & Axelrod, 2005). Typically, the model follows a standard approach where the facilitator demonstrates the behaviour, then leads the learner in doing it together, then monitors the learner while they try it alone (Kim & Axelrod, 2005). DI can be further broken down into seven steps: setting clear learning intentions,

establishing the criteria for successful performance, engaging learner interest and attention, presenting lessons, guided practice, review and clarification, and independent practice (Hattie, 2009). This approach incorporates the TL principles of individual consideration approach to this project, in that it incorporates the facets of intellectual stimulation and inspiring motivation (Bass, 1985) into the change plan through the content covered in the text. The principles of DI are also reflected in the use of a guiding text as a core element in the development of this program. The topics covered in each chapter of the text form the outline for this training, and the text includes guided practice, criteria for successful performance, presentation of lessons, review and clarification of concepts, and engages the learner with stimulating content in alignment with DI.

DI and LM align relatively well with each other, because LM addresses the "how" of the learning plan whereas DI focuses more on the "what." According to Hattie (2009), DI differs from other pedagogical techniques because it also includes the following guidelines:

- 90% of the material is review, and only 10% incorporates new information

- Learners are given a pre-test to evaluate their level of knowledge prior to the training which is used to group the learners based on their skill level

- Learning is paced to match the needs of the learners, and is responsive to their cues

For this project, elements of DI will be incorporated into the program to the extent that doing so aligns with the LM approach. To this end, the learning will be paced to match the needs of the learner, and a high percentage of the material covered will be review, with new material woven into curriculum in small chunks. Learners will also be evaluated prior to training to assess their level of knowledge, but we will not group the participants based on their results. Instead, we will prioritize the cooperative group learning elements of LM.

In a meta-analysis of 304 studies related to the efficacy of DI, Hattie (2009) found that the approach was highly effective in driving learner achievement. Although incorporating every

element of DI is not practical for this project, it offers valuable guidance and supports effective construction of the curriculum. DI aligns with the awakening phase of the CPM, insofar as it supplies the conceptual information to learners and sets clear expectations and goals. With respect to Hersey and Blanchard's situational leadership model, the leadership interventions appropriate to this kind of learning are directing and coaching.

Simulation

Simulation training offers learners an opportunity to practice their skills using virtual scenarios (Plotzky et al., 2021). Such training can incorporate specialized equipment, interactive virtual reality, actors, and/or programmed artificial intelligence (Motola et al., 2013). This training method offers facilitators an opportunity to observe and evaluate learners in a controlled environment, record the interactions, and offer expedient feedback to the learner (Motola et al., 2013). Simulation training is particularly helpful when real-world training is cost-prohibitive or unsafe (Motola et al., 2013). With respect to this project, real-life engagement in the practical elements of AO/AR support would involve experimenting on vulnerable women accessing the shelter services, and not allow for standardized observation and feedback. As such, simulated scenarios are less harmful and more reasonable for this kind of learning. Moreover, simulations focus on the practical application of learning, and because the stakes are lower for the learner, they may be less inhibited in practicing a new skill in a safer environment (Plotzky et al. 2021). Due to the nature of the material being covered, it is reasonable to anticipate that participants will feel anxious and/or vulnerable while practicing their developing skills. For this reason, simulations will be particularly helpful in supporting an emotionally safe learning environment. Throughout the program, participants will be asked to demonstrate the application of their learning through role play, scripting, and case studies. This approach incorporates the TL principles of individual consideration and intellectual stimulation (Bass, 1985).

In a study on the efficacy of simulation training for social workers that focused on their acquisition of interpersonal practice skills, Gellis and Kim (2017) found that simulation training had a positive effect on clinical skill. These findings are consistent with several other studies (Edelson et al., 2008; Jeffries et al., 2008; Wolf, 2008) that found simulation training supported improved clinical skill performance and care. Kolb et al. (1991) also found that experiential learning is a highly effective means of creating behaviour change within an organization. Due to the nature of the material being taught and the kinds of resources available to the organization, technology-based simulators are not a realistic option. For the purpose of our training, role-playing scenarios will be the primary form of simulation operationalized. The resource text (Olou, 2018) offers scripted responses to racist comments, and provides the rationale that underpins these AO/AR responses. By engaging with this resource text both intellectually and practically, participants will benefit from the explicit directions of an AO/AR expert while they gain confidence to challenge harmful tropes during simulation. Simulation aligns with the acceleration phase of the CPM, and will require leaders to engage in supporting and delegating behaviour as employee capacity increases. The institutionalization phase of the CPM will happen following the training program, when employees return to their roles and have an opportunity to solidify their new skills.

The Learning Program

Rooted in the objectives established in concert with the organization, a plan emerged for a comprehensive professional development opportunity for shelter staff. The learning program will focus on supporting the group as they engage with challenging and meaningful AO/AR learning that will inform their praxis. In reviewing the outline for this learning program (Appendix C) it is important to consider the skeletal nature of the instructional framework, with an understanding that the program will be further developed as the psychological and intellectual needs of the group are established during the intervention.

Easton (2011), Goldenberg and Gallimore (1991), and Joyce and Calhoun (2019) emphasize the critical role of time, support from colleagues, focus, and opportunities for reflection when implementing complex behavioural changes. The CPM reflects Joyce and Calhoun's (2019) findings that professional development opportunities that provide participants with: the rationale for change (awakening), participation in the demonstration of skills (mobilization), and time to prepare for the use of newly developed skills (acceleration), in addition to ongoing peer coaching (institutionalization), resulted in a greater than 90% implementation rate in the short and long term. Based on these findings, I have incorporated all of these elements into the program. In particular, peer coaching empowers the group to co-create the new culture within Home Base, while also providing the benefit of continued support for the learning in the medium- to long-term. Peer coaches will be identified during the training program through their demonstration of knowledge and leadership.

Each element of the instructional guide draws from research-driven best practices in leading complex behavioural changes. Using a "book club" model, participants will read "*So You Want to Talk About Race?*" by Ijeoma Olou (2018) as a resource text. Over the course of 8 weeks, we will gather to discuss, digest, and consider two chapters of the book per week. The program will include multiple experiential learning opportunities to engage in self-reflection and practice applying their AO/AR knowledge in a supportive, simulated environment, mitigating potential harm to clients. In addition, facilitators will support learners in identifying and accepting their own positions within oppressive systems, and understanding the ways in which their power can harm or benefit the vulnerable clients they support. Following the completion of the program, participants will be able to anticipate how their conduct may impact clients and refrain from engaging in harmful and oppressive conduct towards them. Through this program, the group will develop additional capacity to offer marginalized clients culturally sensitive and

meaningful support, and identify and appropriately intervene in situations that could be experienced as racist or oppressive.

Building this learning program is an iterative process, and space will be left within the guide for flexibility and responsiveness to participant concerns. Through consultation with organizational leaders, MPC (Kolb & Frohman, 1970) was used to identify the need for change, and develop the objectives for this training program. The CPM (Dezsca et al., 2020) and GVV (Gentile, 2010) curriculum further guided the development of this program as it related to the cognitive and psychological needs of the employees. To this end, the training framework that I chose for this program encourages a high level of responsiveness to the needs of the stakeholders. Notably, the positive and trusting relationships that the change leaders have developed with participants has been established among group members through our past demonstration of responsiveness and flexibility towards the concerns of the group. Openness to feedback will be a key element of group expectations established early in the program, and will support the SL nature of this intervention.

Change Process Monitoring and Evaluation

In the following section, I will explain the application of the Plan, Study, Do, Act (PDSA) model, and how it relates to the SL approach that underpins the implementation of this project. Next, I will discuss the various qualitative and quantitative methods that will be used to measure this change, and how they will evaluate different aspects of the learning. In addition, I will consider recent research from Hill et al. (2021) that offers a measurement tool for elements of White fragility. I will also discuss the Implicit Attribution Test (IAT) (Greenwald & Banaji, 1995) and how it fits into this project. This section will conclude with an examination of how the monitoring and evaluation of findings will support the refinement of my implementation plan.

Situational Leadership and the Plan, Do, Study, Act Model

Blanchard (2010) identified four categories for follower development and suggested corresponding SL styles. The group that will be receiving this training are best described as disillusioned learners because they have a low to moderate understanding of the material and a low level of commitment to change. This assertion stems from the findings of the workplace assessment and the previous responses to AO/AR training attempts. According to Blanchard (2010), disillusioned learners are best supported through change when they are coached by leaders who demonstrate highly supportive behaviour and are highly directive about learner behaviour; also referred to as a directing approach in Hersey and Blanchard's (1969) SL leadership model. Because the disillusioned learner requires a high level of change leader engagement, the training program is well-suited for an iterative PDSA development model.

Deming's (1968) Plan, Do, Study, Act model provides a structural framework for experimental learning programs (Reed & Card, 2016). PDSA is particularly useful for supporting smaller, serial, cycles of change rather than broad, sweeping change (Connelly, 2021; Leis & Shojania, 2017). At first glance, my PoP presents as a broad, sweeping issue; however, in order to manage the change effectively, the larger problem of resolving the lack of AO/AR praxis in the shelter, will be broken down into smaller sub-problems. These sub-problems will underpin the outline for the curricular subject matter that will be covered in the program, with 2 sub-problems (topics) being addressed each week.

PDSA aligns well with this project and the SL approach we will rely upon. Proper use of the PDSA model requires leaders to rigorously engage in the process following each cycle of change. For my project, this will involve cycling through each step every week after the training session. To this end, these micro PDSA cycles will serve as a means of monitoring the change as it happens.

As per the "plan" stage of the model, this OIP has included the planning of communication, logistics, and the development of curriculum based on the established emotional and intellectual needs of the group (Christoff, 2018; Langford, 2015; Leis & Shojania, 2017). During the "do" stage, participants will be introduced to the material, assessed, and guided through the learning (Christoff, 2018; Langford, 2015; Leis & Shojania, 2017). The "study" stage will follow each training session, and leaders will collect and analyse the information and observations obtained during the session (Christoff, 2018; Langford, 2015; Leis & Shojania, 2017). The "act" stage will follow, where I will conduct a detailed evaluation of the previous training session and apply that analysis to planning for subsequent trainings (Christoff, 2018; Langford, 2015; Leis & Shojania, 2017).

Figure 5

PDSA Cycle Illustration
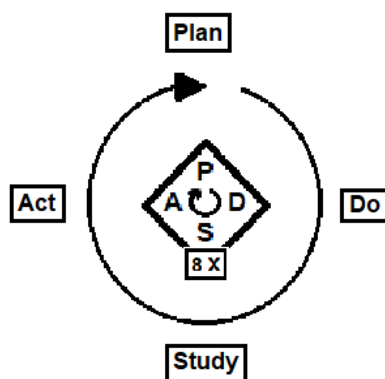
The PDSA model will also be used as a summative evaluation for the entire project. The completed micro (monitoring) PDSA cycles for each session will provide important data to help evaluate the program in its entirety as shown in figure 5. Insofar as the purpose of using a PDSA model for each training session is to monitor the progress and adapt to meet the needs of

participants, working through each step of this process to evaluate the broader program as a whole will support my efforts to improve the intervention for future use with other organizations.

Measuring Change

One of the common criticisms of SL is the difficulty involved in measuring change and developing content with this approach (Thompson & Vecchio, 2009; Vroom & Jago, 2007). Assessing follower competence and commitment has been identified as particularly challenging when using an SL approach (Thompson & Glasø, 2015). Thompson and Glasø (2015), analysed previous research that evaluated the validity of subjective and objective measures of follower competence and commitment (Fernandez & Vecchio, 1997; Norris & Vecchio, 1992; Thompson & Vecchio, 2009; Vecchio, 1987; Vecchio *et al.*, 2006). They found that competence and commitment may not be distinct constructs; rather, they may be attributions based on interpersonal relationships or performance projections, and thus offer limited validity as a measurement tool. To mitigate the risk of attribution bias, Thompson and Glasø (2015) underscore the importance of identifying objective indices for the constructs being assessed.

Given the nature of this project, establishing appropriate, objective change measurements may seem challenging when considering the broader PoP. After all, how can you measure the future integration of AO/AR framework into practice? I would like to underscore that the purpose of this project is not to train the staff in effective integration of an AO/AR framework; rather, the goal of this project is to prime the participants for additional AO/AR learning in the future, reduce their resistance to challenging messages about race, and support them in becoming more open to where they fit into various systems of oppression. In the long-run, I am hopeful that this program will support the group in implementing meaningful AO/AR praxis through continued learning and development; however, the strict focus of this program is to help the group build their capacity to receive and accept AO/AR learning in the future. To this

end, the change measurements will focus on identifying attitudinal and comprehension-based shifts before and after the training program, and following each of the eight sessions.

Armenakis and Harris (2009) promote the use of both quantitative and qualitative measures, as well as a combination of the two when evaluating the impact of a change initiative. For this project, I will be using a combination of qualitative and quantitative measurements. With respect to the broader professional development program, this will include: pre- and post-surveys that interrogate participant comprehension, attitudes, and beliefs about the material that will be covered in the program. These subjects include: implicit bias, racism, privilege, intersectionality, systems of oppression, racist/oppressive language, cultural appropriation, microaggressions, intervention, and activism.

Self-Report Measures

One of the methods that will be employed in the measurement of change is self-reporting. This provides the participants with an opportunity to reflect on their own skills, knowledge, and behaviour, and share those reflections with program facilitators. Although this information will provide leaders with some degree of insight, Krumpal (2012) found that self-reporting is often distorted by social desirability bias, particularly when related to taboo topics like racism. Social desirability bias refers to the tendency of respondents to underreport socially undesirable activities and overreport socially desirable ones in the interest of self-presentation (Krumpal, 2012). Due to concerns about social desirability bias, self-reporting responses will be considered along with several other measures included in the survey tool.

The following is a sample of the kinds of questions participants will be asked in the survey, identifying their responses using a 5-point Likert scale:

- To what extent do you feel that your own personal biases impact the manner in which you interact with BIPOC?

- To what extent do you feel that you personally benefit from privilege?

- To what extent do you feel comfortable discussing race and racism with others in your workplace?

The survey will also ask participants to describe, in their own words, what terms like "intersectionality," "cultural appropriation," and "microaggressions" mean; then, ask them to provide real-life examples of the same. I will evaluate the survey responses using a quantitative and qualitative approach. This analysis will help establish the group's baseline and identify emergent themes so that I can tailor the program to their needs.

Measuring White Fragility

As discussed in previous chapters, I anticipate the most significant barrier to this change will be resistance related to White fragility. Hill et al. (2021) constructed a measurement tool to assess a survey respondent's level of White fragility (DiAngelo, 2011). Their measure incorporates the range of feelings described by DiAngelo (2018) as potentially associated to White fragility including feeling: "singled out, attacked, silenced, shamed, guilty, accused, insulted, judged, angry, scared, and outraged" (p. 119). They also reference the behaviours DiAngelo (2018) associated with White fragility including, "crying, physically leaving, emotionally withdrawing, arguing, denying, focusing on intentions, seeking absolution, and avoiding" (p. 119). The measure asks participants to rate the frequency with which their own emotional and behavioural responses are represented on a Likert scale that includes: never, rarely, sometimes, often, very often.

Appendix D includes excerpts from Hill et al.'s (2021) White fragility items and response categories that have been adapted for this project (p. 1817). Appendix E shows four of the adapted questions that will be included in the pre- and post-survey. These questions intend to describe the psychological and behavioural response that participants have when engaging in conversations about racism and White privilege.

Hill et al. (2021) found their measure offered a good level of reliability and validity, and so I have only minimally adjusted them to suit the needs of this project. The lead author of this research, Dr. Terrence Hill, kindly confirmed via personal correspondence that the measure was "developed for the people," and encouraged its use in this project (T. Hill, personal communication, March 9, 2022). This quantitative measure will offer valuable insight into the degree to which White fragility will act as a barrier to learning, and help illustrate the impact of this program on the feelings and behaviour associated with White fragility over the course of this intervention.

Implicit Attribution Testing

I also considered using Implicit Attribution Testing (IAT) as a pre- and post- testing measure. IAT is a tool used to evaluate and describe the degree of implicit bias among participants (Greenwald et al., 2003), and is generally understood to predict biased attitudes and behaviour (Fazio, 1990; Greenwald & Banaji, 1995; Zajonc, 1980). The IAT is well-known outside academia, having been featured in Malcom Gladwell's, *Blink: the power of thinking without thinking* (2005) and an episode of The Oprah Winfrey Show (Winfrey, 2006). Due to the popularity of IAT and its relevance to my OIP, I am including an explanation of how it will fit in to this project.

After some reflection, I decided against using the IAT as a pre- and post- testing measure for several reasons. Firstly, the participants have already expressed a level of fragility with the subject matter and due to the limited contextual support in the pre-testing phase of the project, I believe the exercise could be poorly received or misinterpreted at that stage. Moreover, the group will not yet have received any training related to the structural elements of bias, and may attribute findings of personal bias through the IAT to moral failings which could exacerbate feelings of shame and deteriorate morale. In addition, De Houwer et al. (2007) found that IAT results can be manipulated by participants and are influenced by the environment and

messaging related to the test. In addition, Oswald et al. (2013) found that the connection between implicit bias as described in IAT results and actual biased behaviour was tenuous, particularly for individuals that have a strong capacity for self-regulation (Olson & Fazio, 2009). Finally, testing for implicit bias before and after the training does not specifically address the objectives of this project, which are not to reduce the level of implicit bias, but rather to build capacity within the participant group to engage with AO/AR learning in a meaningful and accepting way. As such, implicit bias will be a subject that is covered during the training, and so IAT is more appropriate to include in the curriculum. IAT is an excellent tool for self-reflection and discussion, and offers concrete feedback that participants may consider more objective; however, it is not a specific enough measure to evaluate the change I am proposing.

Application of the PDSA Model

In order to engage with the PDSA model of evaluation for each of the training sessions, I will work with the ED to complete a PDSA Worksheet (Appendix F) following each training session. The evaluation worksheet has been adapted for this project based on Christoff's (2018) PDSA worksheet. Rigorous adherence to the PDSA framework is integral to monitoring progress so that I can adjust the subsequent sessions to ensure that the training is responsive and appropriate. Notably, the PDSA model aligns well with the LM pedagogy.

In the "plan" section, the goals of each training session are defined and situated within the broader context of the training, and the plan for each lesson is broken down into 6 (or fewer) tasks that are assigned to a leader. In the "do" section, qualitative observations are recorded following the training. In the "study" section, the leader is asked to compare the results of the training to previous results and identify learning. In the "act" section, the leader is asked to determine which practices should be adopted, adapted, or abandoned for the next training session. Each cycle will produce qualitative data based on the observations of the training facilitator, which will inform the development and implementation of subsequent cycles.

Following the completion of this initiative, the findings of each of the PDSA cycles will be integrated into the broader macro PDSA process for the project. These measures will be analyzed and relied upon to further develop the comprehensive training program for future use. It is through these monitoring cycles that the iterative process of LM will help build out the curriculum in a manner that meets the learning needs of the participants.

Communicating the Need for Change and the Change Process

In this section, I will discuss the plan for communicating the need for change and change process to stakeholders within the organization. Armenakis and Harris' (2001) framework for communicating change aligns well with the type of change described in this OIP, and its detailed application has been presented in chapter 1 of my OIP. In this section, I will expand on their work and discuss how their emphasis on active participation aligns with Lavis et al.'s (2003) work on Knowledge Mobilization (KM). I will also present a completed KM Plan that encapsulates this project.

Next, I will discuss the concept of persuasive communication, and identify how its use can support my change communication. The expectancy model for change will be presented, with a discussion that examines the way previous failed attempts at this change may be attributed to expectancy bias, and how such barriers will be overcome through this project. I will conclude by discussing the next steps and future considerations for this OIP, and reflect upon the role of White leaders in social justice driven change.

With consideration for the nature of this project, communication can be understood as more than just discrete and intentional information sharing. Because the project relies so heavily on the feedback provided by participants at every stage of this initiative, the concept of communication extends beyond emails and conversation, and encompasses all form of response and interpretation throughout. It is the nature of these responses (and leaders' interpretation of them) that will help construct the facilitated learning program.

Communicating the Need for Change

With consideration given to the issue of "White fragility" (DiAngelo, 2011, 2018) that has already been observed in the group following previous attempts at anti-racist training, our change communication is critically important. In order to mitigate the risk of alienating Home Base staff, I will base the communication strategy around the framework provided by Armenakis and Harris (2001). By appealing to the five message domains of: discrepancy, efficacy, appropriateness, principal support, and personal valence, I anticipate we will be able to move the shelter staff onto the change path. To this end, our communication to staff will incorporate the following:

Discrepancy

Discrepancy refers to the extent to which an audience understands a gap between the current and desired state (Armenakis & Harris, 2001). In order to illustrate this incongruity, I will connect the initiative to the feedback that shelter staff provided last year during the workplace assessment interviews. Communication throughout the project will connect their complaints relating to the lack of connection with clients with their confusion about the challenges they face when supporting clients that have different lived experiences to their own. This messaging will begin during the awakening phases of the CPM, at the initial meeting introducing the initiative to the employee group, and be delivered by the ED and I. I will take care not to attribute any blame to them, and rather frame this as an opportunity to build skills and competencies to re-engage with their careers. Alavi and Henderson (1981), referred to this stage of change as "felt-need," understood as the moment an individual realizes something needs to change. I believe that previous attempts at making this change have failed because the shelter staff did not experience this felt-need and were not given the opportunity to develop the motivation to make the shift.

Efficacy

Efficacy refers to the feeling of confidence among group members that the change will be successful (Armenakis and Harris, 2001). This kind of communication will frame the program as a way to build allyship capacity and confidence with the clients they support. Communicating efficacy will be woven throughout the training program through participant evaluation and feedback. Efficacy will also be demonstrated by the ED and I sharing personal experiences integrating an AO/AR lens into our own worldview. Participants will receive the message that they are capable of improving their understanding of their client's lived experience, which will support them in becoming more effective in their roles. Communicating efficacy to the group aligns with the mobilization phase of CPM (Deszca et al., 2020) in that it will stimulate their confidence in their capacity to make this change in order to offer their clients effective and appropriate, harm-reduced support.

Appropriateness

Appropriateness refers to the participants' agreement with the proposed solution to the problem (Armenakis & Harris, 2001). Insofar as I anticipate some resistance from the group, I believe much of that resistance can be overcome if the group members come to accept the appropriateness of the solution. To this end, the ED and I will ensure the employees have an opportunity to discuss their concerns or questions during every stage of the project. This practice will be reflected in the micro-PDSA cycles that are completed following every training session. Additionally, while introducing participants to the program, I will supply them with some of the research used in its development. Facilitating the engagement of group members at every stage of this project will build on an active participation pedagogy. This phase of communication aligns with the acceleration phase of CPM, particularly as it relates to the acceleration of engagement in the change among employees.

Armenakis and Harris (2001) suggest that active participation pedagogy is particularly effective in making change. This assertion is further supported by McCarthy-Latimer (2018), who found that engaging in participative deliberation in relation to socio-political opinion is a highly effective learning tool. To this end, the principles of active participation pedagogy will guide my approach to the intervention, as described in previous chapters.

Principal Support

Principal support refers to the extent to which the project has the resources and organizational commitment to become institutionalized (Armenakis & Harris, 2001). The ED has a strong relationship with the group and is keen to support this initiative. According to Welton et al. (2018), when respected senior leaders engage in anti-racist change initiatives alongside their employees, the group is more likely to accept the change. In particular, because the group understands their culture through a constructivist lens, by having the ED learn alongside the shelter staff, she will also participate in co-creating their new reality. To this end, the element of principal support aligns with the institutionalization of this change outlined in the CPM (Deszca et al., 2020) particularly as it relates to the organization's capacity for sustained change. Establishing principal support for this change will involve the ED communicating the short-, medium-, and long-term resources available to support the change among employees.

Personal Valence

Personal valence refers to the extent to which participants believe they will benefit from the change (Armenakis & Harris, 2001). As Sleeter (2017) argued, no amount of CRT learning will lead to practical change unless goal convergence can be established. The GVV curriculum (Gentile, 2010) offers a structured framework for bringing individual values into alignment with the change being proposed. To this end, the GVV curriculum will support the CPM (Deszca et al., 2020) and be woven into the training program to support the group in understanding how they will benefit from the change. I will ensure that the communication plan emphasizes the

many benefits that AO/AR practice will have on their professional lives, by connecting with their spiritually-framed desire to maintain their identity as good people who help women and children get out of difficult and dangerous situations. I will also take care to connect the initiative with the feedback that shelter staff provided during the workplace assessment, further validating the concerns they have raised.

Active Participation in Communication

Armenakis and Harris (2001) argue that poorly planned change communication is often the fault line in failed change initiatives. They emphasize the power of change communication in shaping sentiment and determining the reaction to change, and promote the use of an active participation strategy in change communication (Armenakis & Harris, 2001). Armenakis and Harris' communication research has had a consistent influence on my communication plan, and their emphasis on active participation in change communication aligns well with this project.

The three kinds of active participation are understood as: enactive mastery, vicarious learning, and participation in decision making (Armenakis et al., 1999, Fishbein & Azjen, 1975). These elements of active participation provide the most effective means of transmitting information, and leveraging participants' drive for self-discovery (Armenakis et al., 1999, Fishbein & Azjen, 1975). Enactive mastery refers to the gradual development of knowledge, skills, capacity, and efficacy through successive practice and engagement. The tenets of enactive mastery share considerable overlap with the tenets of LM, which is a core andragogical approach I will employ in this project. Vicarious learning refers to the process of observing and learning from the practice of others (Armenakis & Harris, 2001; Myers, 2018). Vicarious learning is another key andragogical component to my change plan, manifesting in facilitated discourse and discussion posts that are integrated throughout the curriculum. Finally, participation in decision making has already begun through the feedback that shelter staff provided during the workplace assessment and its connection to the development of this initiative. The shelter staff

and ED will continue to participate in decision-making via the feedback obtained in the PDSA practice described earlier in this chapter. Including the participants and organizational stakeholders in the decision-making process will establish a connection between the trust and confidence that leaders have in the wisdom of their employees and the goal of producing a genuine sense of partnership in this initiative (Armenakis & Harris, 2001).

Expanding on the importance of participative decision making, Lavis et al. (2003) present a KM model for action research where academics and partner organizations work together to co-create knowledge with the goal of driving real, positive impact within communities. KM refers to the meaningful use of expertise and evidence to align research and practice, in pursuit of the greater good (Ontario Centre of Excellence for Child and Youth Mental Health, 2019). Inspired by this model, Skipper and Pepler (2021) propose an even more interdependent approach to KM wherein researchers work with community organizations at every stage of the project planning and development process. As outlined in previous sections, this project represents a highly interdependent approach to KM, emphasizing the relational self as interconnected with others, existing within a whole system, and driving practical change that contributes to a positive shift in belief (Bradbury, 2015). These changes reflect Bradbury's (2015) assertion that action research should focus on researching with a given population, rather than on them. Given the situational approach to this project and the important role of leader responsiveness to participants, the implementation of this project has been, and will continue to be, entirely co-created. By deploying the GVV curriculum during the awakening, mobilization, and acceleration phase of the CPM, participants will have an opportunity to engage in reflexive contemplation as they learn. Participants' capacity for reflexive contemplation is foundational to the objectives of this program, and subsequent institutionalization of the learning.

Knowledge Mobilization Plan

The following section translates my OIP into a KM plan (Appendix G) that was published by the Ontario Center for Excellence in Child and Youth Mental Health (2019). This tool offers leaders a framework for engaging stakeholders in the co-creation of knowledge in social services, to support and empower people to deepen their understanding of, and relationship with, the information. Although much of the content presented in this exercise has been discussed in previous sections, the tool effectively summarizes the project through the lens of KM practice.

The knowledge that this project aims to mobilize, focuses on overcoming the resistance from shelter staff to AO/AR praxis, namely, critical race learning, including the topics of: positionality, White privilege, structural racism, White supremacy, microaggressions, and implicit bias. This knowledge is meaningful because it is foundational in shifting away from a colourblind paradigm towards a more critical and wholistic understanding of issues related to race. To this end, I hope to drive a change in the way shelter staff interpret and respond to issues related to race and oppression by shifting their beliefs.

My partners in this project are, in a general sense, the shelter organization; but more specifically, the ED, and Home Base staff. The ED is highly respected among shelter staff and will bring additional credibility to the project. She has also worked in (or with) the shelter for decades, and offers a strong understanding of the culture. Home Base staff have, and will continue to, provide feedback (implicitly and explicitly) that will support the timing and delivery of content in the program. They will also provide the data required to measure the change by participating in pre- and post-training surveys. Both the ED and shelter staff will be engaged in the co-creation process throughout the project. The ED is a project champion, and we will work together to identify others while the process is underway.

The group we are targeting for change are shelter staff. Their feedback via the workplace assessment has informed the development of the key messaging for this initiative. We will disseminate information to them about this project by way of an in-person presentation and through email communication. Ongoing communication will be incorporated in this project through real-time feedback during training and shared posts on the discussion board.

KM will take place over the course of the program through: discussion posts, case studies, texts, self-reflection exercises, role plays, lecture, podcasts, videos, webinars, and interactive workshops. These strategies were chosen based on the identified needs of the participants and scholarship in the area of change making related to systems of belief.

In terms of resources, this project will require a modest budget to cover the costs of text material and the hourly wages of participants. It is also important that participants have access to internet and a device that can support this training, since pandemic restrictions are likely to force the program online. I hope to implement this plan in the fall of 2022, since staff holiday schedules will be less likely to interfere with training sessions. I will also have more time available in the fall to give the project the attention it deserves.

From a quantitative perspective, I will know the program has achieved its goals if the post-training survey results show an improvement compared to the pre-training survey. Qualitative indications of success include: increased interest in AO/AR engagement among staff, increased comfort in relating to the subject of race and oppression, improved connection between staff and clients, fewer complaints from clients and/or disciplinary interventions related to racist or oppressive conduct by staff, observations from staff and managers, and general improvements in job satisfaction. I will collect the quantitative measurement data immediately following the training program. Qualitative changes will be determined through informal interviews with participants and their managers in addition to the ED three months after the intervention. The results of this intervention will be described in a detailed report I will create for

the ED, with an accompanying executive summary intended for the board of directors. Participants will receive a briefing note communicating the results of the project, with information about additional developmental opportunities.

Research supports the use of tangible rewards to drive employee motivation and encourage desired behaviour in certain situations (Cameron et al., 2001; Kremer et al., 2009). Cameron et al. (2001) found that tangible rewards for low interest tasks enhanced intrinsic motivation, and verbal rewards for high-interest tasks enhanced intrinsic motivation. Drawing from gamification research (Hurst, 2015), and with the tendencies of low-interest learners in mind, all participants that successfully complete the training program by establishing mastery of the core concepts, will receive a badge or pin denoting their achievement. This tangible reward can be worn at work, both to help incorporate a visible reminder of the program in the work setting, and to build enthusiasm about AO/AR learning within Home Base's culture. Moreover, it will strengthen intrinsic motivation to integrate the training into practice for staff who are less interested in engaging in this training. For the high-interest participants, the training incorporates consistent opportunities for positive feedback, both from facilitators and other participants. This element of persuasive communication supports the co-creation of a reality in which challenging discussions are understood as productive and positive, rather than abusive. These two methods of rewarding participants support a generative learning space and provide and opportunity to recognize wins regardless of participant interest level.

Persuasive Communication

Persuasive communication is a field of study that considers how to shape, change, or reinforce the manner in which others receive and respond to messages (Miller, 1980; Stiff & Mongeau, 2016). Persuasive communication can be understood as intentionally shaping the message recipient's response to objects, people, and issues that require the formation of new

attitudes (Miller, 1980; Stiff & Mongeau, 2016). Source credibility is a critical component of persuasive communication (De Meulenaer et al., 2018; Stiff & Mongeau, 2016).

Scholars generally agree that source credibility is a multidimensional concept, however, there is some disagreement regarding what those dimensions are (Kumakale et al., 2010; Pornpitakpan, 2004; Stiff & Mongeau, 2016). Source credibility can be understood as rooted in the receiver's perception of the source, with respect to their expertise and trustworthiness. Kumkale et al. (2010), found that the impact of source credibility on persuasion was limited when the message recipients already had pre-formed attitudes on the matter. In such cases, they found that message receivers relied on information and assessments they had stored in their own memory, making the distinction between shaping, changing and reinforcing attitudes particularly important. As previously discussed, the participants in this training all have preformed attitudes about the subject matter, making the focus of this program changing the participants preformed attitudes.

Gist (1987) found that messaging that is communicated by more than one source is considered more believable, particularly when one of the sources is external to the organization. To this end, the communication strategy for introducing this initiative will include email and in-person (or synchronous online, based on pandemic guidelines) messaging from the ED and I, in addition to communication from the direct supervisor of the shelter. Notably, the ED and I will be meeting with union leadership in advance of the rollout, as part of the awakening phase of the CPM, to engage them in elements of the planning and allow for participation in decision-making, with the hope of identifying potential change champions.

The Expectancy Model of Opinion Change

The expectancy model of opinion change (Stiff & Mongeau, 2016) illustrates the manner in which various factors flow together to drive opinion change in Figure 6 (p. 151).

Figure 6

The Expectancy Model of Opinion Change (Stiff & Mongeau, 2016)
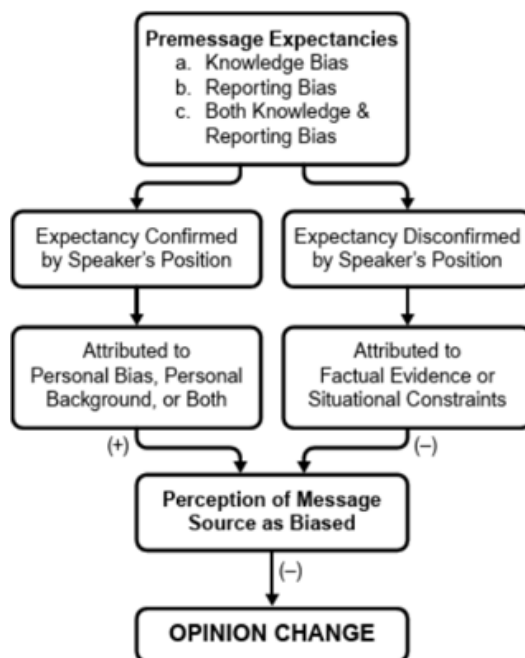
Stiff and Mongeau underscore the important role of premessage expectancies in the opinion

changing process, particularly when the change involves driving an entrenched attitudinal shift.

Premessage expectancies include: knowledge bias, a message receiver's belief that the

source's background or position prevents them from communicating an objectively credible

message; and reporting bias, a message receiver's belief that the source is unwilling to provide

accurate information about a given topic.

In cases where such biases are confirmed through the source's position, opinions that

conflict with those of the message recipient are attributed to personal bias or background. When

the source engages with the message recipient in a manner that disconfirms these biases,

conflicting opinions are more likely to be understood as factual evidence or representative of

real situational constraints. It is only through the latter course that opinion change will occur.

With respect to the dynamics at Home Base, I first considered the application of this model in relation to the previous failed attempts at change. The prior attempts at AO/AR training were initiated by a former manager that had a very contentious relationship with the shelter staff. Based on the findings of the workplace assessment, it was clear that shelter staff found the manager's general behaviour towards them disrespectful and spiteful. Additionally, the group did not understand the need for AO/AR training because of their shared "colourblind" approach to their work. As a result, several staff members framed the training as an attempt by the manager to punish them unfairly. In this regard, it appears their premessage expectancies related to the change were impacted by their perception of their former manager's credibility to the extent that they attributed her perceived distain for them as a driving force behind the initiative.

For this project, I will take care to ensure the group understands change leaders as viewing them with unconditional positive regard. The messaging will underscore the implicit and explicit feedback they provided during the workplace assessment, and be presented in the context of the complex situational environment within which Home Base operates. In addition, since the ED and I are both White, it is less likely that the participants will understand our motivations for this change initiative as self-interested. I hope that the group is able to perceive our message as unbiased so that this program can influence the group enough that they understand the need for change as an objectively valuable shift that will benefit both their clients and themselves. Through the use of PDSA cycling, I will have an opportunity to assess the receptivity and level of learning for the participants, and adjust future sessions as needed.

Next Steps, Future Considerations of the Organizational Improvement Plan

Insofar as the goal of this OIP is to build capacity within program participants so that they can remain open and curious about uncomfortable issues like racism and oppression; the fundamental impetus for doing so is the need to overcome their current resistance to the subject

matter. This initiative aims to dismantle the barriers that would otherwise interfere with future AO/AR learning. By continuing to offer staff learning opportunities that build upon the knowledge they will have gained in this training, the organization can guide shelter staff towards realizing a practice that aligns with organizational values and expectations.

This project was born out of my own frustrating experiences as a leader who benefits from White privilege, but also fundamentally believes the paid work of anti-racist education should be offered to Black and Indigenous educators who can bring their own lived experience to the conversation. After observing the hostility that many of these Black and Indigenous educators face from their White audiences, I became curious to learn more about what people in leadership positions could do to prevent undue harm to Black and Indigenous educators and colleagues during these training sessions, and ensure that White participants had the capacity to overcome their own resistance to the material. However, as someone who already benefits from White privilege, I do not feel it is appropriate to earn money from work that exists because of a system that already benefits me.

The Ongoing Practice of Fostering Allyship

Ijeoma Oluo (2018) said "[w]hen we identify where our privilege intersects with someone else's oppression, we'll find our opportunities to make real change" (p. 65). Allyship can best be understood as a consistent pattern of behaviour rather than a concrete identity, as is commonly understood (Terry, 2021). Allies are active supporters of social justice through their work promoting the rights of marginalized people, and eliminating social inequality despite the benefits it affords them (Terry, 2021). There is certainly a role for White allies in the fight for social justice, and insofar as the current racist systems were put in place by individuals with privilege, they can only be dismantled with the support of individuals from that dominant group (Williams & Gran-Ruaz, 2021). Ostrove and Brown (2018) argue that allyship is the practice of leveraging power and privilege to dismantle inequitable systems in communities where allies are

invested and accountable. The spirit of this OIP aligns with this understanding of allyship, and it is through this project that I hope to catalyze the group's cultural understanding of their investment and accountability to racialized people and ignite their drive to dismantle the systems that oppress them.

As a next step, I am working with the organization to engage in developing relationships with experienced Black and Indigenous educators that can continue with subsequent phases of this project through paid work. There is no shortage of Black and Indigenous AO/AR educators, and research supports that they are better equipped for situational engagement of participants because of the experiential lens that is not available to White facilitators (Browne et al., 2021). Moreover, organizations signal an important message to participants by hiring racialized trainers. Olou (2018) argues that racialized people are more adept than White people at identifying racist dynamics, noting "it is about race if a person of colour thinks it is about race" (p. 15). By upholding racialized AO/AR educators as experts, leaders can model their commitment to respecting and valuing their lived experience while also financially supporting their work.

Although I am considering facilitating this capacity building training with other organizations, the format, approach, and goals of the training may differ slightly in the future based on the circumstances. For example, at this organization, 100% of the shelter staff benefit from White privilege, and as a result, the psychological needs of Home Base staff can be prioritized in a way that would be inappropriate if people from racially marginalized backgrounds were present, since doing so is likely to cause psychological harm and damage professional relationships (Liebow & Glazer, 2019). If this project was to be repeated at a more racially diverse organization, the training could be presented as optional for racialized employees, provided that their absence did not result in financial disadvantage for them. Alternatively, racialized employees could be offered a similarly compensated but unrelated training program

that supports their career advancement. Such an arrangement provides an opportunity for the organization to demonstrate a comprehensive investment in promoting equity among employees. Insofar as my OIP offers a potential solution to the problem of overcoming resistance to AO/AR learning, it is just one step on the path to greater change.

Chapter 3 Conclusion

In this chapter, I presented the planning framework used to develop this training program which was informed by Kolb and Frohman's (1970) organizational development approach to consulting. I also discussed Joyce and Showers' (1982; 1996; 2002) research and how their emphasis on driving effective complex behavioural change applies to this project. I then examined how Deming's PDSA model provides a means of monitoring change during the training, and evaluating the change following its completion.

Strategic communication is foundational to the success of this project, and the communication plan developed by Armenakis and Harris (2001) offers an effective framework for engaging with organizational stakeholders. Informed by the practices of KM and persuasive communication, I expect that considered and strategic communication will overcome the participants' resistance to change that poses the most significant threat to this project. As we approach 8 years since the AO/AR practice framework was formally instituted in the organization, and reflect on the many failed attempts to make this change over those years, I am hopeful that this well-researched, practical plan will catalyze the desired shift and fortify the participants as allies to marginalized people.

OIP Conclusion

The purpose of this OIP was to address the barriers to full integration of AO/AR praxis by shelter staff. In order to do so, the internal and external context of Home Base was considered, previous attempts at similar change were analyzed, and the staff group's resistance to AO/AR learning was identified as a significant barrier to the institutionalization of AO/AR practices within the shelter. In considering solutions to the PoP, a consistent emergent theme was the important role of trust and vulnerability in the leadership approach, and relationship between, leaders and the employee group. To this end, an integrated TL, transformative leadership, and SL, approach was used during the consideration and development of solutions to the PoP. Ultimately, I determined that a co-facilitated, comprehensive, 8-week, guided learning program was the most appropriate solution to address this problem.

Although a thorough, evidence-based analysis was foundational to the development of this project, because the solution addresses a dynamic, and largely psychological barrier to change, this plan offers a mere framework for the training program. One could argue that agility, responsiveness, and relational interaction plays a more important role to the success of the project than the training curriculum. As such, the ongoing monitoring and evaluation of this strategy through the practice of rigorous PDSA cycling will facilitate the collection of feedback to tailor the program to the needs of participants.

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Appendix A – Change Readiness Measure with Responses (Deszca et al., 2020)

Readiness Dimensions	Readiness Score	
Previous Change Experiences		
1. Has the organization had generally positive experiences with change?	If yes, Score +1	✗
2. Has the organization had recent failure experiences with change?	Score –1	✓
3. What is the mood of the organization: upbeat and positive?	Score +1	✗
4. What is the mood of the organization: negative and cynical?	Score –2	✗
5. Does the organization appear to be resting on its laurels?	Score –1	✗
Executive Support		
6. Are senior managers directly involved in sponsoring the change?	Score +2	✓
7. Is there a clear picture of the future?	Score +1	✓
8. Is executive success dependent on the change occurring?	Score +1	✓
9. Has management ever demonstrated a lack of support?	Score –1	✗

Readiness Dimensions	Readiness Score
Credible Leadership and Change Champions	
10. Are senior leaders in the organization trusted?	Score +1
11. Are senior leaders able to credibly show others how to achieve their collective goals?	Score +1
12. Is the organization able to attract and retain capable and respected change champions?	Score +2
13. Are middle managers able to effectively link senior managers with the rest of the organization?	Score +1
14. Are senior leaders likely to view the proposed change as generally appropriate for the organization?	Score +2
15. Will the proposed change be viewed as needed by the senior leaders?	Score +2

Openness to Change

16. Does the organization have scanning mechanisms to monitor the environment?	Score +1	✓
17. Is there a culture of scanning and paying attention to those scans?	Score +1	✗
18. Does the organization have the ability to focus on root causes and recognize interdependencies both inside and outside the organization's boundaries?	Score +1	✓
19. Does "turf" protection exist in the organization?	Score −1	✓
20. Are the senior managers hidebound or locked into the use of past strategies, approaches, and solutions?	Score −1	✗
21. Are employees able to constructively voice their concerns or support?	Score +1	✓
22. Is conflict dealt with openly, with a focus on resolution?	Score +1	✓
23. Is conflict suppressed and smoothed over?	Score −1	✓
24. Does the organization have a culture that is innovative and encourages innovative activities?	Score +1	✗
25. Does the organization have communications channels that work effectively in all directions?	Score +1	✓
26. Will the proposed change be viewed as generally appropriate for the organization by those not in senior leadership roles?	Score +2	✓
27. Will the proposed change be viewed as needed by those not in senior leadership roles?	Score +2	✗

Readiness Dimensions	Readiness Score	
28. Do those who will be affected believe they have the energy needed to undertake the change?	Score +2	✗
29. Do those who will be affected believe there will be access to sufficient resources to support the change?	Score +2	✓
Rewards for Change		
30. Does the reward system value innovation and change?	Score +1	✗
31. Does the reward system focus exclusively on short-term results?	Score –1	✗
32. Are people censured for attempting change and failing?	Score –1	✗
Measures for Change and Accountability		
33. Are there good measures available for assessing the need for change and tracking progress?	Score +1	✓
34. Does the organization attend to the data that it collects?	Score +1	✓
35. Does the organization measure and evaluate customer satisfaction?	Score +1	✗
36. Is the organization able to carefully steward resources and successfully meet predetermined deadlines?	Score +1	✓
The scores can range from –10 to +35.		
The purpose of this tool is to raise awareness concerning readiness for change and is not meant to be used as a research tool.		
If the organization scores below 10, it is not likely ready for change and change will be very difficult.		
The higher the score, the more ready the organization is for change. Use the scores to focus your attention on areas that need strengthening in order to improve readiness.		
Change is never "simple," but when organizational factors supportive of change are in place, the task of the change agent is manageable.		

Appendix B – Readiness for Change Measure with Responses (Kezar, 2018)

Appendix 3: Readiness for Change

Readiness Survey

Readiness Factor	Strongly Agree	Agree	Not Sure	Disagree	Strongly Disagree
Planning					
. The team has a clearly articulated, motivating, and shared vision for the project.		▬			
. Our vision is linked to key systemic and/or institutional priorities.	▬				
. We have scanned the campus for other related projects, programs, and initiatives that already exist to which the new project might connect to or leverage.	▬				
. We have created a project plan with identified actions, milestones, and an achievable timeline. The plan might involve a pilot project that will allow for initial testing and experimentation before scale-up.	▬				
. We have identified possible pitfalls and roadblocks.	▬				
. We have a plan for helping stakeholders (e.g. faculty, students) understand what is happening, the purpose and desired outcomes e.g. forums, town–gown meetings, communications plan, professional development).		▬			
. We have an assessment plan and the capacity (including needed expertise in institutional research offices) to measure and analyze results.		▬			

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continued

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Readiness Factor	Strongly Agree	Agree	Not Sure	Disagree	Strongly Disagree
. Our assessment plan is linked to project outcomes and leverages existing data sources.	■				
. We have identified appropriate resources and facilities required to carry out the project.	■				
. We have created a project budget.	■				
. We have identified sources of support, both internal and external e.g. grants, gifts, in-kind donations	■				
. We have inventoried key policies (e.g. promotion) that may impact implementation of the change and have plans for adjusting them.		■			
People/Leadership					
. We have a team comprised of the appropriate administrators, faculty, and staff with needed expertise. There is multilevel and shared leadership.	■				
. Leaders at different levels understand the role they need to play to move the change forward. (If not, we have a plan for educating leaders about their roles.)	■				
. We have senior administrative support for resources, rewards, and other key motivational and policy issues.	■				
. The project has several leaders/champions. It is not reliant on one person.	■				

Readiness Factor	Strongly Agree	Agree	Not Sure	Disagree	Strongly Disagree
. We have identified and hired a project manager who has the time and expertise required.	■				
. People involved in the project have the time, incentives, motivation, and expertise to successfully carry out project objectives.		■			
. If additional professional development or training is required, we have identified what is needed and have a plan for providing it to project faculty, staff, and students.		■			
. We have identified external experts required to help campus leaders, faculty, and staff build plans, develop needed expertise, and/or evaluate results.	■				
. We have identified and informed key on- and off-campus stakeholders. (Off-campus stakeholders may include K-12 educational, community, and/or industry partners.)				■	

Politics

	Strongly Agree	Agree	Not Sure	Disagree	Strongly Disagree
. The project has the support of the president, provost, deans, and other key administrators.	■				
. We have identified the political issues we might encounter, including relevant policies or procedures, committee/departmental approval processes, incentives and rewards, and allocation of resources and space.		■			
. We have buy-in from key on-campus stakeholders.	■				

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continued

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Readiness Factor	Strongly Agree	Agree	Not Sure	Disagree	Strongly Disagree
. We have strategies for addressing the identified political issues.		▮			
. We have leveraged external messages to create urgency for the change.				▮	
Culture					
. We have examined the underlying values of the proposed change and identified the degree of difference from current values to understand dissonance.	▮				
. We have conducted a survey (or held extensive conversations) to understand resistance, understanding, and values related to the proposed change.	▮				
. We have developed documents that clearly articulate the proposed change to inform stakeholders and ensured they have been reviewed and read.				▮	
. We have attempted to connect the proposed change to existing values on campus.		▮			
. We have examined ways to create new symbols, stories, or rituals to embed the change.		▮			
. We have created a narrative or story to capture and articulate the change to stakeholders.		▮			

Readiness Factor	Strongly Agree	Agree	Not Sure	Disagree	Strongly Disagree
. We have a plan for how we will communicate and celebrate project results. The plan should include both on- and off-campus sources as well as dissemination opportunities (e.g. published papers, conference presentations).		▮			
Sensemaking and Learning					
. We have an understanding of how stakeholders view the proposed change.	▮				
. We have a plan for ways we can help bridge the gap between current knowledge and needed knowledge.	▮				
. We have a plan to get appropriate data to different groups that need to engage in learning.	▮				
. We have developed our data capacity and knowledge management systems to support the change.		▮			
. We have training and support around data use and interpretation so data can be used to inform decisions needed around the change.					

Appendix C: Working Draft of Instructional Outline

Table 5

OIP Instructional Outline

Lesson	Component	Resources	Outcomes	Elements	Research supported elements	Practice
Pre-Training	Introduction	Zoom Meeting	Participants will be introduced to the PD program	* Expectation setting * Logistics * Explanation of why, who benefits * Overview of confidentiality and safe learning expectations	*Peer support *Coaching	
	Book Club	Resource Text	Distribution of "So you want to talk about race" by Ijeoma Oluo	* Author bio * Description of content	* Time to digest	
	Pre-Training assessment	Survey Monkey	Prior to starting on the text, participants will be asked to complete a questionnaire regarding their personal understanding and opinions to help facilitators assess AR/AO understanding, and develop an appropriate starting point for training	* Including: questions of personal identity, erasure, systemic vs. individual racism, opinions re: impact of race on social experiences	*Understanding starting point to meet group where they are	*Evaluation of Program
	Homework	Resource Text	Participants will be asked to read Ch. 1 (Is it really about race?) and 2 (What is racism?) prior to next meeting (in two weeks).		* Self directed study * Time to digest	

1	Book Club	PPT, Discussion, Role play	Ch 1 & 2 - Participants will understand role of race in society, definition of racism.	* Power hierarchy exercise * Bringing race to every situation, including Whiteness * Comparison of racism to DV * Reverse racism	* 90% review of readings * LM * Simulation *DI	Toolkit Practice: Reverse racism conversation - how to respond to this "what was said to you wasn't ok and should be addressed, but we are talking about two different things, X hurt, may have been humiliating, but after those feelings fade, what measureable impact will it have on your life? safety? ability to walk the streets? get a job? how often has that been used to deny you services? what measurable impacts has that had on White people in general? - lightbulb may not go off, but seed is planted, understanding of you as an AR/AO practitioner will shift.
	Implicit Bias	PPT	Participants will understand the ways bias, whether explicit or implicit, puts a lens on the way that we interpret the world	* Harvard research study * Share video (Oprah) * Show group how to complete test (share link)	*10% introduction of new material	
	Homework	Resource Text	Participants will be asked to read Ch. 3 (What if I talk about race wrong?) and 4 (Why am I always being told to "check my privilege"?) prior to next meeting (in one week)		* Self directed study * Time to digest	

	Homework	Online bias test	Participants will be asked to save their results, no obligation to share them, but review for reference. ED and I will share our's as discussion material, group will be encouraged to do the same.	* Discussion post: did your results surprise you?	* Experiential learning	
2	Book Club	PPT Presentation and Discussion	Ch 3 & 4 - participants will consider why/how they do/don't talk about race, White fragility, what is privilege and how does it apply to them.	* Definition of racism * Definition of privilege * Discussion of privilege broadly and White privilege specifically	* 90% review of readings	
	Silence, fragility, privilege	Discussion	Debrief results: what does this mean? What can we do about it?	* Consider role of life experience, social group, personal experiences, etc	* 90% review of implicit bias test	
	Homework	Self-reflection	For the next class, consider an example of how your own implicit bias may have impacted a marginalized person	* Personal narrative sharing	*Direct Instruction *Experiential Learning	
	Homework	Resource Text	Participants will be asked to read Ch. 5 (What is intersectionality and why do I need it?) and 6 (Is police brutality really about race?" prior to next meeting (in one week).		* Self directed study * Time to digest	
3	Book Club		Ch 5 & 6 - participants will consider intersectionality and police brutality as it applies to their work			
	Justice system, Intersectionality	Lecture	Intersectionality and the justice system	* Discussion re: position of shelter relative to carcereal justice system		

	Homework		Discussion post: explain the concept of Intersectionality, White privilege, or police violence to audience of choosing (child, peer, partner, stranger)			
	Homework	Resource Text	Participants will be asked to read Ch. 7 (How can I talk about affirmative action?) and 8 (What is the school to prison pipeline?) prior to the next meeting (in one week).		* Self directed study * Time to digest	
4						
	Homework					
	Homework	Resource Text	Participants will be asked to read Ch. 9 (Why can't I say the "N" word?) and 10 (What is cultural appropriation?) prior to the next meeting (in one week).		* Self directed study * Time to digest	
5						
	Homework					
	Homework	Resource Text	Participants will be asked to read Ch. 11 (Why can't I touch your hair?) and 12 (What are microaggressions?) prior to the next meeting (in one week).		* Self directed study * Time to digest	
6						
	Homework					
	Homework	Resource Text	Participants will be asked to read Ch. 13 (Why are our students so angry?) and 14 (What is the model minority myth?) prior to the meeting (in one week).		* Self directed study * Time to digest	
7						

	Homework				
	Homework	Resource Text	Participants will be asked to reach Ch. 15 (But what if I hate Al Sharpton?), 16 (I just got called racist, what do I do now?), and 17 (Talking is great, but what else can I do?) Prior to the meeting (in one week).		* Self directed study * Time to digest
8					
	Homework				
Post-Training					

Appendix D: White Fragility Measure Excerpt (Hill et al., 2021)

Table D1

White Fragility Survey, Hill et al., (2021, p. 1817)

Original 22 White Fragility Items and Response Categories

Stem 1: When People Include You in Discussions of Racism or Race-Based Discrimination in the United States, How Does the Discussion Itself Usually Make You Feel? How Often Do These Discussions Make You Feel…

	Never	Rarely	Sometimes	Often	Very Often
1. Confused	1	2	3	4	5
2. Attacked	1	2	3	4	5
3. Guilty	1	2	3	4	5
4. Angry	1	2	3	4	5
5. Unsafe	1	2	3	4	5
6. Sad	1	2	3	4	5
7. Drained/exhausted	1	2	3	4	5

Stem 2: When People Include You in Discussions of Racism or Race-Based Discrimination in the United States, How Do You Usually React to the Discussion Itself? How Often Do These Discussions Make You Want to…

	Never	Rarely	Sometimes	Often	Very Often
8. Leave the room	1	2	3	4	5
9. Listen without responding	1	2	3	4	5
10. Respond without arguing	1	2	3	4	5
11. Argue your position	1	2	3	4	5

Stem 3: When People Include You in Discussions of "White Privilege" in the United States, How Does the Discussion Itself Usually Make You Feel? How Often Do These Discussions Make You Feel…

	Never	Rarely	Sometimes	Often	Very Often
12. Confused	1	2	3	4	5
13. Attacked	1	2	3	4	5
14. Guilty	1	2	3	4	5
15. Angry	1	2	3	4	5
16. Unsafe	1	2	3	4	5
17. Sad	1	2	3	4	5
18. Drained/exhausted	1	2	3	4	5

Stem 4: When People Include You in Discussions of "White Privilege" in the United States, How Do You Usually React to the Discussion Itself? How Often Do These Discussions Make You Want to…

	Never	Rarely	Sometimes	Often	Very Often
19. Leave the room	1	2	3	4	5
20. Listen without responding	1	2	3	4	5
21. Respond without arguing	1	2	3	4	5
22. Argue your position	1	2	3	4	5

Appendix E: White Fragility Questions Adapted for OIP

Table D2

White Fragility Measures for Pre- and Post- Survey Adapted from Hill et al., (2021)

Consider how you feel when you are involved in discussions of racism or race-based discrimination in Canada. How often do these discussions make you feel…						
		Never	Rarely	Sometimes	Often	Very Often
1	Confused	1	2	3	4	5
2	Attacked	1	2	3	4	5
3	Guilty	1	2	3	4	5
4	Angry	1	2	3	4	5
5	Unsafe	1	2	3	4	5
6	Sad	1	2	3	4	5
7	Drained/Exhausted	1	2	3	4	5

Consider how you react when you are involved in discussions of racism or race-based discrimination in Canada. How often do these discussions cause you to…						
		Never	Rarely	Sometimes	Often	Very Often
1	Leave the room	1	2	3	4	5
2	Listen without responding	1	2	3	4	5
3	Respond without arguing	1	2	3	4	5
4	Argue your position	1	2	3	4	5

Consider how you feel when you are involved in discussions of White privilege in Canada. How often do these discussions make you feel…						
		Never	Rarely	Sometimes	Often	Very Often
1	Confused	1	2	3	4	5
2	Attacked	1	2	3	4	5
3	Guilty	1	2	3	4	5
4	Angry	1	2	3	4	5
5	Unsafe	1	2	3	4	5
6	Sad	1	2	3	4	5
7	Drained/Exhausted	1	2	3	4	5

		Never	Rarely	Sometimes	Often	Very Often
	Consider how you react when you are involved in discussions of White privilege in Canada. How often do these discussions cause you to…					
1	Leave the room	1	2	3	4	5
2	Listen without responding	1	2	3	4	5
3	Respond without arguing	1	2	3	4	5
4	Argue your position	1	2	3	4	5

Appendix F: Adapted PDSA Worksheet for OIP

Table 7

PDSA Worksheet Adapted from Christoff (2018)

PDSA Worksheet			
Project Name Date of Training Date of PDSA Review	Completed by:		
PLAN Briefly describe the topics covered in this session: How will you know there is an improvement? What does this change impact? What do you predict will happen? **PLAN**			

	List the tasks necessary to complete this test (what):	Person responsible (who)	When	Where
1				
2				
3				
4				
5				
6				

DO		Yes	No
Was the training carried out as planned?		☐	☐
Record relevant observations:			
What did you observe that was not part of the plan?			

STUDY

Did the result match your predictions?

Yes ☐   No ☐

Compare the result of this training to previous results:

What did you learn?

ACT (Decide to Adopt, Adapt, or Abandon)

What practices should be adapted for the next session?

What practices should be adopted for the next session?

What practices should be discarded?

Appendix G: Knowledge Mobilization Plan

Form A

Knowledge Mobilization Plan (Ontario Center for Excellence in Child and Youth Mental Health, 2019)

Doing more with what you know

WHAT

What knowledge do you want to mobilize? What are the main messages that you want to share?

WHY

Why are these messages meaningful? Why should others see or use this product?

Why are you doing this? What impact are you trying to have with your KMb efforts?

WHO
COLLABORATE

🔟 general public 🔟 other:

- ❿ change attitudes   ❿ influence policy action
- ❿ change behaviour or practice ❿ share knowledge, experience or tools ❿ engage stakeholders ❿ validate, legitimize or defend a position
- ❿ fulfill funding requirements ❿ other:
- ❿ generate interest or awareness

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Who are your project partners? Who else is involved in mobilizing this knowledge and evidence?

- ❿ caregivers and families   ❿ government partners
- ❿ children and youth   ❿ researchers
- ❿ community partners   ❿ service providers
- ❿ decision-makers   ❿ volunteers

What do your partners bring to the table? How will they assist with planning, doing and evaluating your KMb efforts?

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Not all partners will be involved at the same point in time or to the same degree. Some partners may be involved from idea formulation and straight through to the end of your initiative, while others may only be involved at certain points in time. How will *your* partners be engaged in your KMb efforts?

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Who are your champions and key mobilizers? Who will help support and promote

your KMb efforts?

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Who are you trying to reach and engage? Who are you targeting?

WHO
CONNECT

🔟 caregivers and families   🔟   policy-makers

🔟 children and youth   🔟   research funders 🔟   decision-makers 🔟   service providers

🔟 general public 🔟   other:

🔟 media

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How have you involved your intended knowledge users or target audience in

developing the key message(s) you are trying to share?

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HOW

How will you get your message(s) across? What strategies do you think will help you to reach your intended knowledge users best? Keep in mind that these are just ideas. Get creative!

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PRODUCTS   EVENTS

- blue   blog   ☐   annual meeting
- ☐   case study   ☐   awards ceremony
- ☐   e-newsletter   ☐   conference
- ☐   educational material   ☐   debate
- ☐   fact sheet   ☐   forum
- ☐   FAQ   ☐   interactive workshop
- ☐   handbook   ☐   lunch and learn
- ☐   journal article   ☐   media event (e.g. TV or radio segment)
- ☐   magazine article   ☐   panel
- ☐   newspaper article   ☐   presentation
- ☐   podcast   ☐   symposium
- ☐   PowerPoint presentation   ☐   training session
- ☐   press release   ☐   other:
- ☐   promotional material
- ☐   reference list   NETWORKS
- ☐   report
- ☐   chat room
- ☐   research summary
- ☐   community of practice
- ☐   success story
- ☐   discussion board
- ☐   toolkit
- ☐   listserv
- ☐   video
- ☐   online forum
- ☐   webinar
- ☐   social media
- ☐   website content
- ☐   other:
- ☐   wiki   ☐   other:

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Why are you choosing these strategies? Why are they best for you? Consider what resources you have available, how complex the information is that you are trying to mobilize and how connected your target audience is to this information.

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What resources will you need for your KMb efforts?

- budget
- honoraria
- information technology support
- materials
- meeting expenses

- personnel or human resources
- time
- travel
- volunteers
- other:

WHEN

When do you intend to implement this plan? Ensure that your timelines make sense for both the target audience as well as the mobilizers. Are there other things going on at that time that will have an impact on your plan?

Take a quick look back at why you are doing this. Do you feel that you have the time and resources that you will need to achieve your intended impact? Check out the KMb plan outline (Appendix A) to explore your timeline.

MEASURE

How will you know if you have achieved your goals?

What type of indicators will you use to measure your KMb efforts?

- reach indicators *(# distributed, # requested, # downloads/hits, media exposure)*
- usefulness indicators *(read/browsed, satisfied, usefulness of, gained knowledge, changed views)*

🔟 use indicators *(# intend to use, # adapting the information, # using to inform policy/advocacy/enhance programs, training, education or research, # using to improve practice or performance)*

🔟 partnership/collaboration indicators *(# products/services developed or disseminated with partners, # or type of capacity building efforts, social network growth, influences, collaborativeness)*

🔟 practice change indicators *(intent or commitment to change, observed change, reported change)*

🔟 program or service indicators *(outcome data, documentation, feedback, process measures)*

🔟 policy indicators *(documentation, feedback, process measures)*

🔟 knowledge change *(quantitative & qualitative measures)*

🔟 attitude change *(quantitative & qualitative measures)*

🔟 systems change *(quantitative & qualitative measures)*

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How will you collect this information? How will this information be analyzed?

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Take a moment to reflect on these guiding questions for evaluation.

🔟 Who will be most affected by the evaluation of this product/initiative? What kind of information do they need?

🔟 How can you make your evaluation information most valuable and useful?

🔟 Which evaluation questions are critical to produce useful and meaningful findings?

🔟 What internal/external factors do you need to consider in evaluating your KMb efforts?

🔟 How have similar products/initiatives been evaluated in the past?

🔟 Will you focus on process or outcome information?

🔟 Will you use quantitative measures, qualitative measures, or a mix of both?

ⓚ   Do evaluation tools exist already or do you need to create your own?

Reference/resource: Barwick, M. (2008, 2013). Knowledge Translation Planning Template. Toronto, Ontario:

The Hospital for Sick Children. Retrieved from: http://www.melaniebarwick.com/training.php