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A Brighter Future for SMS: Cultivating School Coherence Through a Shared Vision

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A Capstone project submitted in partial fulfillment of the requirements for the degree of Doctor

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Nicole Herndon

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"To strive, to seek, to find, and not to yield." -Alfred, Lord Tennyson

Heather Holcomb

We are stronger for taking the road less traveled and my personal journey has been filled with many twists and turns. I am truly thankful for my family and friends that have unconditionally supported me through the ups and downs. Today, I am more confident, more independent, and more grateful than ever before.

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Audra Krupp

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Abstract

Staunton City Public Schools submitted an RFA (Request for Assistance) to Virginia Commonwealth University (VCU) to address concerns at Shelburne Middle School related to teacher satisfaction, student discipline, and student achievement. Document and data analysis, a site visit, and partner interviews surfaced issues of organizational fragmentation; the capstone team identified the need for a collaboratively constructed and implemented vision to better cohere the school. Through document analysis and stakeholder surveys, our mixed methods study aimed to understand stakeholder views on three aspects to support the work of the leadership team at SMS. First, the capstone team identified the needs in the current state that stakeholders of staff, students, and parents felt were barriers towards deeper change. Next, our study sought to elucidate the top academic values and priorities stakeholders wanted to include in a vision statement. Finally, our survey results identified the future hopes or aspirations stakeholders desire once the vision is fully actualized. Findings from our research showed areas of alignment among stakeholders in both the current and future states. Recommendations focused on addressing current needs, along with providing a framework and timeline for school leadership to re-engage stakeholders in next steps for the development of a shared, collaborative vision.

Keywords: school vision, organizational coherence, transformational leadership, school improvement, academic priorities, academic values, stakeholder collaboration

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Chapter 1: Introduction

Nestled in the rolling expanse of Virginia's Blue Ridge mountains, the city of Staunton is home to 25,000 residents (US Census Bureau, 2021). As the independent city's sole school system, Staunton City Public Schools (SCPS) operates one preschool center, three elementary schools (grades kindergarten through 5), one middle school (grades 6-8), and one high school (grades 9-12) (Staunton Schools, 2022). SCPS, like many school districts across the United States, continues to recover from the fallout from the Great Recession of 2007 (Leachman et al., 2017). Researchers and policy analysts alike point to the long-term impacts of the Great Recession on the US education system, with lingering issues including: budgetary challenges, declines in student achievement, increased student absenteeism, loss of experienced teachers in the classroom, and alarming challenges of sustaining the future educator pipeline (Goldhaber et al., 2016; Leachman et al., 2017; Partelow & Baumgardner, 2016). These long-term constraints concerned school division administrators even before they were exacerbated by the stressors of the COVID-19 pandemic, with impacts on teachers including increased resignations, along with unsustainable levels of fatigue and demands (Carver-Thomas et al., 2021; Kim et al., 2021; Locke, 2022). Staunton City Public Schools, like other districts across the US, reports that it has not been immune to these problems.

Request for Assistance

In the winter of 2022, the district office of Staunton City Public Schools (SCPS) submitted a request for assistance (RFA) to the Department of Education Leadership at Virginia Commonwealth University (VCU); the request centered on support to restructure scheduling practices at Shelburne Middle School, or SMS (see Appendix A). SCPS district leaders noted that the school had outlived the current multi-bell schedule design, which had evolved to fill gaps

wrought by resource declines since the recession. The district leaders also pointed to concerns that "elective classes may or may not connect explicitly to the next grade level or as a part of a sequence to coursework in high school" (see Appendix A). Class size data showed imbalance in class sizes, potentially due to factors including scheduling for co-taught, honors, and regular level classes (see Appendix A). These were a few examples of systems and structures that were not meeting current needs. The district sought support from an EdD Capstone Team to examine a streamlined approach to master scheduling centered on the following question: "how does a master schedule impact student discipline, student achievement and teacher satisfaction?"

To shape the specific Problem of Practice (PoP) that would be the focus of the capstone work, the Capstone Team began a review process of both public and partner-provided documents and met with the SCPS leaders who had requested assistance. While the initial RFA pointed to a PoP centered around the master schedule, ultimately the Capstone Team identified the PoP as one related to fragmented school culture, stakeholders, and systems and the need to align these elements with a clear, collaborative vision. The following sections explain how the team moved from master scheduling to vision as the focus of our work with SMS.

Review of Shelburne Middle School Demographics and Achievement Scores

Shelburne Middle School serves approximately 570 students in grades 6-8. Figure 1 provides an overview of the student demographics of the school.

Figure 1: Shelburne Middle School Demographic Information FY 22-23
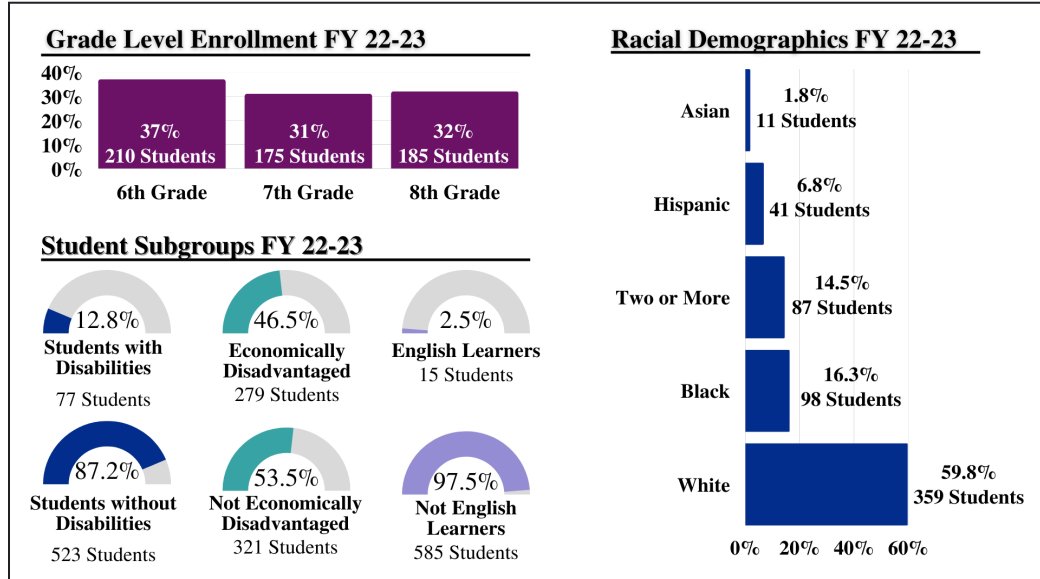
The school employs 67 faculty members. Figure 2 summarizes the breakdown of instructional faculty and staff at Shelburne Middle School (L.Warren, personal communication, July 24, 2022).

Figure 2: Shelburne Middle School Faculty Roles FY 22-23
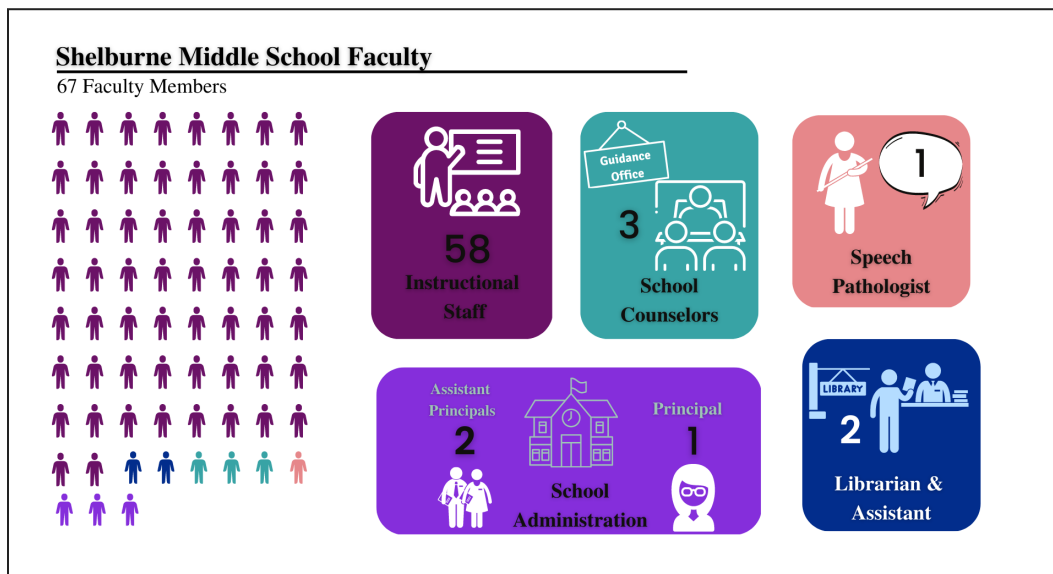
Note. The faculty listed in this figure does not include operational staff including cafeteria workers, custodians, and administrative assistants (L.Warren, personal communication, July 24, 2022).

Eighty-seven percent (58/67) of Shelburne Middle School's faculty support students in classroom teaching roles. In the 2021-2022 school year, Shelburne Middle School's teaching faculty included both content area teachers and specialized instructional coaches. Core content area teachers include the subjects of math, science, language arts, and social studies. Additional world language courses at the feeder high school level are available for SMS students to access. The teachers of the high school courses are part of the staffing allocation at the feeder high school, and are not part of the middle school's staffing. Figure 3 shows the instructional staffing used in the master schedule to support student learning at SMS.

Figure 3: Shelburne Middle School Instructional Roles FY 22-23
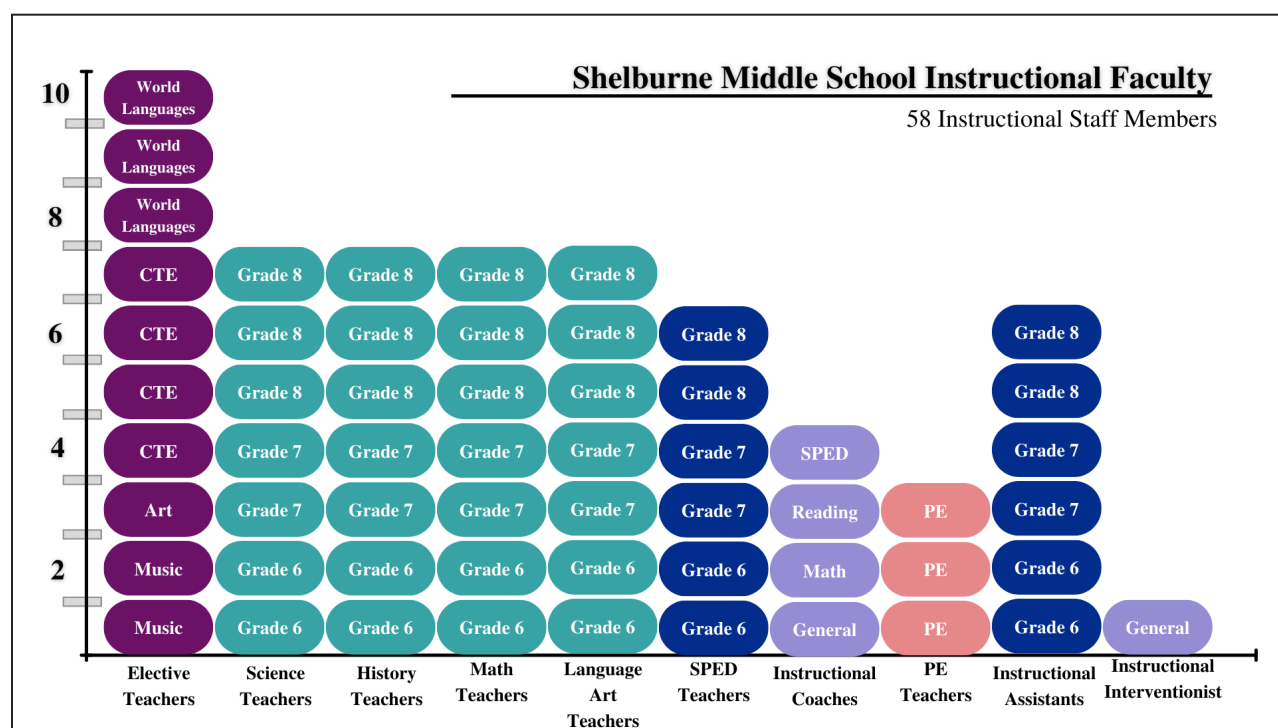
Note. **Purple** reflects elective-based teachers including world language, art, music, and career and technical education. **Teal** represents the core academic areas of science, social science and global studies (SSGS), mathematics, and language arts teachers. **Pink** denotes physical education. **Navy Blue** refers to special education support of teachers and instructional assistants. **Lavender** notes the academic coaches and interventionists that push into classrooms (L.Warren, personal communication, June 16, 2022).

During the post-recession recovery period at SMS, pass rates on the 8th grade End of Course (EOC) English Standards of Learning (SOL) plummeted from a high of 87% in 2009 to a low of 59% in 2018 (VDOE, 2022). Students with disabilities showed an even lower 18% pass rate in 2018 (VDOE, 2022). Conversely, students averaged an overall 73% pass rate on the EOC Grade 6-8 Math SOLs in 2018 (VDOE, 2022). These dichotomous SOL scores highlighted concerns with gaps in necessary literacy skills for students.

Figure 4: Shelburne Middle School English Reading SOL Pass Rates 2012 - 2022
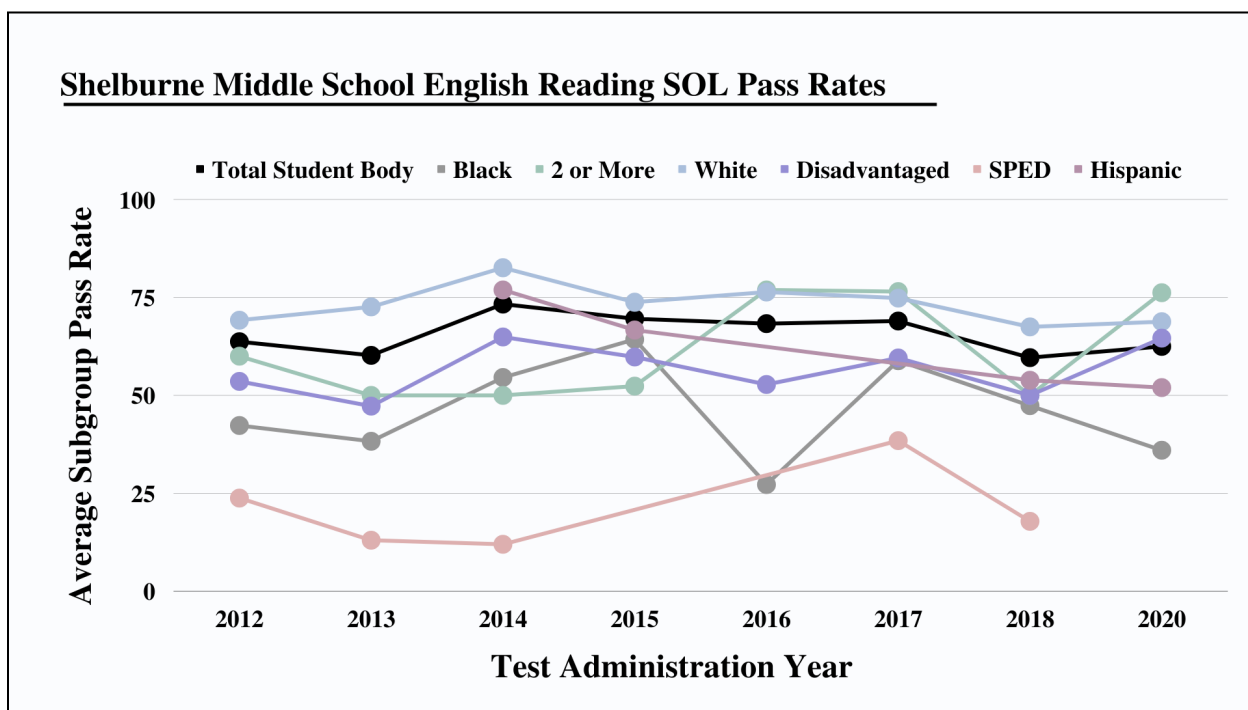
Note. Asian, American Indian, and Native Hawaiian subgroups represent less than 2% of the overall student body (Virginia Department of Education, Retrieved July 2022).

Insights from First Partner Meeting

In June of 2022, the Capstone Team met with two district level leaders and the newly appointed middle school principal (the Capstone Partners) to gain historical background, broader community context, and a better understanding of the goals and needs of the school. From this

initial meeting, two changes were salient to the Capstone Team in its beginning analysis of the problem of practice (PoP). The first change was that a new principal had been appointed. Principal Warren and her assistant principals had not been part of Shelburne Middle School (SMS) when the RFA was submitted to VCU in January 2022. Moving from an Assistant Principal role in Staunton High School, Principal Warren was a first time principal in her first middle school role. The second important change was that Principal Warren had put in place a new single bell schedule for the 2022-2023 school year. Our pilot notes from a site visit in September 2022 captured highlights of these bell schedule adjustments and other school-wide policy changes enacted in the new school year. These extensive changes, implemented since the submission of the RFA in January 2022, added new information to inform the Capstone PoP.

Table 1: Shelburne Middle School Changes FY 22-23

Shelburne Middle School New Changes FY 22 - 23	
Staffing	- New administration team including 1 principal and 2 assistant principals - Two new school counselors - Expansion of hiring career switchers to the teaching staff - Instructional coaches assigned to both new and teachers and teachers in need of specific support
Scheduling	- One centralized bell schedule for the entire school - Removal of a daily remediation block - Reduction of the number of lunch shifts - New start and end time to the school day
Organizational	- Initial stages of a school renovation - Assigning classrooms to centralized spaces
Operational	- New student discipline program, grades 6-12 - Ban on student cell phone usage during the school day, grades 6-12 - Administration commitment to being visible in halls, classrooms, lunch duty, and assigned to a specific grade level
Climate	- PTA commitment to chaperone dances and fund spirit gear for students - Administration commitment to teacher appreciation - Daily lesson with students to address social, emotional, and academic needs through 15 minute lessons during homeroom (referred to at SMS at HERD)

Despite the positive steps initiated by new leadership, challenges remained that could not be addressed through these initial efforts alone. The meeting surfaced several crucial themes, including instructional silos and fragmentation within both the school and student cultures at SMS. The partners identified concerns about variable stakeholder support and expectations for the school, disconnects between educators based on content area and grade level, and little evidence of shared goals. We noted how these identified challenges were contributing to the original RFA concerns about student achievement, student discipline, and teacher satisfaction.

Instructional Silos

In the initial interview, district leadership pointed to issues teachers experienced working in the prior multibell master schedule. They noted that the complex bell schedule at SMS secluded teachers from their professional community and created feelings of isolation. Further, although SMS has five instructional coaches embedded within the master schedule, they had been routinely pulled first from the classroom for substitute coverage (L.Warren, personal communication, June 30, 2022). The loss of daily professional support and observations to inform future professional development inhibits growth for both teachers and students, reinforcing the concerns with student achievement and student discipline.

The partners highlighted how the lack of schedule alignment created tension within general education and special education co-teacher teams. Special education teachers had expressed concerns to district leadership that the stress and fatigue has led some general education teachers to revert to instructional practices that are not always in the best interest of students. The administrators relayed that in some cases, special education teachers responded to the lack of flexibility in the general education classroom by adding specific requirements into students' individualized education plans (IEPs). Special education teachers also raised concerns about being put into a position where IEPs are being "weaponized" in order to get their general education colleagues to differentiate instruction (J. Wolfe, personal communication, June 30, 2022). District leadership also expressed deep concerns with the dynamics between special education and general education teachers, and the unacceptable underachievement of students with disabilities at SMS. The partners and Capstone Team both recognized that new leadership and organizational changes alone would not "fix" this long-term issue.

Fragmented School Culture

The partners also described how the complex bell schedule had fractured the school culture. The principal explained that teachers had been devoted to their specific grade level school team (L. Warren, personal communication, June 30, 2022). However, this came at the expense of maintaining school-wide practices. As explained by Warren, each of the seven teams at SMS had created their own student discipline plan, resulting in little cross-team monitoring of students on other teams; further, elective and physical education teachers had to implement seven different student discipline and reward systems (L. Warren, personal communication, June 30, 2022). The disconnect between instructional teams may have eroded broader commitment to the school-wide culture. Staff involvement in attending or supervising extracurricular activities had been low, despite many staff members having long-term roots within the Staunton community. The fatigue of balancing multiple schedules, instructional practices, and student discipline plans had contributed to overall low staff morale. While changes implemented for the 2022-2023 school year would likely improve some dynamics, fears remained that poor communication, collaboration, and isolation would persist without additional intervention.

Fragmented Student Experience

The partners reported that students were experiencing numerous impacts from a fragmented instructional experience. Students' access to broader school opportunities was limited. Peer interaction was often contained within a particular team. With seven different student lunch shifts, students within a team rarely interacted socially or academically with their grade level peers or other grade levels. Moreover, elective pathways were limited to computer technology, music, art, and world languages. District leadership shared that while new electives have been added at SMS, these electives did not align with those offered at the high school (L.

Warren, personal communication, June 30, 2022). These limited options and interactions at Shelburne are a stark contrast to the multi-grade level peer interactions and robust elective course pathways available to students when they enter Staunton High School. Ultimately, the current structures did not support the holistic needs of students, impacting their overall wellbeing, student achievement and student discipline. The partners and team agreed that SMS students deserved more.

Shaping and Shifting the Problem of Practice

While Shelburne's RFA originally focused on improving the school through a re-designed master schedule, the Capstone Team considered what we learned through our two partner interviews, our site visit, a review of publicly available student data, and other materials shared by SMS staff. Our team came to believe that student discipline, student achievement, and teacher satisfaction issues raised by the original RFA were all symptoms of a more complex problem than a master schedule. The team believed–and the principal confirmed–that looking more closely at the school community as a whole was necessary before a master schedule could be created to serve the needs of the community. We continued to review the available information to determine a feasible and productive problem of practice that we could address with the hope that this work would lay a foundation for the school to develop a coherent master schedule in future years.

A search of research literature found no clear connection between master scheduling and improvement of the specific areas of partner concern. However, the literature illustrated that vision and leadership are closely tied to master scheduling practices. Once a school has established a clear vision, leaders who use that vision to guide the master scheduling process are better able to set up students and teachers to meet the school's goals (Brown, 2016; Casillas,

2018; Schwartz, 2016; Tubin, 2015). A vision statement serves as a bridge to move an organization from its current reality to an idealized, future state (Kotter, 1996). Leaders can utilize a schedule change to indicate a commitment to making pedagogical changes to live up to the vision, or idealized future state of the school (Schwartz, 2016). At its best, a master schedule acts as a tool to support the school vision. Upon closer examination of the context and the extant literature, we realized that SMS has been operating without a collaboratively created and inclusive vision statement that could anchor future actions.

Furthermore, the new principal alluded to this absence of a vision statement during the opening faculty meeting we attended during our September 2022 site visit. She shared that as the new principal and could not find it. When faculty were similarly unable to find a copy to provide her, Principal Warren used it as an opportunity to collaborate. She stated to the group "I don't like to make all the decisions. It should be about you guys, staff, and community," (L. Warren, personal communication, September 19, 2022.) She directly expressed to our Capstone Team that she was particularly interested in what different stakeholders wanted to see in the SMS community.

Based on her input as well as the need for a shared vision to guide systems like a master schedule, and the leadership and operations changes affirmed through our partner discussions, the team worked to reframe the original RFA to generate an urgent, yet actionable, feasible, and strategic PoP for the team to address in this Dissertation in Practice (Perry et al., 2020). The Capstone Team defined the problem of practice as one of fragmentation. Because the school culture, stakeholders, systems, resources, and structures are not linked by shared school vision, the fragmented system contributed to low teacher and student satisfaction, instructional inconsistencies, and low test score achievement.

The section below discusses the team's analytical process to develop our redefined Problem of Practice (PoP), the Theory of Change (TOC) guiding our work, and the proposed questions to address to help actualize this TOC.

Problem Diagnosis

Our team engaged in two iterations of problem diagnosis with improvement science tools to examine the relationship between available information and the original RFA. With so many new initiatives on the horizon for SMS in the 2022-2023 school year, it was important that we took time to map out how these various factors were contributing to the lived experience of stakeholders at SMS. During these two cycles of problem diagnosis, the Capstone Team shifted from the master schedule as the main problem to a need for a shared vision statement. In short, we determined that the master schedule was not the primary tool for addressing the silos and fragmentation seen in student achievement, discipline, and teacher satisfaction, especially in light of the changes in the schedule already in place for the new school year.

Users at the Center: Systems Mapping

In mapping the school landscape, we considered how users (students, teachers, and parents) experience the existing master schedule through the lenses of classroom engagement, school engagement, and academic achievement (see Appendix B). The results of this mapping led us to identify three strands:

1. Stakeholder (students, parents, and teachers) requests within a master schedule

2. School leadership priorities to include in the master schedule

3. Our concerns with what is not being addressed through the master schedule related to

student achievement

In this stage of problem analysis, we began to notice that the partner's impetus for creating a master schedule addressed operational and organizational needs, but that instructional needs were not visibly addressed despite numerous challenges related to instruction identified by the partner and in our document review. Specifically, SMS is at high risk for losing its accreditation status due to alarming rates of failure on the 8th grade Reading SOL. Moreover, both the interview and SOL data point to significant concerns with the failure rate on the 8th grade Reading SOL for students with disabilities (see Appendix C). During the interview, district level leaders expressed concerns with how co-teaching relationships operate in the classroom, noting that "SPED teachers [were] starting to say we are weaponizing the IEP because we can't get gen ed to move anymore to differentiate instruction" (J. Wolfe, personal communication, June 30, 2022). Ongoing Reading SOL data supports concerns about the progress of special education students related to necessary literacy skills. The available documents and initial interview did not reveal information about how the design of the master schedule will combat these gaps in learning. Additionally, the RFA and interview noted concerns with elective alignment and access, but it remained unclear during this round of analysis how the master schedule could address these concerns.

Root Cause Analysis

In our next iteration, we utilized a fishbone diagram to define the associated factors that contribute to the ongoing problem on the "bones" or lines of the fish (Perry et al., 2020). It was in this iteration that the Capstone Team clarified the master schedule as a symptom of a more significant issue within the school.

Figure 5: Fishbone Diagram Shelburne Middle School

Shelburne MS Fishbone Diagram
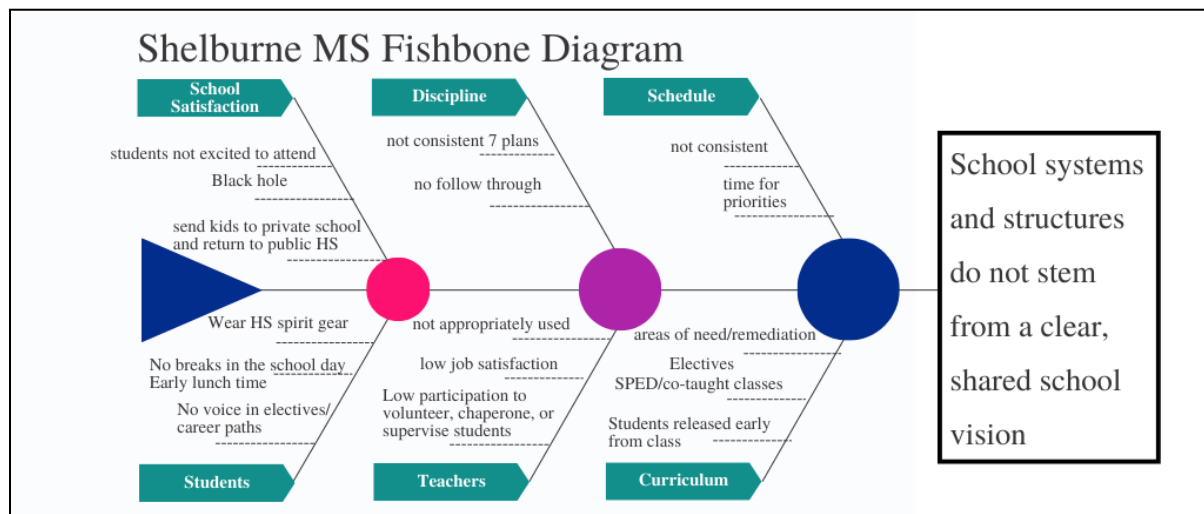
Confirming the Capstone Problem of Practice

During our September 2022 site visit to SMS, principal Warren asked for the staff's help in locating a copy of the school's vision statement. We observed during the faculty meeting that staff were not able to pinpoint the vision, nor were staff able to share what they understood to be the current vision. Gurley et al. (2014) state that a school vision is "explicit about where they are headed, what they are about, and how they will know when they have arrived" (p. 223). Missing from SMS was a clearly defined vision, or future state on where they are going, and this impacted how various systems within the school operated, including the design and implementation of the master schedule. The absence of a shared school vision has had a cascading impact on stakeholders' lived experiences as teachers and learners, along with impacts on the effectiveness of operational and instructional systems within the school.

The site visit also included the opportunity to talk directly with the principal. She noted that several of the implemented changes had immediate, positive effects in stabilizing the culture of the school. Warren also shared that since the school was in a more settled space, the staff had

the opportunity to consider future possibilities in ways that had not been previously possible (L.Warren, personal communication, September 19, 2022). The site visit crystallized our understanding of disconnects driving the ongoing fragmentation of some aspects of the school organization. Systems at SMS operated independent of a shared idea of how the work will move the school towards a well defined, idealized future state.

The team also learned through the site visit that the faculty were eager to share their thoughts and ideas about the future direction of SMS. Our pilot notes captured concerns as well as hopes various faculty members shared about changes that would benefit the SMS community. For example, a culinary teacher shared their hope for redesigning electives for students to deeply explore career paths. The current design and titles of electives had been created without input from the electives teacher and were seen by some of the teachers as surface level explorations of content. The technology education teacher expressed excitement at the upcoming renovation of the technology labs and the possibilities for students and future courses the school could offer. In short, SMS has faculty who want to support students and are excited to imagine future possibilities. Our notes showed that faculty were entering these conversations about designing a future SMS from varying viewpoints, which again supports the need for a shared vision to guide future work.

The Capstone Team defined the Problem of Practice as one of fragmentation. Because the school culture, stakeholders, systems, resources, and structures are not linked by shared school vision, the fragmented system impedes connection and collaboration to improve instruction. This contributes to the low teacher and student satisfaction, instructional inconsistencies, and low student achievement of partner concern. We have centered the PoP on the absence of a shared school vision in guiding the work of all systems and teams within SMS. As illustrated in Figure

6, the team conceptualized vision as the focal point from which all other systems derived, including the master schedule.

Figure 6: Visual of the Problem of Practice
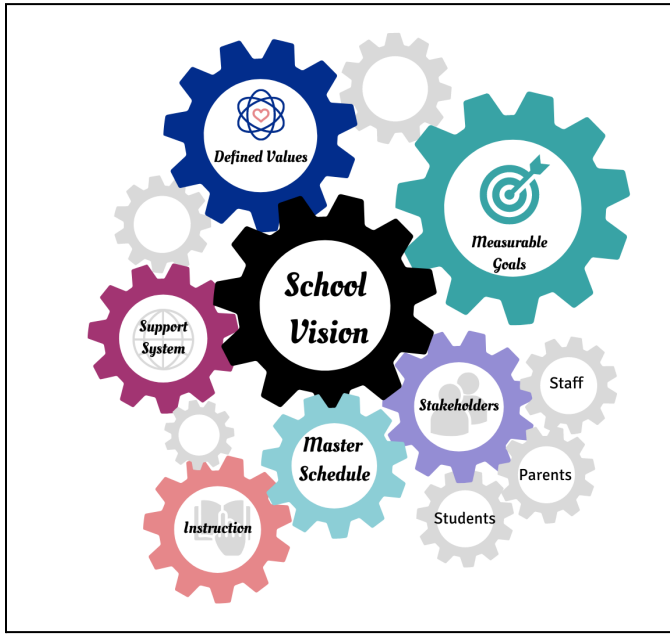
Theory of Change

A Theory of Change explains how actions will help improve a system (Perry et al., 2020). Based on the confirmed PoP and its early analysis and review of contextual data, the Capstone Team developed the following Theory of Change (TOC).

Theory of Change

If School Leadership creates a collaborative school vision that is

- Data driven both in response to current needs reflected in results and measurable to monitor progress
- Reflective of and responsive to current school conditions
- Centered on student needs/relationships
- Inclusive of community voice so it is shared among teachers, staff, families and students
- Grounded in the literature

Then Shelburne Leadership will

- Align school culture, systems and structures–including its master schedule-to the shared vision
- Promote stronger relationships among all stakeholders and deeper connection between stakeholders and the school

And Shelburne Middle School will

- Improve teaching and learning relationships among students and staff
- Provide students with a responsive and engaging learning environment

Therefore, Staunton City Schools will increase

- Student academic achievement
- School community satisfaction
- Positive school behavior and management

This Theory of Change guided the Capstone Team to propose to help develop the shared school vision and then offer guidance on how systems, including the master schedule, align to bring the school vision to fruition. The school vision can act as a tool to move from a state of fragmentation to one of organizational coherence. With this direction, the Capstone Team developed two overarching areas of inquiry to drive its support of Shelburne's organizational

improvement work. These align with Kotter's (1996) conception of a vision statement as the bridge from its current reality to an idealized, future state and inform the research questions below that we will detail further in our methodology section.

Research Questions

The Capstone Team endeavored to help SMS include stakeholder (student, teacher, parent) voice in creation of a shared, collaborative vision statement by addressing the following guiding research questions:

> **RQ1: Understanding the current state**. What are current issues or concerns stakeholders feel need to be addressed at SMS?
>
> **RQ2: Providing direction for the future state.** What values and academic priorities do stakeholders want SMS to prioritize?
>
> **RQ3: Cultivating coherence for the future state**. Once the vision is actualized, what outcomes do stakeholders want to experience?

Operational Definitions

Below are the terms and definitions utilized in our study and unless otherwise noted, are from the Public Education Leadership Project (PELP) Coherence Framework (Childress et al., 2011) and The Internal Coherence Framework (Forman et. al., 2017).

> **Organizational coherence:** Organizational coherence is the matrix of conditions, processes, and practices that must be aligned to cultivate change.
>
> **School culture:** The predominant norms, values, and attitudes that define and drive behavior in the school.

Stakeholders: The individuals and groups both inside and outside of the school, including students, faculty, staff, parents, community leaders, and organizations.

Structures: Structures prescribe how work in the school takes place. Structures include organization of people, distribution of responsibilities, and how decisions are made.

Systems: The processes and procedures that guide how work gets done. Systems are in place to ensure that individuals do not constantly have to reinvent the wheel in order to accomplish tasks.

Vision: A vision statement serves as a bridge to move an organization from its current reality to an idealized, future state (Kotter, 1996).

Significance

The Capstone Team positioned itself to support Shelburne in building a shared vision that will drive coherence across the organization. Given the turnover in leadership and the amount of day to day logistical management the new leadership team is immersed in, the Capstone Team's focus on collecting information to inform the school vision and future direction was important. The school leadership team's focus on improving some systems in the short term, while beginning to convene school staff and teachers towards creating a vision, in combination with the Capstone Team's work to bring stakeholder voice into that visioning process, can work together to improve the school experience.

Organization of the Capstone

This capstone is organized into five chapters. The first chapter provides historical and organizational context, our exploration and development of the PoP, and the significance of our organizational improvement work. Chapter two contains the literature review which helped the team to understand the PoP and guided the team's proposed work with Shelburne Middle School. Chapter three details our three main research questions and the design of our mixed methods

study in response to the questions. Chapter four outlines our findings from analysis of survey

data and document analysis. Chapter five shares recommendations for Shelburne Middle School.

Chapter 2: Literature Review

Our literature review highlights the important role a school vision can serve in maintaining coherence while addressing the leadership tension of daily demands and the need to lead the organization forward for continuous improvement. This tension to address daily demands and stressors can serve as a distraction from leading deeper organizational change. The competing demands can further fragment the culture (Kotter, 1996). The current K12 landscape is pulling leaders and educators in many directions to respond to daily stakeholder needs, growing accountability pressures for accreditation, and increased political scrutiny on lesson content from some members of the public and away from deeper change to improve school-wide systems (Kim et al., 2021; Schuessler, 2021). Additional pressures to address student learning loss in the ongoing COVID-19 pandemic and a national teacher shortage create additional stressful conditions in which school leaders may quickly react with band-aid solutions (Department of Education, 2021; Dorn et al., 2020; Erichsen & Reynolds, 2020; Natanson, 2022; Newmann et al., 2001). These stop-gap measures can further fragment the coherence of systems and ultimately erode the health and functionality of the organization (Licata & Harper, 2001; Newmann et al., 2001). In other words, band-aid solutions offer temporary fixes but may further fragment the organization.

Organization of the Literature Review

The literature review is organized into four sections. The first section draws from the literature to define school vision as this is the cornerstone of the team's Theory of Change. The second section recognizes the ongoing fragmentation concerns within SMS by exploring what it means to move from a fragmented organization to one of coherence. The third section focuses on understanding best practices associated with the development of a shared school vision as a

necessary tool to drive coherence forward. The final section examines key conditions for vision

leading to transformation. The team's exploration of the literature focused on three main

categories of questioning in response to the the Theory of Change and Problem of Practice:

1. **Why school vision?** What is the role of a school vision in transforming an organization
   from fragmentation to coherence? How does improved school culture, systems, and
   structures contribute to coherence?

2. **What is the visioning process?** What are best practices related to the development of a
   school vision?

3. **How does visioning impact school transformation?** How does the shared vision
   statement empower organizational change?

Our team utilized the available databases through Virginia Commonwealth University to

analyze peer reviewed articles from EBSCO, ERIC, Taylor & Francis, SAGE, and ProQuest. The

initial search focused on the years spanning from 2010 to 2022. Our initial searches captured

thousands of articles using the following terms: middle school scheduling, academic

achievement, recess in schools, vision statements, organizational coherence, coherence, school

master schedules, organizational change, visionary leadership, school change. In subsequent

searches, we narrowed the focus to articles discussing schools' coherence, vision, shared vision,

visioning, creating a vision, strategic change, and vision as we refined our POP that shifted away

from the original RFA's focus on the master schedule. We furthered our search to include

publications as early as 1990 to deepen the research that specifically targeted school vision or

organizational vision. We also reviewed publications from business news reports and

professional education organizations since both highlight best practices and case examples on the successful implementation of vision by aligning organizational systems.

Section One: Defining School Vision

School vision is defined throughout the literature as the idealized future state (Kotter, 1996). Gurley et al. (2014) state that a school's vision statement reflects the schools ethical and social values to which it aspires to educate. Bolman and Deal (2017) suggest that the vision statement is an organization's core ideology painted into an image of the future. According to Murphy and Torre (2015), vision statements convey hope, commitment to success, and student focused outcomes. This team defines the school vision statement as a declaration of organizational purpose highlighted by aims of school values and academic priorities for which student growth is defined (see Figure 7).

Figure 7: School Vision Statement
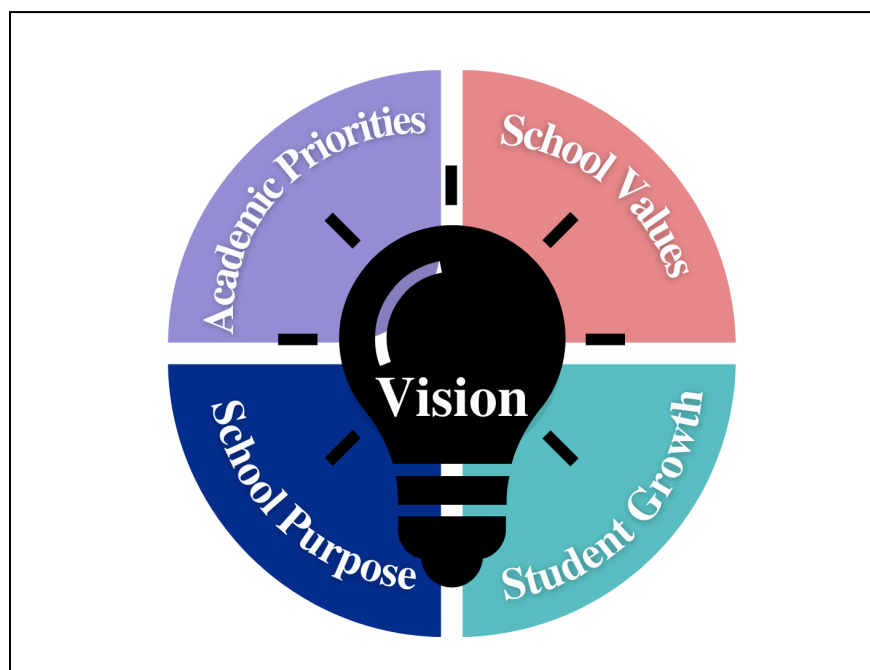
The shared commitment and written quality of a school vision statement directly influence a school's ability to implement change (Gurley et al., 2014; Iftach & Shapira-Lishchinsky, 2019; Kurland et al., 2010; Newmann et al., 2001). The vision instructs both systems and stakeholders on how to operate within the organization (Kose, 2011). A vision is overarching across all systems within an organization and serves as the foundation for transformational change (Kantabutra & Avery, 2010). As Kose (2011) noted on the transformational leadership practices of school principals, vision statements can provide "future direction for decision making" (p. 121). Jackson (2021) frames a school vision statement as "the promise you and everyone at your school make to your students" (para. 3). It is this promise or hope of an improved future that vision provides to effectively drive the work of a school towards continuous improvement for students (Gurley et al, 2014; Kurland et al., 2010; Murphy & Torre, 2015).

A quality vision statement contains several elements necessary to guide sustainable change within an organization (Kurland et al., 2010; Murphy & Torre, 2015). Researchers suggest constructing a school vision to include language that orients towards the future, sets a direction, establishes purpose, provides values, and is measurable in attainment (Bolman & Deal, 2017; Kantabutra & Avery, 2010; Kotter, 1996). A quality vision statement is attainable and applicable to all school stakeholders (Blanchard & Stoner, 2011). The careful consideration of each of these elements guide organizational transformation.

Roadmap of School Improvement

In the exploration of our first question of the literature, we found that the vision statement can support organizational coherence, setting up conditions for improved school culture, systems, and structures. A vision statement provides the initial roadmap or blueprint for schools

to use to determine their next steps of improvement. In a study examining the impacts of instructional program coherence in elementary schools in Chicago Public Schools, Newmann et al. (2001) found that a shared understanding of vision, including the purpose, focus, and shared values regarding student learning were vital to how instructional decisions were made. Through this shared understanding, schools were more efficiently able to make decisions about which programs to implement and which to eliminate as they became detractors. Kotter (1996) notes that direction setting can reduce wasting time on distractions. At its best, direction-setting allows schools to make decisions and implement programs with a focus on how these outcomes most positively lead to achieving the stated vision.

Casillas (2018) describes aligning the school's core values to the work of their master scheduling system as principal of Roosevelt International Middle School in San Diego, California. By first being clear that the school values access to rigorous learning, the team could use student data to make changes to the design process, reduce barriers to opportunities, and work with teachers on needed instructional changes (Casillas, 2018). Additionally, school teams focused on how school culture would provide tools to foster a sense of belonging between peers and in student-teacher interactions (Murphy & Torre, 2015; Weilbacher, 2019). Instructionally, teachers' lesson plans would balance appropriate scaffolds and focus on equitable access to rigorous learning for all students in all courses (Hammond, 2015; Newmann et al., 2001). Understanding the core values helps stakeholders see how they can make a direct impact on fulfilling the vision (Gurley et al., 2014; Iftach & Shapira-Lishchinsky, 2019; Kurland et al., 2010; Oh et al., 2018).

School vision statements can leverage organizational coherence and provide a gateway to long term change (Wilson, 2003; Zimmerman, 2006). As discussed further in sections three and

four, the process of creating a quality school vision statement provides the catalyst for school improvement (Blanchard & Stoner, 2011). With effective visioning processes to engage all school stakeholders, the school vision becomes the center of a school's systems, structures, and practices (Rafferty & Griffin, 2006; Robinson et al., 2017). Kouzes and Posner (2017) allude to the idea of shared vision to motivate, energize, and solicit commitment to the cause.Vision as the focal point provides long term support for organizational coherence.

Section Two: Cultivating Organizational Coherence

Organizational coherence is the alignment of conditions, processes, and practices to cultivate change. Forman et al. (2017) define internal coherence as the ability of school educators to align resources and engage in collective learning to provide students with richer educational opportunities. Similarly, Childress et al. (2011) provide a framework for school coherence that shows the interdependence of school culture, systems, structures, resources, relationships, and environment that can influence the school's instructional core of teachers, students, and content. In short, the process of transforming organizations must attend to the interactions of these elements to build coherence. The political frame of organizational change, as discussed by Bolman and Deal (2017), also recognizes the need for alignment, or coherence, by acknowledging "the importance of individual (and group) needs but emphasiz[ing] the scarce resources and incompatible preferences which cause needs to collide" (p. 190). For this Problem of Practice, coherence is further envisioned as the responsive network of leadership, people, and climate around a vision (see Figure 8). Through an anchoring school vision, coherence among these elements can be strengthened.

Figure 8: School Coherence

The Intersection of People, Leaders, and Climate

School climate is defined through the circumstantial experience of school surroundings, staff actions, and community behaviors. Schoen and Teddlie (2008) propose the school climate is a social dimension of overall school culture. According to Bolman and Deal (2017), the most important organizational values of a community are those experienced by the community regardless of what is written in the vision statement. Principals, as school leaders impacting change, need to focus more on the implicit message of a school's climate rather than spoken words (Pawlas, 1997). Key components of a strong school climate include collective behaviors, shared laughter and humor among stakeholders, storytelling, shared ownership of the school, internal and informal networking, rituals and ceremonies, and collegiality (Pawlas, 1997). Thus, the aspirational value of the school vision should encompass stakeholder experience (Blodget,

2022). In essence, a coherent organizational vision is integrated into the fabric of the organization (Hedges, 2012; Van der Westhuizen et al., 2005).

The school climate is impacted by external forces and past experiences of stakeholders (Blodget, 2022; Miller, 2022; Zimmerman, 2006). Factors such as past failed change attempts, personal security, and fear of the unknown may cause resistance and environmental ambiguity. Thus, leaders seeking and responding to feedback from teachers on the burden of change implementation can improve staff adaptability (Kouzes & Posner, 2017; Miller, 2022). Miller (2022) notes the need for continuous climate monitoring strategies such as classroom observations, curriculum artifacts, and teacher surveys.

School vision connects the social complexities of the school climate to a morally worthy purpose (Pekarsky, 2007). Change outcomes should be linked to organizational programs, performance measures, objectives, and descriptions of progress (Wilson, 2003). Change agents and allies for change within the organization should be recognizable (Mendels, 2012; Zimmerman, 2006). Jackson (2020) notes the importance of teacher dialogue focused on defining individual roles within the school's vision to gain a better understanding of how the vision manifests within staff actions and attitudes. In short, the stakeholder experience of school climate should align with school vision (Blodget, 2022).

Section Three: Creating a Shared Vision

The process of creating a school vision is vital for effective school transformation and long term organizational coherence (Blanchard & Stoner, 2011; Kouzes & Posner, 2017; O'Connell et al., 2011; Simonarson, 2017). The literature suggests three best practices related to shared input towards the development of a school vision. Schools should begin by establishing a teaming structure for the visioning process. Establishing the structure is followed by the forming

and fostering of stakeholder partnerships, and finally the collection of the values, beliefs, and desired outcomes from all stakeholders. The process of creating a school vision is a long-term process that involves the contributions and buy-in of all school stakeholders (Bainbridge, 2007; Doten‑Snitker et al., 2021; Stewart et al., 2004). This section will outline these three best practices on which schools should capitalize for maximum impact.

Establishing Structure

The visioning process begins with creating a structure to allow for community input, partnership, and buy-in (Bainbridge, 2007; Bolman & Deal, 2017; Daly-Smith et al., 2020; Gurley et al., 2014; Kouzes & Pousner, 2017). Research suggests structures rely on teaming models that provide opportunities for shared engagement and contribution from all stakeholders (Long & Vickers-Koch, 1994; McTighe & Curtis, 2019; Pennisi, 2012). The most effective teaming structures for creating a school vision statement establish clear roles and responsibilities among all group members, institute group sharing protocols, and are grounded by strong group leadership.

Group Roles and Responsibilities. School vision teams are most productive when expectations have been established among all group members. Pennisi (2012) suggests that vision teams which are horizontally structured yield more comprehensive and well-thought out results. Similarly, Rodela and Bertrand (2021) note that top down team models are less conducive to group collaboration. Multiple researchers (Bainbridge, 2007; Gaspar, 2015) propose the establishment of roles for each group member. Properly structured teams unify group members in fruitful discussions that are group driven rather than leader directed (McTighe & Curtis, 2019; Pennisi, 2012).

Goals for group work must be established early on in the creation of a school vision process. Valenti and Kerr (2015) suggest that vision teams begin work with a short meeting to explain the visioning process. Bainbridge (2007) emphasizes that teams understand that creating a school vision statement is a long term process that takes time and effort for all team members. Researchers (Bainbridge, 2007; Gaspar, 2015) agree that teams need clear objectives for the process. Other scholars (Lattuch & Dankert, 2018; McTighe & Curtis, 2019) note the need to provide teams with examples of vision statements and starter resources to maximize group understanding of the work to be completed. According to Bainbridge (2007), at the early stages of visioning teams are not only developing understanding, but also generating enthusiasm for the process. Providing the group with clarity of the process as well as structured objectives maximizes the visioning effort.

Group Sharing Protocols. Supporting the visioning process requires the use of group sharing systems and supports. McTighe and Curtis (2019) suggest the use of collaborative tools such as Google documents, professional workshops, and online discussion boards which can provide ample opportunity and structure for team dialogue. Valenti and Kerr (2015) propose using a series of short meetings with agreed upon timelines for incorporating stakeholder voices, as well as sharing and analyzing data. Kouzes and Posner (1995) recommend starting the sharing process with reflection on both past experiences and future hopes for the school.

Creating structure for collaboration allows for equal opportunity among various stakeholders. Lattuch and Dankert (2018) found that elements of authenticity, focus, and shared experience are crucial for the successful development of a vision statement. To this end, Lencioni (2002) notes the establishment of group norms to allow for healthy group debate. Through the synthesis of diverse opinions, a powerful community vision is produced (McTighe & Curtis,

2019). It is vital that all stakeholders are represented in the final vision statement to reach consensus and buy-in (Bainbridge, 2007).

Group Leadership. Leadership is an essential component of the organizational structure to build vision (Pennisi, 2012). According to Long & Vickers-Koch (1994), leaders establish process stability by making their own purpose known to all stakeholders while also communicating their intent to fully involve people in the visioning process. McTighe and Curtis (2019) note that leadership must facilitate productive dialogue among constituents in order to help all stakeholders arrive at similar conclusions. Creating a new school vision statement requires that leadership be fully invested in the long term process and value all team members as equals (Kouzes & Posner, 2017; Long & Vickers-Koch, 1994).

Group leadership through the visioning process is characterized by traits of authenticity, resourcefulness, respect, and commitment (Bainbridge, 2007; Blanchard & Stoner, 2011; Kouzes & Posner, 2017; Lattuch & Dankert, 2018; Long & Vickers-Koch, 1994; Pennisi, 2012; Rodela & Bertrand, 2021; Simonarson, 2017). Simonarson (2017) notes that leaders who are honest and establish competence and trust build healthy relationships with all stakeholders. According to Lattuch and Dankert (2018), team leadership should be authentic and clear to manage team productivity. Furthermore, multiple researchers (Blanchard & Stoner, 2011; Bryk et al., 2017; Lattuch & Dankert, 2018; Kozlowski & Ilgen, 2006; Lencioni, 2002) outline the impact of leadership resourcefulness, tact, and commitment to manage the resistance and tension that will inevitably arise within the group dynamic. Rodela and Bertrand (2021) argue that leadership must be the influence. Similarly, Long and Vickers-Koch (1994) and Kouzes and Posner (2017) emphasize the importance of group leadership modeling the process and working within the group dynamic– not above it. Ultimately, it is up to group leadership to facilitate the visioning

process effectively as the process itself is the most vital component of creating a new vision statement (Pennisi, 2012).

Forming Partnerships

Shared vision is developed through community input, partnership, and buy-in (Bainbridge, 2007; Bolman & Deal, 2017; Daly-Smith et al., 2020; Gurley et al., 2014; Kouzes & Posner, 2017). A research study (Daly-Smith et al., 2020) of a U.K. school showed that system-wide school change was established by engaging mixed stakeholder groups in the drafting of a school-wide purpose framework. The perspectives and interpretations from various stakeholders across the broader community enrich the collective vision that emerges. (McTighe & Curtis, 2019). Moreover, the engagement of diverse perspectives foster process buy-in that is essential to creating an effective vision statement (Bainbridge, 2007; Doten‑Snitker et al., 2021; Pennisi, 2012).

Diverse Perspectives. The visioning process should elicit input from all school stakeholder groups including students, families, faculty, support staff, administrators, local politicians, and community members (Bainbridge, 2007; Pennisi, 2012; Rodela & Bertrand, 2021; Valenti & Kerr, 2015). The intentional inclusion of the most marginalized stakeholder groups diversify the vision perspective (Bainbridge, 2007; Rodela & Bertrand, 2021, Valenti & Kerr, 2015). Rodela & Bertrand (2021) suggest the use of accessibility tools and resources such as translators, multiple mediums of communication, simplification of language, and community favored venues. The authentic engagement of diverse stakeholder groups influences the longevity of the vision statement's power to impact school-wide change and coherence (Bainbridge, 2007; Rodela & Bertand, 2021).

Process Buy-in. The practice of forming and fostering stakeholder partnerships allows

different roles and interests to interact, fosters co-learning, nurtures innovative ideas, and cultivates ownership of the school vision (Daly-Smith et al., 2020; Franco-Trigo et al. 2019). A case study of two schools in Stockholm (Frelin & Grannäs, 2021) found evidence that effective vision statements evolve through partnerships characteristic of long-term stakeholder engagement in iterative learning cycles which align the vision to student learning and the school organization. In this study, process buy-in was achieved when stakeholder partnerships were formed through the exploration of individual stakeholders' experiences and cultivation of group education at each phase of the process. Gaspar (2015) suggests that allowing stakeholders to participate in the process aligns with both the individual and group need for a sense of control. Through the collaborative process, people are engaged in real dialogue with ample feedback opportunities (Blanchard & Stoner, 2011). Diverse groups of school stakeholders are collaborators that, through the vision process, are empowered to commit and own the process (Doten‑Snitker et al., 2021). A comprehensive shared school vision will develop when the organization as a whole engages in a large group collaborative process (O'Connell et al., 2011; Pennisi, 2012).

Collecting Values, Beliefs, and Desired Outcomes

The literature details a wealth of best practices for collecting values, beliefs, and desired outcomes from all groups of school stakeholders. Those practices of collection can be categorized into data informed practices, self-reflection strategies, and utilization of collective group strengths. This section details the literature on each method.

Data Informed Practices. Including as many stakeholder voices as possible within the visioning process often necessitates the use of data-informed practices such as interviews, focus groups, and surveys. These practices can allow the school vision team to gain data-informed

consensus from large and diverse stakeholder groups (Valenti & Kerr, 2015). Criswell et al. (2010) note the importance of interviewing people involved in the work of realizing the vision. Long and Vickers-Koch (1994) suggest using volunteer focus groups to review the vision statement, allowing the vision team to evaluate the intellectual and emotional response of the focus group. According to Gaspar (2015), an anonymous survey can be a valuable tool for analyzing the relationship between goals and objectives. Bainbridge (2007) stresses that the volume of data collection will increase with minimal time and effort from the stakeholders themselves. Through data-informed practices, vision teams can maximize and diversify stakeholder involvement.

Self-Reflection Strategies. Research is extensive on the value of reflective practices to uncover perspectives deeper than surface level (Ambrose, 1998; Criswell et al., 2010; Pennisi, 2012). Kouzes and Posner (1995) note the ability to look forward is enhanced by reflecting on past experiences. Reflective practice is a critical step in creating a vision statement (Kouzes & Posner, 1995; Lattuch & Dankert, 2018; Pennisi, 2012). The Collaborative for Academic, Social, and Emotional Caring (CASEL, 2019), a nationwide educational organization, outlines a reflective strategy for visioning which requires school faculty to discover and discuss their personal why as an impetus for imagining the future. Ambrose (1998) describes this practice as allowing stakeholders to get to the heart of physiological assumptions by capitalizing on metaphorical thought. Multiple researchers (Ambrose, 1998; Bainbridge, 2007; Criswell et al., 2010, Lattuch & Dankert, 2018) suggest the exploration of group values through workshop activities such as imaging, journaling, mind mapping, charts, tables, and graphic organizers as a practice for exploring new perspectives and ideas that are not alway obvious. Ambrose (1998) notes that these practices provide a frame of reference, as well as coherence to the process of

visioning. Bainbridge (2007) further suggests that reflective practices remind faculty of their purpose and provide opportunity to ground the school vision statement in the school's relationship with the students. To this end, self-reflection combined with group dialogue deepens the understanding of the purpose of the vision process which is vital to its success (Lattuch & Dankert, 2018, Pennisi, 2012).

Utilizing Collective Group Strengths. The school vision team must draw upon the experiences, strengths, and knowledge of the individual group members to decode information, analyze data, and provide relevance to the school community (Criswell et al., 2010; Gaspar, 2015; Kouzes & Posner, 2017; McTighe & Curtis, 2019). McTighe and Curtis (2019) refer to the vision team as the knowledge base. This knowledge base engages stakeholders in deep, rich, and collaborative dialogue to interpret community values, beliefs, and desired school outcomes (McTighe & Curtis, 2019). The vision team must draw on the expertise of individual members to persevere through the creative process (Blanchard & Stoner, 2011; Kouzes & Posner, 1995). Blanchard & Stoner (2011) note that creative tension will generate when the current reality is faced alongside the vision. Frelin & Grannäs (2021) allude to the notion that the school vision team should consider school practices such as co-teaching. Alternatively, Bryson and Anderson (2000) suggest the team focus more on the school barriers to overcome and what the future of the school will look like. Ultimately, it is through utilizing the collective group strengths that the school's vision becomes authentic to the stakeholder experience and beneficial to everyone it touches (Blanchard & Stoner, 2011; Lattuch & Dankert, 2018). The visioning process is a powerful tool when teaming structures are balanced with rich discourse, community investigation, and goal-oriented collaboration.

Section Four: Empowering School Transformation with School Vision

Our third question of the literature focused on the relationship between school vision and transformational change for schools. A high-quality, collaboratively constructed school vision statement can provide the catalyst for school-wide change. The best practices outlined in the previous section engages the entire community in the process of growth, as well as a shift to school-wide ethos (Brorström et al., 2022). Through this process, real transformation begins and long-term organizational coherence becomes possible (Blanchard, & Stoner, 2011). The literature suggests that school vision enables clear communication, motivation, and collaboration through the efforts of leadership.

Clear Communication

The vision statement communicates to all stakeholders not only the future aspirations of the school, but also the starting point for cohereing the school network of leadership, people, and circumstances (Kantabutra & Avery, 2010; Kurland et al., 2010; Mendels, 2012; Murphy & Torre, 2015). The fusion of all stakeholder voices into a singular purpose impacts change through consistent and clear communication (Blanchard & Stoner, 2011; McTighe & Curtis, 2019). Kouzes and Posner (1995) compare this fusion to placing all the puzzle pieces together and articulating the voices into a singular shared vision. The vision fosters communication between different systems and stakeholders (Blanchard & Stoner, 2011).

Clear and consistent communication is essential for school coherence. According to Cameron and Green (2020), communication needs to be crafted carefully to the right people at the right time. Different stakeholders within communities have varying needs, but communication needs to be continuous to increase confidence in the change process and to decrease false assumptions. School leaders that vary forms of communication engage educators

in meaningful actions, as well as empower teachers to transform through the school vision. (Zimmerman, 2006). Feedback to teachers is deliberate (Frese et al., 2003). But more precisely, communication of the school vision is clear and the vision itself is non-negotiable (Mendels, 2012).

Systematic and continuous communication keeps the vision alive beyond the visioning process. Long and Vickers-Koch (1994) suggest the system begins with posting the vision statement in numerous locations such as classrooms, the main office, meeting rooms, and the school website. Kouzes and Posner (1995) advise creating a short slogan for the vision statement to keep the vision alive within the organization's existence. Similarly, Blanchard and Stoner (2011) suggest condensing vision into a rally call to help people interpret events and changes in light of the vision. Such communication efforts are necessary to organize efforts, interpretations, and applications of all school activities (Brorström et al., 2022). According to Blanchard and Stoner (2011), communication around current events in relation to the vision allows stakeholders to understand how progress continues during adverse times and to stay committed. Consistent and strategic communication of the vision provides the school community with overarching purpose, daily direction, and long-term planning goals (Kose, 2011).

Motivation

Visionioning shifts the community mindset and empowers individuals to act (Brorström et al., 2022; O'Connell et al, 2011). A study of two Swedish cities showed that vision statements provide people with latitude for actions (Brorström et al., 2022). Stewart et al. (2004) suggest that the positive allure of change was due to the enhancement of community meaning through a vision for change. Through the visioning process, goals become meaningful and provide motivation for aligning stakeholders in change efforts (Murphy & Torre, 2015). Research shows

that stakeholders need to know for themselves how the organization functions, how community identity is formed, and how to align their own identity within the organization (Stewart et al., 2004). Vision creates synergy between communication and collaborative learning to leverage long term school change (Borda et al., 2018). In short, vision drives inspiration and creativity while setting the stage for the future (Kurland et al., 2010; Simonarson, 2017).

Collaboration

The vision is the glue that unites everyone in a common initiative (Kurland et al., 2010; Long & Vickers-Koch, 1994). According to Blanchard and Stoner (2011), the visioning process provides stakeholders a platform to invest their hopes and dreams and move quickly towards implementation. Similarly, Kurland et al. (2010) explain that vision rallies people into a joint effort to exert additional time and manpower to the organizational learning process aimed at improving school outcomes. A Swedish research study showed that vision spurred organization and created a platform for collaboration (Brorström et al,. 2022). Other researchers (Long & Vickers-Koch, 1994; Stewart et al., 2004) add to this idea that vision stimulates dialogue and builds community. Kotter (1996) explains that vision is an efficient way to coordinate the work of many stakeholders through a single anchor point. Ultimately, the vision is the tool for coordination and collaboration through long term change.

School vision is developed out of trusting and collaborative relationships among the school community. According to Kozlowski and Ilegan (2006), school staff must develop trusting relationships with leadership and one another. It is the school vision that provides people meaning for change (Kouzes & Posner, 2017). Educational researchers Kozlowski and Ilgen (2006) recognize that the development of interpersonal skills among individual team members can build trust for managing conflicts inherent to large culture shifts. Similarly, Bryk et al.

(2017) state the need to nurture social capital to cohere organizational culture through change. Hedges (2012) analogizes trust as a roadmap through change credibility, partnership reliability, workplace intimacy, and orientation of self within the change. Building trust among individuals strengthens the entire network as well as the conditions for change.

Numerous researchers cite the impact of employee and leader relationships upon change-efficacy (Bolman & Deal, 2017; Budhiraja, 2021; Kouzes & Posner, 2017; Ronen, 2018; Zimmerman, 2006). These organizational partnerships transpire through the conscious effort to engage all in a collective focus to innovate, improve, and value the process (Bryk et al., 2017). It is the cumulative effect of participation, interaction, and networking that sustains change (Millar et al., 2012).

Working together also improves student outcomes. A cross-case analysis of five New Zealand high schools examined the relationship between coordination, coherence, and student achievement. Researchers found that schools with high levels of stakeholder coordination were associated with high levels of student achievement when coordination was focused on clear and integrated school goals (Robinson et al., 2017). The cross-case analysis showed schools with great levels of improvement were led by principals who strategically addressed barriers through collective accountability of school faculty. Strategic leaders consistently return to the goal to establish daily routines and manage daily decision making.

Leading coherent change is about fostering relationships with constituents. Heifetz and Linsky (2017) note that relationships with allies are essential, however, employees often stuck in the middle are the ones that determine success. Strong leaders develop coherence through staff training aimed at effectively synchronizing both individual and group actions (Kozlowski & Ilgen, 2006). Strong leadership solicits involvement through dialogue. A qualitative study of

pre-service teachers and their principals found that teachers feel alienated and are less receptive to change when principals do not involve them in organizational problems (Ronen, 2018). Miller (2022) suggests eliciting parents, faculty, and student feedback to drive decision making. Conversations are a powerful tool to uncover the intricacies and subtleties of the truth (Blodget, 2022).

Ultimately, change-efficacy is achieved through a growth mindset of the people. A qualitative study of organizational managers showed the most influential factors of organizational change included the personal belief that change is needed, change can happen, change is organizationally beneficial, leadership is committed, and the belief that change is personally beneficial (Holt et al., 2007). A growth mindset is fostered through leadership.

Leadership

School leaders that inspire, listen, and foster relationships create school cultures more receptive to transformation and coherent within the transformative process. Leadership must engage in purposeful planning, communication, and decision making (Stevenson, 2021), instead of implementing one-time change initiatives. More importantly, school leaders should acknowledge the web of power–that is the intricate working relationships within various school departments as well as the interaction of those working relationships school-wide. Top down management is crucial, but middle management and micro level individual interactions are equally important in the internalization and adoption of the vision (Kouzes & Posner, 2017; Millar et al., 2012; Wilson, 2003).

School leaders that encourage, respect, support, and involve teachers in decision making generate enthusiasm and commitment (Kurland et al., 2010). Through formal and informal professional development, faculty need clarity about the purpose for change and motivation to

transform routine behaviors (Frese et al., 2003; Hedges, 2012). People want to see themselves in the realization of the transformation (Kouzes & Posner, 2017). A cross-sectional study of organizations across numerous industries found that visionary and emotionally inspirational leaders generate greater levels of organizational transformation (Groves, 2005). Leaders who can establish an emotional connection and foster intrinsic motivation cultivate conditions to combat resistance to change.

Conversely, negative perceptions and emotional disconnection damper transformation efforts. A cross-sectional study of a large Australian organization found that the planning of change is negatively associated with stress, employee attitudes, and job turn-over (Rafferty & Griffin, 2006). However, leaders that normalize organizational change through deliberation and planning significantly increase job satisfaction and decrease job turnover (Rafferty & Griffin, 2006). Leaders who focus on fostering tolerance for ambiguity have been shown to increase others' ability to cope with complex change (Ronen, 2018).

The vision statement provides school leadership with a compass. According to Kurland et al. (2010) leaders influence student learning by promoting the vision as a guide for organizational learning. The vision helps leadership illuminate the future and outline the necessary steps of long-term change (Blanchard & Stoner, 2011). Bryson and Anderson (2000) suggest that vision can give way to detailed action steps and timelines. However, Blanchard & Stoner (2011) emphasize that visioning is an ongoing process that will often need to be reset. Leadership should be committed to the vision and model it as a guide within school practices and everyday dialogue (Blanchard & Stoner, 2011; Kouzes & Posner, 2017).

A number of research studies investigated the relationship between vision, leadership, and organizational change. A qualitative study of school vision statements and the practices of

those principals who lead them showed that principals invested in the school vision used them as a guiding tool for teacher buy-in and long term change (Kose, 2011). Another research study of managerial and nonmanagerial personnel from four business organizations found that vision is significantly associated with readiness for change through the trust in leadership and the empowerment of employees to act (Haque et al., 2020). Similarly, a different study of elementary teachers at 104 schools in Israel revealed that vision, combined with a transformational leadership style yields the best results in organizational improvement (Kurland et al., 2010). The research suggests that when leaders effectively communicate vision, there are significant gains in job satisfaction, motivation, staff commitment, loyalty, clarity about the school's values, school pride, and organizational productivity (Kouzes & Posner, 1995).

Strong school leadership will help repair school fragmentation and cultivate school coherence. Strong leadership inspires employees and involves them in the development of transformative routines (Kouzes & Posner, 2017; Kurland et al., 2010). It is through close collaboration between school staff and leadership that commitment is generated (Groves, 2005; Kozlowski & Ilgen, 2006). It is also the clear messaging that fosters motivation and support for the school vision (Mendels, 2012; Zimmerman, 2006). Through strategic leadership actions around and beyond the generation of a collective vision, coherence is generated.

From Vision to Transformational Improvement

A vision statement can be a powerful impetus for transformation within an organization. It can be the guidepost from which all other systems operate. Blanchard and Stoner (2011) note that from the vision goals are set, support structures are built, and policies and procedures are aligned. The vision statement should be referred to every day in school operations such as staff meeting, internal email communications, family communications, school-wide initiatives, hiring

of new staff members, annual reviews, and community networking (CASEL, 2019; Long & Vickers-Koch, 1994). According to Bainbridge (2007), vision will lose its value if the principles are not practiced as part of everyday systems and structures. School strategy should align with vision and empower the people (Kantabutra & Avery, 2010). Figure 9 provides a visual representation of our synthesis of the role of a quality vision statement in creating the synergy for sustained improvement in school.

Figure 9: The Influence of a Vision Statement on School Improvement
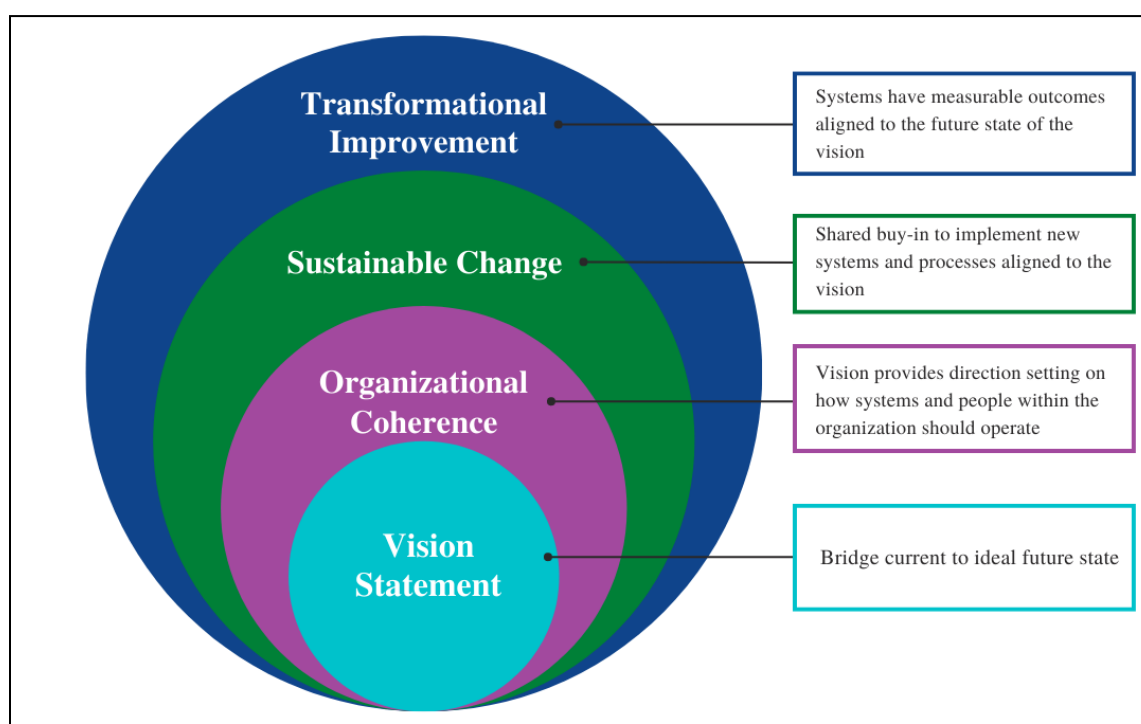
In this visual, the vision statement serves as the foundation from which all other conditions derive.

Chapter Summary

The literature clearly defines the school vision as the focal point for school change. This focal point aligns people, leadership, and circumstances to build organizational coherence. A

clear, shared vision can guide school leaders on how the school should prioritize the finite amount of time and resources available each day. Through structured, collaborative, and iterative processes, a vision statement can be inclusive of a wide range of stakeholder voices. In seeking broad input– trust, transparency, and ultimately community buy-in to implement the vision can be achieved. Creating conditions that foster the sharing of ideas and identifying the needs and hopes of various stakeholder groups can lead to the creation of a vision statement that authentically reflects the voice of the broader school community. At its best, the school vision is a lived experience.

Ultimately, a clear, shared vision contains aspects that set direction, define purpose, reflect an organization's values, and can be realistically attained. When successfully constructed and implemented, a vision sets the foundation for coherence across various systems in an organization. It is through setting a strong foundation that schools can implement sustained, aligned change.

The research presented in this literature review supports the Capstone Team's TOC for Shelburne Middle School. School vision is not only the why, but the how SMS can move forward on its journey to cohere the school's matrix of people, leadership, and circumstances. The visioning process should be well planned with structures that allow for partnerships among all school stakeholders. In the case of Shelburne Middle School, a visioning process and the resulting shared vision will foster the conditions to improve student academic achievement, increase community satisfaction, and enhance positive school behavior and management systems.

Chapter 3: Methodology

As highlighted in the first chapter, Shelburne Middle School is well on its way to address ongoing concerns of student discipline, student achievement, and teacher satisfaction through changes implemented in the 2022-2023 school year. As noted in our PoP, fragmentation within the school culture, stakeholders, systems, and structures contributed to the current challenges SMS faces. Existing literature shows that the creation of a shared, high quality vision statement can create a focus from which all other systems operate to reduce fragmentation within an organization. As explained in our TOC, implementation of a high quality school vision contributes to coherence to improve student achievement and school climate.

Purpose of the Study

The purpose of our study was to gather and analyze information from various stakeholders (students, parents, and staff) at SMS to inform the development of the school's shared vision. Our work was designed to complement the work of Principal Warren by extending her outreach in the Shelburne community to collect input and ideas for drafting a shared vision statement. We aimed to assist Principal Warren in this work by soliciting faculty-wide input, as well as that of families and students to help ensure that the culminating vision is inclusive of the voices of each of these stakeholder groups.

Through an interpretivist lens, we explored how students, staff, and parents make sense of their experiences at Shelburne Middle School. An interpretivist epistemology is essential to focus on the meaning stakeholders have made of their current experiences at SMS and their hopes for the future state of the school (Bhattacharya, 2017). Together, the work of this research team and the work Principal Warren fostered progress towards the community co-production of a school-wide vision which will serve as a focal point for system-wide change at Shelburne Middle

School.

Research Questions

  A vision statement serves as a bridge to move an organization from its current reality to an idealized, future state (Kotter, 1996). The Capstone Team endeavored to help SMS leadership include stakeholder [1] (student, staff, and parent) voice in the creation of a shared, collaborative vision statement by addressing the following broad research questions (RQs):

  RQ1: Understanding the current state. What are current issues or concerns stakeholders feel need to be addressed at SMS?

  RQ2: Providing direction for the future state. What values and academic priorities do stakeholders want SMS to prioritize?

  RQ3: Cultivating coherence for the future state. Once the vision is actualized, what outcomes do stakeholders want to experience?

Research Design

  The team utilized a convergent mixed-methods approach to address the research questions. Mixed methods research involves integrating both qualitative and quantitative data to gain a deeper and more comprehensive understanding than would be gained by using only qualitative or quantitative data alone (Cresswell & Cresswell, 2018). Data collection tools included document analysis and surveys.

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[1] We focused on the stakeholders most directly impacted in the daily operations of school including students, staff, and parents. We acknowledge that the definition we offered in chapter one also includes important voices of community and organizations. Due to time and feasibility restraints of our study, community and organizations input are not included.

Data Collection

Two different types of data were collected. The first type of data was an examination of

the principal's notes from individual discussions she had with 44 staff members to better

understand issues faculty stakeholders feel need to be addressed. The second type of data was

gathered through the distribution of a survey to stakeholder groups within Shelburne Middle

School to collect feedback from faculty, current students, and parents or guardians. Table 2 notes

the timeline and how each data collection type was mapped to our three research questions.

Table 2: Data Collection Mapped to Research Questions

Data Collection Mapped to Research Questions		
	Document Analysis Oct - Nov 2022	**Stakeholder Surveys Nov - Dec 2022**
Research Question 1 *What are current issues or concerns stakeholders feel need to be addressed at SMS?*	X	X
Research Question 2 *What values and academic priorities do stakeholders want SMS to prioritize?*		X
Research Question 3 *Once the vision is actualized, what outcomes do stakeholders want to experience?*		X

Document Analysis

In our initial meeting with the partner, the Capstone Team learned that Principal Warren

had offered to meet with every SMS staff member over the summer prior to the new school year.

A total of 44 individual staff stakeholder meetings were held. The focus of these meetings was

for Principal Warren to connect with her staff and to hear about concerns and the current state of

the school. Principal Warren agreed to share her handwritten notes from these meetings with the Capstone Team. Our analysis of the principal's notes from these meetings with staff helped us to answer the first research question focused on understanding the current needs and state of the school as framed by staff members.

We followed a process of sequential steps (Creswell & Creswell, 2018) to guide our analysis of the principal's notes. After reading the notes in full, we transcribed the hand-written notes into an electronic format to analyze with Dedoose, an online software program. We used Dedoose to code the documents for emerging themes to answer research question one. The team agreed upon a list of codes (see Appendix D) based on our understanding of community concerns from our site visit, our initial read of the notes, and initial meetings with the partners. We discussed each code together to ensure a shared understanding of the meaning of each and created a document outlining these understandings. Some excerpts were assigned more than one code as the excerpts overlapped into multiple code topics. As each team member coded, we also highlighted themes that did not fall into one of our existing codes. After we each coded the notes document individually to ensure intercoder agreement (Creswell & Creswell, 2018), we compared our results and discussed any discrepancies to agree upon a final, singular coded document. During our team discussion, we created additional codes for those items that the group agreed were important, but did not fall into an already agreed upon category as noted in Appendix D.

Ultimately, we created two broad categories: concerns about student learners and concerns with current operating systems to analyze Principal Warren's notes. Within these two broad categories, we created six codes for our process of reviewing the document (see Appendix D). In the first category, concerns about student learners, we analyzed the notes for comments

related to student behavior and student academic achievement. The second category, concerns with current operating systems, contained the remaining four codes of resource needs, classroom instruction, school morale, and communication. Key concepts addressed in the literature review including leadership, collaboration, and scheduling were coded within the context of the six broader categories. Chapter four provided further explanation of the categories.

After compiling the data, we identified which themes were most prevalent by noting which codes were most utilized in analyzing the notes. This information provided an indication of what issues staff perceived as most important to address in the current state of the school. We considered this information in the context of Shelburne's work to create a school vision and how it could relate to reducing current fragmentation within the school.

Survey

The Capstone Team received permission from the district leadership team to complete survey research with three distinct, but critical stakeholder groups- parents, staff, and students. A survey was developed by the Capstone Team to assess our three research questions. The survey focused on four main topics: identification of current concerns, desired academic outcomes, individually held values, and vision as a whole. These four topics map directly to our three research questions. The survey served to expand community outreach for the collection of parent, student, and staff voices in a shared vision. All three stakeholder groups received the same survey. We acknowledge the definition of stakeholders in chapter one also includes the important voices of community and organization, however, due to time and feasibility constraints, our study did not include their input.

The survey was composed of 33 multiple choice questions and three open-ended questions accessed through a Google form (see Appendix E). The multiple choice questions were

crafted for ordinal analysis while presenting respondents with clear and non-leading questions. Multiple choice questions targeted academic priorities and values that are most important to stakeholders and where SMS is aiming as a community. The three open-ended questions included free response questions to gather data to identify current concerns in the school, as well as to assess desired outcomes for the school vision statement. The open-ended prompts allowed respondents to provide detailed responses to the values or core beliefs wanted in the daily operation of Shelburne Middle School. Table 3 is an example of a multiple choice question and one of the open-ended questions from the survey.

Table 3: Sample Survey Questions

Sample Survey Questions	
Multiple Choice Example	Innovation to try new things 5 - this value is extremely important to me 4 - this value is important to me 3 - neutral- neither find this value important or unimportant 2 - this value is not important to include in the school's vision 1 - I do not understand this value
Open-ended Example	Please describe your vision for the future of students at Shelburne Middle School. You may include academic priorities you ranked as very important in questions 21-34. You may also include academic priorities you see as important that were not listed in questions 21-34.

After the survey was developed, we sent a draft to Principal Warren and the district leadership team for review and input prior to being shared to the stakeholder groups. We also distributed the survey to five individuals for a small pilot study to gather feedback about the length of the survey and the clarity of the questions. The Capstone Team made minor adjustments including clarifying instructions and reducing the estimated time to complete the survey based on feedback from both the district leadership team and the pilot study participants.

Survey Distribution

The team used tailored design (Dillman et al., 2014) by working closely with SMS to distribute the surveys in ways that would encourage maximum participation. Principal Warren introduced us and our work at the September 2022 faculty meeting we attended and provided the opportunity for staff to openly introduce themselves and share their ideas with us. While building positive social exchange was limited, we felt the site visit helped provide important context and connection for staff to engage in providing input.

Surveys were distributed to staff, students, and parents through familiar channels detailed in the next section. Participation was voluntary and survey responses were kept anonymous. The survey was available to all stakeholders for 21 days and designed to take participants approximately 12 minutes to complete. All surveys were framed as opportunities to provide information that would help identify current needs and improve the Shelburne school community. We provided the principal with communication materials to assist with the distribution of the survey (see Appendix F). Table 4 summarizes the survey distribution process to each stakeholder group.

Table 4: Survey Distribution Information

Survey Distribution Information				
Stakeholder Group	**Method of Distribution**	**Time Period for Response**	**Number Distributed**	**Response Rate**
Students	Weekly HERD Lesson	**3 weeks**	**570**	**22.5% (*n*=128)**
Parents	Principal Weekly Email	**3 weeks**	**691**	**2.75% (*n*=19)**
Staff	Principal Weekly Email	**3 weeks**	**67**	**38.81% (*n*=26)**

The parent and guardian survey was distributed through the principal's weekly email, as this is a channel that parents and guardians already know and trust. Our parent and guardian results reflected a 2.75% response rate. Faculty received the survey through the Sunday weekly faculty email by Principal Warren. The survey was included in her email for two different weeks. Prior to sending the survey the first time, Principal Warren discussed the survey's purpose in a faculty meeting. Our faculty results reflected a 38.81% response rate. Student surveys were administered during a morning HERD lesson which is a typical meeting time for students. Our student results reflected a 22.5% response rate. Stakeholders could access the survey either by clicking on the URL link to the Google form or through a QR code based on user preference. Students could access the survey through clicking on the URL link to the Google form. SMS provides computers to each student, making the URL link the most accessible mode to access the survey. Staunton City Public Schools (SCPS) does not permit student use of cell phones at the secondary level (grades 6-12) during the school day, limiting the functionality of the QR code for

student use.

Survey Data Analysis

The survey data was collected and analyzed on a shared Google Sheet that was analyzed by each member of the research team. Google spreadsheets allowed us to organize, clean, visualize, and examine raw data as a team. Detailed descriptive statistics were coded within the Google platform. Additionally, the texts of free response questions were transferable to separate Google spreadsheets for qualitative analysis.

Multiple choice questions were analyzed with descriptive statistics to identify trends in responses, which include frequency distributions, central tendencies, and data variability. Multiple choice questions which focus on nominal data collection invested trends in responses and provided demographic snapshots of stakeholders participating.

For open-ended questions, the team engaged in a coding process similar to the process followed in analyzing the principal's notes to identify emerging themes in the responses. We followed a process of sequential steps (Creswell & Creswell, 2018) to guide our analysis of the free-response data. After reading the answers in full, we uploaded the data to analyze with Dedoose, an online software program. We used Dedoose to code the documents for emerging themes related to stakeholders' ideal vision statements. For the first two free response questions which asked about stakeholder priorities for vision related to students and SMS as a community, the team agreed upon a list of codes (see Appendix G) based on our initial reading of the responses and our understanding of the SMS community. We created a new codebook for the first two free response questions as these questions focused on ideal outcomes while our first codebook focused on current community concerns. The broad range of stakeholder responses about desired outcomes necessitated a more detailed codebook. We discussed each code together

to ensure a shared understanding of the meaning of each and created a document outlining these understandings. Some excerpts were assigned more than one code as the excerpts overlapped into multiple code topics. As each team member coded, we also highlighted themes that did not fall into one of our existing codes. After we each coded the notes document individually to ensure intercoder agreement (Creswell & Creswell, 2018), we compared our results and discussed any discrepancies to agree upon a final singular coded document. During our team discussion, we created additional codes for those items that the group agreed were important, but did not fall into an already agreed upon category as noted in Appendix G.

Ultimately, we created ten codes within two broad categories for our process of reviewing the free response data related to stakeholder vision priorities. Our first category, vision priorities related to students, included the following six themes for coding: academic skills, 21st century skills, responsible citizenship, career ready, college ready, and wellness. Our second category, vision related to SMS, included the following four themes for coding: inclusive community, learning engagement, fairness/equity, and individuality/diversity/student choice. For the final free response question which asked stakeholders to identify one challenge they would like addressed at SMS, we used the same codebook (see Appendix D) that we used to code the principal's notes given that those notes also focused on current school challenges.

Limitations

Limitations of the study include those related to leadership changes, time, access to stakeholders, and willingness of stakeholders to share honest opinions. The first limitation was the shift in leadership at SMS during the submission of the RFA. The district office submitted an RFA in January 2022 and later hired a new administrative team for the middle school in late April 2022. While the new administrative team has been enthusiastic and open to working with

us, their availability to the Capstone Team and capacity for information-sharing was limited due to their workloads in new positions. As outlined in chapter one, these conditions limited the feasibility of addressing the scope of the original RFA. A limit to this study is that it does not address how the master schedule can be the lever to address student discipline, student achievement, and teacher satisfaction. Our study does, however, offer SMS with information from stakeholders on what they believe to be issues that need to be addressed to allow the learning community to work towards a better future.

Second, time and geographic constraints limited the Capstone Team's access to stakeholders. It would have been beneficial to spend more time observing the school and to have had more interactions with more stakeholders. We were able to observe teachers in a professional development meeting, but we did not get to observe daily interactions in the classroom or gather information from stakeholders directly through interviews.

Another limitation of the study was that we were only able to interact with students and parents or guardians via an email survey. Similarly, the administrative team was new to the community and working to build trust and credibility with stakeholders. Thus, since surveys were distributed by the school, it is possible that some stakeholders did not feel comfortable sharing honest opinions in survey responses. Other limits to responses included internet access, language, familiarity with completing online surveys, and time for families to complete the survey could impact the rates of participation. Additionally, during the 21 days the survey was open for responses, the Capstone Team could not reach SMS leadership to explore options to increase participation. We acknowledge the low response rates, especially among parents, as we did not reach the desired response rates of 50% across stakeholder groups. In particular, the low response rates indicated that the results are not representative of the stakeholder groups in the

community, especially the parents. Future research to improve response rates by better engaging stakeholders to solicit is warranted.

There are additional limitations with the survey. Our study included the voices of students, staff, and parent stakeholders. We acknowledge that the broader community and organizations play an important role in having a voice, but for the feasibility of our study, their input is not included. Additionally, we did not collect demographic information in the survey, so we are unable to explain or attribute some of our findings to demographic characteristics . Lastly, there were limitations to the document review. One limitation is the principal recorded interview notes from her own perspective and for her own use. She may not have captured the faculty and staff feedback verbatim. While we coded the notes documents for themes, it is possible that Principal Warren unintentionally noted some topics that faculty members mentioned, while not making note of other topics. Additionally, the Capstone Team was making sense of notes from a conversation that we did not have an opportunity to hear in full. It is possible that we could have misunderstood or misinterpreted aspects of Principal Warren's notes in our analysis.

Chapter Summary

Using a mixed-methods approach allowed the team to gain a better understanding of the complex system that all stakeholders are both operating in and influencing at Shelburne Middle School. Analysis of the principal's faculty interview notes provided us with a better understanding of the current needs that faculty stakeholders feel need to be addressed before engaging in work towards building an improved future. The stakeholder survey was informed by the site visit as it confirmed that staff stakeholders were unaware and unable to define or locate a school vision for SMS. The Capstone Team focused on synthesizing these two prongs to make

recommendations for how SMS can move forward to create a shared vision statement that will

guide the school forward with buy-in from all stakeholders to implement change.

Chapter Four: Data Analysis and Findings

While the initial PoP submitted by SMS leadership pointed to the master schedule as a system that needed to be updated, ultimately the Capstone Team identified the PoP as one related to school fragmentation and the need to align school systems, like the master schedule, with a clear, collaborative vision. As explained in chapter one, Principal Warren made changes to address some structural challenges when she began her tenure at SMS in the summer of 2022, including adjustments to the master schedule to address some existing school problems. However, the team noted an absence of a school vision that could act as an anchor for reimagining the master schedule and other SMS systems and programs in the future. Through the literature review in chapter two, we learned that effective processes of creating a school vision are long-term and shaped by the contributions and buy-in of all school stakeholders (Bainbridge, 2007; Doten‑Snitker et al., 2021; Stewart et al., 2004). The Capstone Team sought to support the new leader's efforts by exploring the responses of staff, parents, and students about what is important to each stakeholder in a new school vision. As outlined in chapter three, the mixed-methods approach was designed to solicit stakeholder input on the school's direction in order to enhance the ability for SMS leadership to move forward from short term to long-term improvements. This chapter details the findings from the team's analysis of the data.

The Capstone Team analyzed documents and survey results to answer three research questions. By answering these questions, we aimed to deepen understanding of the current concerns of SMS staff, parents, and students, find patterns among individual community members' hopes for the school, and tease out values and academic priorities from which the school visioning process can be cultivated. Findings in this chapter will be shared and organized by the guiding research questions.

Overall, we found in research question one that communication, student behavior and disciplinary responses, resource needs, and school morale are current school issues of interest to stakeholders. Findings that answer research question two showed that parents, students, and staff value quality education, equal opportunity for all, and believe that student academic success is cultivated through focus on three primary skills: effective communication, decision making, and critical thinking. To answer research question three, we found all three stakeholder groups shared the desire for an inclusive community that values individuality, diversity, and choice. Responsible citizenship and increased academic competence were the most desired outcomes for students. In the subsequent sections of this chapter, we will discuss each of these findings in more detail.

RQ1: Understanding the Current State

A vision statement serves as a bridge to move an organization from its current reality to an idealized, future state (Kotter, 1996). Before moving forward with a new school vision, there must be a clear understanding of the current state at SMS. Thus, research question one sought to provide greater understanding of what the larger community of SMS perceived about the current conditions in the schools: What are the current issues or concerns stakeholders feel need to be addressed at SMS?

Data related to research question one was gathered in two different ways. First, the principal's notes from her individual meetings with each faculty and staff member helped elucidate issues and concerns held by faculty and staff prior to the start of the 2022-2023 school year. Additionally, one free-response question on the SMS stakeholder survey asked: What is one issue or challenge would you like to see changed to make the experience at SMS better for all students?

Staff Concerns in the Current State from the Principal's Notes

We reviewed the handwritten notes Principal Warren recorded while meeting with 44 staff members, roughly 65% of the total staff, prior to the start of the 2022-2023 school year. The 44 staff members included teachers and staff members with roles both in and out of the classroom. In this section, staff includes both teachers and other school staff. We examined the notes to understand the issues and concerns staff felt needed to be addressed in the near term before deeper changes could be initiated. Following the data analysis protocols established in Chapter 3, we gathered 305 separate excerpts from Principal Warren's notes and then assigned each a code based on our code book (Appendix D). The frequency of the codes highlights which issues were most important to staff to address as the new principal began her tenure. Of the eight different category codes of concerns shared, the top three concerns were communication, student behavior, and resource needs. Table 5 further outlines the frequency of all principal denoted concerns among staff members interviewed. Each of the eight codes will be defined and discussed in this section.

Table 5: Concerns Highlighted by Staff in Principal Notes

Frequency of Staff Member Concerns Highlighted by Principal Notes in Spring 2022			
Staff concern as noted by principal	Number of excerpts	Percent of total excerpts	Percent of faculty/staff members who mentioned concern
Communication	66	21.6%	68.2%
Student Behavior	57	18.7%	72.7%
Resource Needs	57	18.7%	65.9%
School Morale	39	12.8%	50%
Classroom Instruction	36	11.8%	45.5%
Student Academic Achievement	27	8.9%	29.5%
Social Emotional Learning	20	6.6%	29.5%
Other	3	1%	6.8%

Communication. The communication code identified comments that note gaps in communication processes within the school organization. The principal's notes did not reflect any positive aspects related to communication. Deficiencies in communication were the most commonly mentioned problem in Principal Warren's notes. Staff members mentioned communication concerns 66 separate times by 30 of 44 staff members (68.2%). There were two main strands related to communication: first, breakdowns in two-way communication between administration and staff and second, communication related to student behavior or discipline. Comments related to the administration indicated that some teachers felt that administrators had not communicated consistently or clearly with staff. One teacher described the paradigm of communication from the administration to the staff as "horrific," while another staff member

expressed that staff felt there were barriers in receiving communication from the administration. The second strand of comments about communication related to problems with follow-up on student behavior and discipline incidents. Comments such as "no follow up with teacher or student consequences" and "discipline follow through, communication" point to the perception that administrators had not adequately kept staff members aware of how student discipline incidents were being addressed.

Student Behavior. Specific challenges regarding student behavior and disciplinary responses were coded as student behavior. Staff members mentioned student behavior in 57 separate excerpts by 32 of 44 (72.7%) staff members. Student behavior concerns were often paired with the communication concerns discussed in the previous section related to consequences and follow-up on student discipline. Other coded excerpts described concerning student behaviors such as students "cursing in the hallways" or "how kids speak to us are not okay." Finally, staff frequently mentioned the need for a consistent, school-wide discipline structure. One teacher shared, "we need discipline, boundaries," while another remarked that "discipline needs an overhaul." Faculty and staff shared an eagerness for "consistent rules and everyone follows," and "consistent rules for all grade levels."

Resource Needs. The code for resource needs identified comments that highlight concerns with supports needed in school. Staff mentioned resource needs in 57 excerpts by 29 of 44 (65.9%) staff members. The needs ranged widely in scale and scope, from expanding human resources to supplying tissues in the classroom. Five broad categories of needs emerged: physical plant, program, access, compensation, and personnel. Physical plant needs ranged from needs for a "door to limit kids between secretary" and concerns with the security "cameras not working," in addition to general supplies for the classroom and physical work spaces for instructional

assistants "to work with students." Program resource needs ranged from a desire to add programs like musical theater to multiple requests to bring back a program called the "focus room" in addition to requests for professional development opportunities and a drama production for students. Staff shared some access needs including "access to teacher gradebooks," as only one co-teacher can login to the class gradebook, limiting how teachers can work together and stay informed on student academic progress. An additional access need included a shared information system to "track discipline incidents." Compensation needs mainly centered on funds to attend meetings outside of typical work hours, including "expectations to stay for IEP, can we provide compensation." Finally, the personnel need referred to resources and attention to support teacher burnout and its impact on their capacities to serve student needs. One teacher noted she teaches 30 blocks and should only teach 25. Another specialist shared that students "didn't get the remediation they should, kids I wanted to remediate because I had to be in two places at once."

School Morale. The school morale code identified comments regarding concerns with the current morale within the school culture. School morale was mentioned in 39 separate excerpts by 22 of 44 (50%) staff members in their conversations with Principal Warren. Excerpts about school morale followed three themes: positive, ways to improve, and negative. "Team cohort works well" and "seventh grade team is a good team" are examples of positive school morale excerpts. Some staff expressed ideas about how to improve school morale such as "parent involvement in the school" and "multicultural festivities bringing community into the school." Other ideas were mentioned as well, like recognizing positive student behavior and offering more student voice and choice. Finally, some excerpts highlighted negative school morale. One longtime staff member noted, "morale is horrible" and adults are "not feeling heard." Staff described "adults are creating problems" and a need to "bridge gap between teachers not getting

along." Another faculty member pointed to apathy felt by students and difficulties motivating them.

Classroom Instruction. The classroom instruction code noted comments about concerns with instructional delivery and pedagogical practices. The team coded 36 separate excerpts about classroom instruction mentioned by 20 of 44 (45.5%) staff members in their conversations with Principal Warren. Excerpts can be sorted into four separate strands: instructional vision, remediation, honors courses, and substitute teaching systems. Comments about instructional delivery indicate that some teachers felt that an instructional vision has not been clearly articulated. One teacher shared, "can we focus on instruction next year?" and "how are we providing academics/teaching/learning?" Remediation was another frequently mentioned topic, with teachers pointing to a need for more remediation in addition to noting problems with the use in the 2022-2023 school year of a remediation class period called Excel. One teacher wondered, "what is our remediation plan?" and another noted that "kids didn't want to come to Excel." There was no consensus among teachers about the usefulness of Excel; another teacher mentioned "Excel everyday is good, but is a little much." Some comments noted difficulty accessing specialists for remediation, with one teacher noting, "SPED needs time to work with our kids" and another asking about how teachers can use interventionists. The third strand of classroom instruction topics, honors classes, were mentioned by multiple teachers. Currently, classes at SMS are heterogeneous. Teachers perceive some difficulties with this model, noting "honors kids are feeling frustrated with their peers." Another teacher described feeling like she does honors students a disservice because it is difficult to serve the wide range of student abilities in the same classroom. Finally, multiple teachers mentioned that the substitute teaching system and treatment of substitute teachers could be improved.

Student Achievement. The student achievement code represented comments related to concerns about student academic performance. We coded 27 separate excerpts mentioned by 13 of 44 (29.5%) staff members associated with student academic achievement. Excerpts coded for academic achievement centered on some of the same topics as classroom instruction, including ensuring students receive needed remediation or challenge, as well as wonderings about the effectiveness of the Excel program. Two teachers shared a desire for culminating projects to show and share student achievement. None of the staff notes mentioned concerns about overall performance on SOLs. Given what we know about the deficiencies revealed by the SOL data reviewed in chapter one, we found it notable that staff did not mention academic achievement as a more prevalent concern.

SEL. The SEL code identified comments that mentioned student social and emotional learning needs. The Capstone Team coded 20 separate excerpts mentioned by 13 of 44 (29.5%) staff members about social and emotional learning at SMS. Several themes emerged from the comments, including bolstering student recognition and student choice, motivating students, and considering recess. One teacher requested morning choice time for students, observing that there is "no time for social interaction for kids." Three teachers suggested adding recess to the school schedule. Multiple teachers identified limited opportunities for student voice and wondered about opportunities for a student council or student led announcements and music in the morning. Finally, multiple teachers identified the importance of developing systems for consistent, positive recognition of students. "Make sure to provide positive reinforcement" and "positive incentive work needs organization/consistency" reflect teacher desire to support students' social and emotional learning.

Equity. Three excerpts were coded as other. All three excerpts centered on the topic of race and equity. One of the comments clearly referred to equity in the discipline process. The other two excerpts did not give detail beyond identifying equity as a school concern. The Capstone Team noted disparities in SOL results among different student groups. Understanding equity concerns in more detail will be important for SMS to move forward.

Our review of the principal's notes revealed shared concerns staff had with the current state of operations at Shelburne Middle School. While the provided set of notes only captured short phrases and keywords, the coding of the notes revealed concerns related to communication, student behavior, resource needs, school morale, classroom instruction, SEL, and equity. Additionally, none of the staff interviewed mentioned concerns with the English SOL scores or student literacy. Overall, the current state as described by staff revealed a school with systems and teams operating independently of one another.

Survey Results

The survey completed in fall 2022 by school stakeholders also provided insight on the state of affairs at SMS, after the summer interviews and the opportunity for Principal Warren to implement some changes. One free-response question on the SMS stakeholder survey asked: What is one issue or challenge you would like to see changed to make the experience at SMS better for all students? Answers from this question shed light on the issues of interest to parents, students, and SMS staff.

Table 6: Concerns Highlighted in Survey Questions Free Response

Frequency of Concerns Highlighted in Survey Question Free Response			
Concern	Student number of excerpts (139 total)	Staff number of excerpts (53 total)	Parent number of excerpts (34 total)
Student Behavior	45 (32.4%)	10 (18.9%)	11 (32.4%)
Resource Needs	37 (26.6%)	10 (18.9%)	5 (14.7%)
Classroom Instruction	19 (13.7%)	6 (11.3%)	6 (17.6%)
School Morale	19 (13.7%)	5 (9.4%)	5 (14.7%)
Social Emotional Learning	9 (6.5%)	8 (15.1%)	1 (2.9%)
Student Academic Achievement	8 (5.8%)	6 (11.3%)	4 (11.8%)
Communication	1 (.7%)	3 (5.7%)	1 (2.9%)
Other	1 (.7%)	5 (9.4%)	1 (2.9%)

Parents. Of the 19 parents who responded to the survey, 17 parents responded to the free response question which asked about the issue or challenge the parent would most like to see changed. Eleven parent excerpts identified student behavior and disciplinary responses as the most important issue to be addressed at SMS. While student behavior was the most common response, the responses varied in terms of how the parents wanted the school to change the response to student behavior problems. One parent shared that the school should, "take the highest level of precautions in order to keep others, both students and staff, safe." Another parent shared that "suspension should only be used in extreme circumstances." Related to the concern with student behavior is the concern with school morale that five parents shared. These concerns

about school morale focused on fostering a cohesive community of mutual respect between students and adults. Responses coded as classroom instruction and academic achievement were related to parents requesting more specialized instruction for both advanced students and those who need additional support. Also included in the classroom instruction coded responses were two requests for increased professional development opportunities for teachers. Finally, parent responses coded as resource needs highlighted requests for student lockers and better management of bathroom cleanliness.

      Students. Of the 128 students who responded to the survey, 110 students provided substantive answers to the free response question which asked about the issue or challenge the student would most like to see changed. Coding the responses revealed the most student concerns were with student behavior and specific resource needs. Of the 45 excerpts coded for student behavior and disciplinary responses, seven specifically mentioned bullying and five mentioned difficulty with peers talking during class. Multiple students mentioned wanting students to respect teachers more. Of the 37 excerpts coded as expressing a resource need, 19 shared concerns with the bathrooms and bathroom pass system. The concerns about the bathrooms noted vandalism and bathroom closures. Many of these excerpts were double coded with student behavior as students expressed concerns about the behavior contributing to the closure of bathrooms and the lack of clean, safe bathrooms. Seven students expressed desires for a longer lunch period or better lunch options, and three students identified the need for more free time to socialize with peers. Concerns coded as related to school morale and classroom instructions each were identified 19 times. School morale concerns ranged from more time to spend with friends to increased club or team opportunities to equal opportunity and acceptance for all. One student shared, "I would like to see a more fair and friendly community. Some of the

kids here don't agree with some people's sexuality, gender, race or religion and are forcing it or bullying kids because of that." The 19 classroom instruction concerns ranged from a few requests for shorter classes, longer passing time between classes, fewer tests, less homework, and less stress. Nine excerpts expressed concerns related to SEL. Four students mentioned a desire for more concern about student mental health, and others voiced a desire for a friendlier, more sensitive community. Finally, eight students shared concerns about student academic achievement. These concerns elucidated student desire to "learn at their own level" and mentioned behavioral distractions getting in the way of learning.

Teachers and Staff Members. All but one of the 26 teachers and staff members who filled out the survey answered the free response question, which asked about the issue or challenge the teacher or staff member would most like to see changed. Ten teachers highlighted resource needs as a challenge to be addressed. Specifically, three teachers pointed to a need for lower teacher-student ratio or more adult resources to help support student needs. Three teachers also pointed to a need for students to have down time or social time, similar to student responses to the same question. Finally, two teachers mentioned more electives or clubs and buses to allow equal access to after school programming. Ten teachers pointed to student behavior as the most important challenge to be addressed at SMS. One teacher noted, "behaviors of 10% are limiting opportunities for 90%." While the principal's summer notes from the interviewed faculty tended to voice concern with student behavior and the communication systems between teachers and administrators around discipline, teachers and staff members in the fall survey focused on concerns about student behavior independent of administrator communication. This data suggests that Principal Warren had improved communication channels between teachers and administration since receiving summer staff input.

Even with this improved communication, however, student behavior remained a significant concern. Challenges with student behavior appeared to be linked with unmet student needs, reflected in excerpts coded as social emotional learning. Social emotional learning was coded across eight teacher responses. All eight responses focused on the need for students to have time to focus on developing skills like respect, responsibility, awareness of others, and connection with peers. Topics varied among the six responses coded as classroom instruction concerns. One commonality was the desire to find ways to engage students in their own learning. Variation was also present in the six teacher responses that were coded as representing academic achievement concerns. One teacher pointed to a need for honors classes to support learning, and another teacher wished that students would not be promoted to the next grade without meeting academic standards. Five teachers mentioned concerns related to school morale. Two new ideas that emerged in these responses were to emphasize school teams to develop connections and to rebuild a sense of community as a basis for all other positive changes. Finally, five responses were coded as focused on communication concerns. These concerns were largely focused on communication between school and parents. Teachers identified needs for parent communication, education, and involvement to support student learning and behavior.

Summary of Current Stakeholder Concerns

Analysis of the principal notes and survey questionnaire showed overlapping concerns across the two time periods and among the different stakeholder groups. Figure 10 summarizes the team's findings related to research question 1.

Figure 10: Current stakeholders concerns at SMS
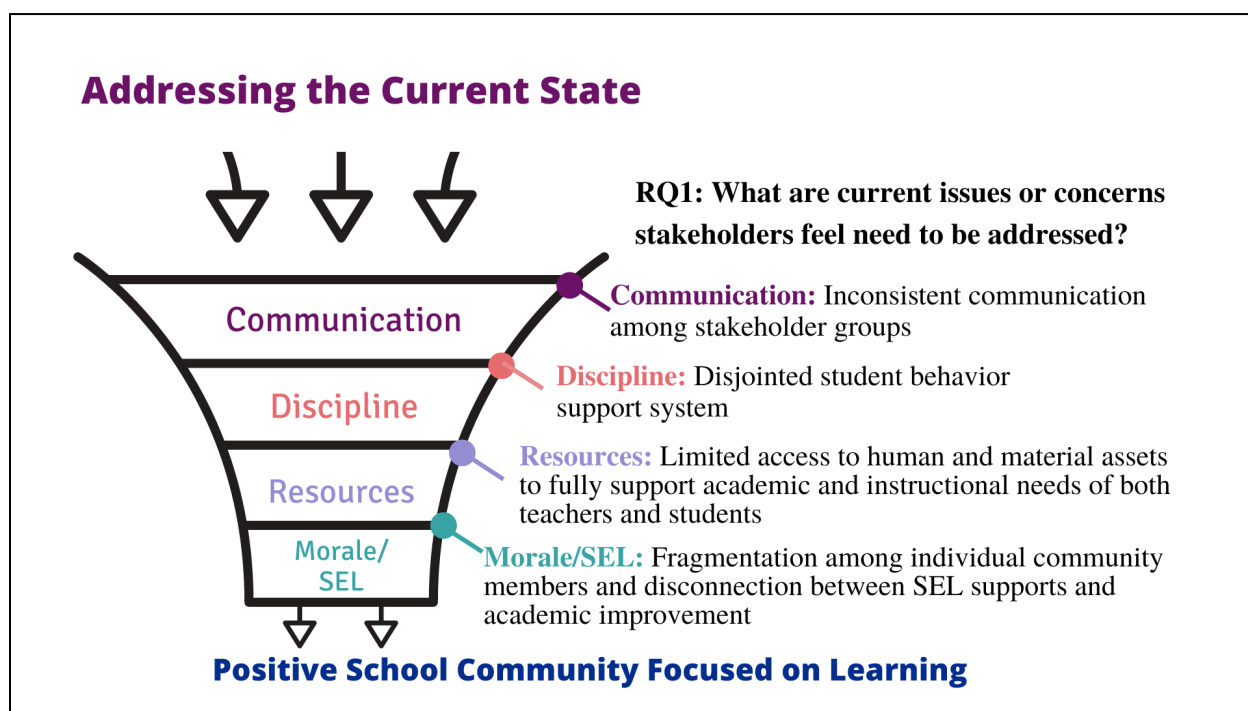
The principal notes showed that staff were concerned with inconsistent communication, student behavior issues, and resource needs prior to the 2022-2023 school year. The more recent survey results in November 2022 indicated that staff remained concerned with student behavior and resource needs. Of note, communication systems seemed improved for staff from the summer 2022 to November 2022 when the survey responses were captured. Similar to staff survey responses, parents noted concerns with student discipline and issues with resources to provide adequate safety and academic support for all students. Student survey responses also showed awareness that student behavior is impacting learning experiences. Likely linked to the significant concerns with student behavior were the perceptions across all stakeholder groups of poor school morale and limited emphasis on social-emotional learning. Stakeholder responses

across all three groups reflected an SMS experience in which student behavior is interfering with learning and positive school culture. Notably, numerous academic researchers (Anderson et. al, 2019; Muscott et. al., 2008; Perry & Morris, 2014) cite the significant association between student behavior supports and academic achievement. One empirical study of 28 K-12 schools in New Hampshire, showed that schools implementing a positive behavior intervention program with fidelity not only recovered 864 days of teaching and 1,701 days of learning, but also made significant improvements in student academic performance (Muscott et al., 2008). In light of the inequitable outcomes and academic achievement challenges revealed by SMS SOL data and the research on links between behavior and achievement, student behavior is a critical area of concern going forward.

Ultimately, the various concerns cited among stakeholders from both time periods and data sources can be simplified into four categories: communication, discipline, resources, and school morale/SEL. While communication was less frequently identified as a problem in the free response answers, it remained an area of focus. Student discipline was also rated among the highest concerns across stakeholder groups at both points in time of data collection. The various issues raised with student discipline allude to an incoherent school-wide support system for student behavior which impacts student achievement. Next, the broad spectrum of school resource concerns imply that capacity is limited by both human and material assets to fully support academic and instructional needs. Finally, concerns about school morale and SEL suggest a perceived need for building school community and integrating SEL supports to better support academic success. While communication, student behavior, resource needs, school morale, and SEL were identified as separate codes, results suggest the confluence of these issues

contributes to an SMS that must adapt and reimagine supports and programs in order to foster a positive school community focused on learning.

RQ2: Providing Direction for the Future State

The findings related to research question two delineated the school values and academic priorities stakeholders want SMS to prioritize. Examination of these findings also offer a potential direction for a new SMS vision statement. Research question two asked: What values and academic priorities do stakeholders want SMS to prioritize?

The stakeholder survey was used to gather data to answer research question two. Closed-ended survey questions asked participants to rank specific school values and academic priorities. Given a list of 16 school values and 14 academic priorities, respondents ranked the importance of each on a scale of 1 to 5 (see Appendix E). Table 7 provides the multiple choice answer scale used on the survey. To pinpoint school values and academic priorities ranked as most important, responses were averaged using the rating scale numeric values.

Table 7: Close-ended Survey Questions Ranking Scale

Multiple Choice Question Ranking Scale
5 = this value is extremely important to me
4 = this value is important to me
3 = neutral- neither find this value as important or unimportant
2 = this value is not important to the school's vision
1 = I do not understand this value

School Values

Stakeholders provided survey rankings on 16 school values: a just and fair community; cohesive school culture; collaborative decision making with faculty, parents, and school administrators; compassionate school culture; creativity; innovation; risk taking; equal opportunity for all students and staff; striving for excellence; growth mindset; inclusive school culture; building future leaders; promotions of lifelong learning; culture of community partnership; quality education; and student focused. Analysis was conducted on the proportion of low level ranking and high order rankings assigned for all of the school values. Only 2.4% of total survey responses assigned a ranking of 1, meaning the participant does not understand the value, to any of the 16 school values. About three percent (3.4%) of survey responses assigned a ranking of 2 or unimportant to any of the school values. Twenty-two point one percent (22.1%) of all responses assigned a neutral ranking of 3 to any of the school values, while 34.6% of responses assigned an important ranking of 4 and 37.4% of responses assigned a ranking of 5, or extremely important, to any of the school values. The large majority of assigned responses, approximately 72.0%, rated any given school value as important or very important. Figure 11 provides a snapshot of overall rankings assigned to the sixteen school values. Examination of the overall rankings of school values showed the community at large considered each of the sixteen school values as important.

Figure 11: Overall Ranking Responses Associated with the Surveyed School Values

Rankings of School Values

- 1 = I do not understand this value
- 2 = this value is not important to the school's vision
- 3 = neutral- neither find this value as important or unimportant
- 4 = this value is important to me
- 5 = this value is extremely important to me

37.4%

22.1%

34.6%
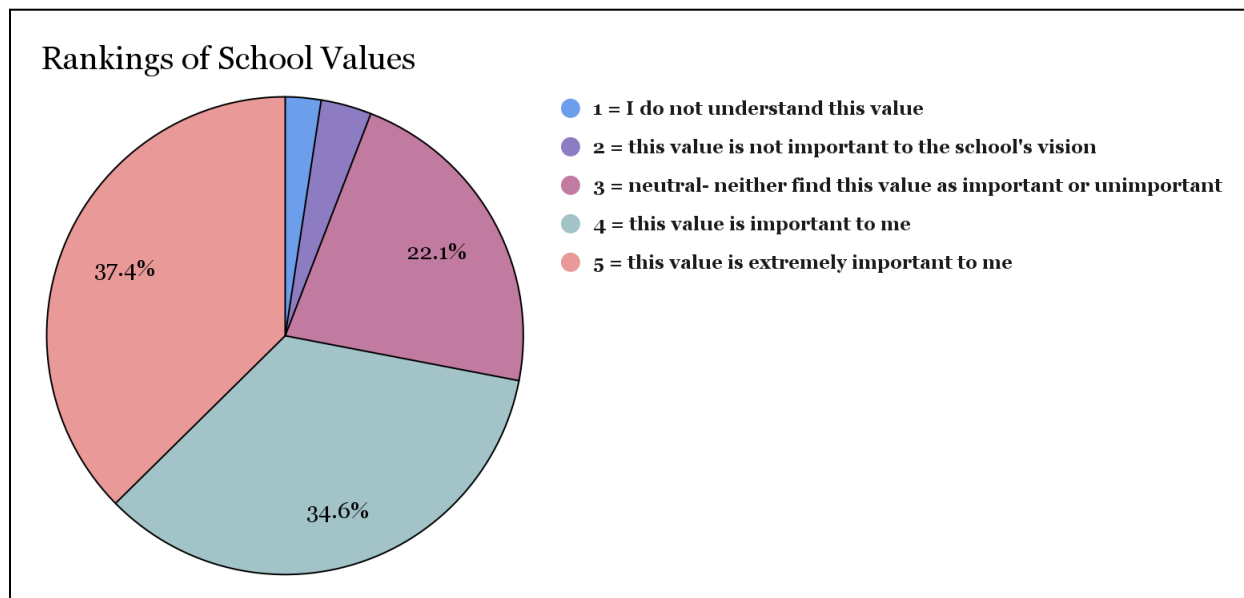
An analysis of the 16 school value rankings among each of the stakeholder groups revealed some similarities and differences. Appendix H outlines the average rankings of each school value. Parents and staff members ranked quality education as extremely important. Students, however, did not place such extreme importance on any one value. The average ranking for each value among parents was between a low of 3.5, for risk taking, to a high of 4.9 for a quality education. The average student ranking was between a low of 3.5 for risk taking to a high of 4.4 for equal opportunity. Staff members had an average low of 3.7 for cohesive school culture to a high of 4.7 for quality education.

Stakeholder groups ranked most values similarly, with average rankings falling between 3.7 and 4.8 for all 16 school values. The largest ranking difference was among the school values promotion of lifelong learning and growth mindset. Students ranked growth mindset at 3.9, while parents and staff ranked the values much higher at 4.5 and 4.8 respectively. Similarly, students

ranked promotion of lifelong learning at a neutral level of 3.6 compared to parents and staff placing higher importance on this school value at 4.6 and 4.7 respectively. Notably, growth mindset and promotion of lifelong learning are school values with long term outcomes. This suggests that students are prioritizing school values with short or near-term outcomes such as quality education and equal opportunity for all students and staff. Research on child brain development shows that adolescents are more likely to discount the value of delayed outcomes (Hartley & Somerville, 2015). Figure 12 shows the graphical comparison of these rankings for each of the sixteen school values provided on the survey.

Figure 12: Comparison of School Value Rankings Among Stakeholder Groups
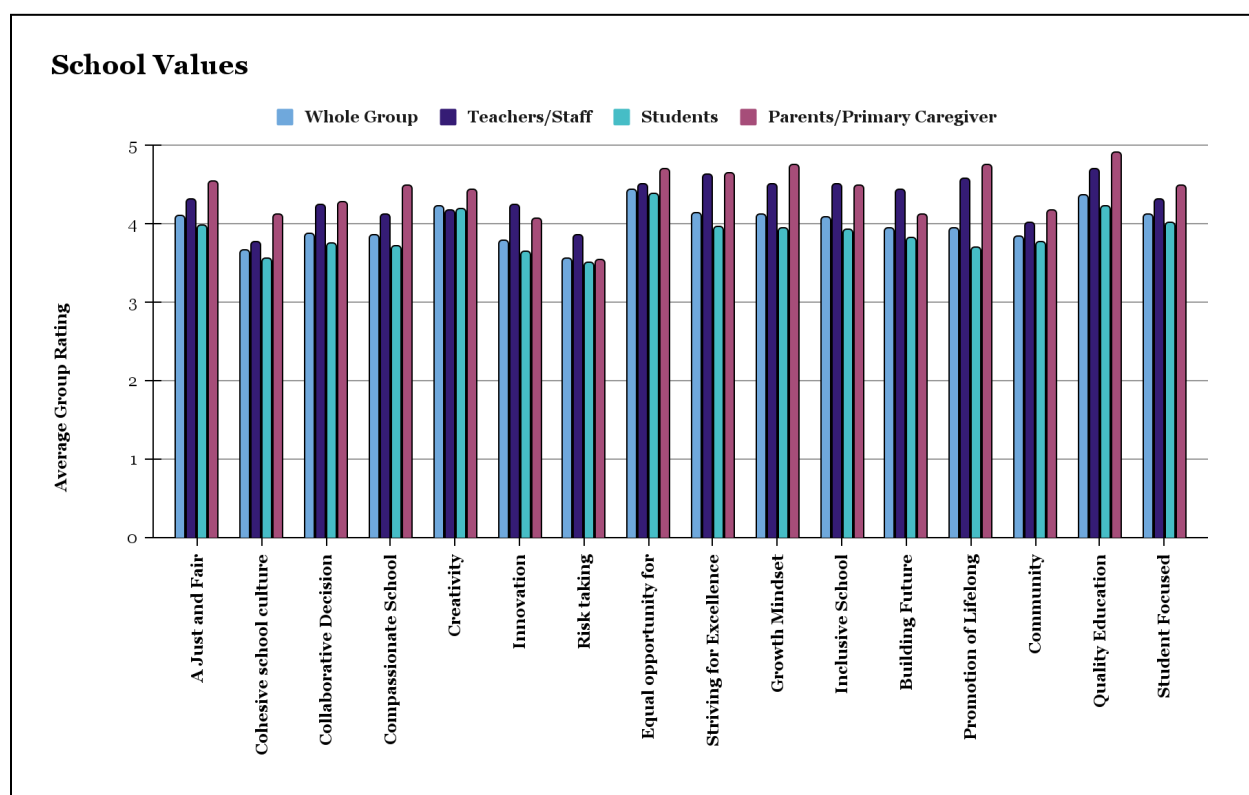
Ordering the individual school values for each of the groups highlighted values most and least important to each stakeholder group. Table 8 provides the school values for each of the

groups ordered from most to least important according to the average ranking calculated. Parents ranked quality education, growth mindset, and promotion of lifelong learning among the top three. Students ranked equal opportunity for all students and staff, quality education, and creativity as top three school values of importance. Staff members placed quality education, striving for excellence, and promotion of lifelong learning in the top three. Notably, among all three groups, the school value of quality education was ranked within the top two most important, and equal opportunity for all students and staff was ranked within the top four most important of all values. Additionally, risk taking and cohesive school culture were rated among the bottom three in order of importance among each group.

Table 8: School Value Rankings Ordered Among Stakeholder Groups

School Values Ranked from Most Important to Least Important			
Ranking	**Parents**	**Students**	**Staff**
1	Quality education	Equal opportunity for all students and staff	Quality education
2	Growth Mindset *	Quality education	Striving for excellence
3	Promotion of lifelong learning *	Creativity	Promotion of lifelong learning
4	Equal opportunity for all students and staff	Student focused	Equal opportunity for all students and staff §
5	Striving for excellence	A Just and Fair Community	Growth Mindset §
6	A Just and Fair Community	Striving for excellence	Inclusive school culture §
7	Compassionate school culture §	Growth Mindset	Building future leaders
8	Inclusive school culture §	Inclusive school culture	A Just and Fair Community *

9	Student focused §	Building future leaders	Student focused *
10	Creativity	Culture of community partnership	Innovation
11	Collaborative decision making with faculty, parents, and school administrators	Collaborative decision making with faculty, parents, and school administrators	Collaborative decision making with faculty, parents, and school administrators
12	Culture of community partnership	Compassionate school culture	Creativity
13	Cohesive school culture *	Promotion of lifelong learning	Compassionate school culture
14	Building future leaders *	Innovation	Culture of community partnership
15	Innovation	Cohesive school culture	Risk taking
16	Risk taking	Risk taking	Cohesive school culture

Note. Some category averages were tied among stakeholder groups. A two-way tie is denoted by * or a * and a three-way tie is denoted by §.

Academic Priorities

Stakeholders provided survey rankings on 14 academic priorities: critical thinking, effective communication, leadership skills, resilience, global awareness, collaborative skills, decision making, technology & digital literacy, STEM- science, technology, engineering, & math, citizenship, college readiness, career readiness, literacy, and study skills. Examination of these academic priorities revealed multiple academic priorities matter to stakeholders. Analysis was conducted on the proportion of low level ranking and high order rankings assigned for all of the academic priorities. Only 2.6% of survey responses indicated that the participant does not understand the priority (by assigning a 1 to any of the 14 academic priorities.) Three percent of survey responses assigned a ranking of 2 or unimportant to any of the academic priorities. Twenty point five percent (20.5%) of all responses assigned a neutral ranking of 3 to any of the

academic priorities. Moving to the rankings that indicated more importance to stakeholders, 35.9% of responses assigned an important ranking of 4 and 37.9% of responses assigned a ranking of 5 or extremely important to any of the academic priorities. Overall, 73.8% of responses rated any given academic priority as important or very important.

A breakdown of the fourteen academic priority rankings among each of the stakeholder groups revealed a more detailed comparison. Appendix I outlines the average rankings of each academic priority. The average ranking for each priority among parents was between a low of 3.6 for college readiness to a high of 4.8 for effective communication and literacy. The average student ranking was between a low of 3.6 for resilience to a high of 4.2 for career readiness. Staff members had an average low of 3.8 for college readiness to a high of 4.7 for critical thinking. The largest differences between rankings was resilience and literacy. Students ranked resilience neutrally at 3.5 while parents and faculty place importance on this academic priority with ranking of 4.3 and 4.7 respectively. Similarly, students ranked literacy at a neutral rank of 3.7 compared to an important ranking average from other stakeholder groups at 4.8 for parents and 4.7 for faculty. This disparity in rankings suggests student understanding of how resilience and literacy relate to their academic success may be limited compared to the beliefs of parent and faculty stakeholder groups. Additionally, college readiness was rated as one of the least important academic priorities with an average rank of less than 4.0 from each group. Figure 13 shows the graphical comparison of these rankings for each of the fourteen academic priorities provided on the survey.

Figure 13: Comparison of Academic Priority Rankings Among Stakeholder Groups
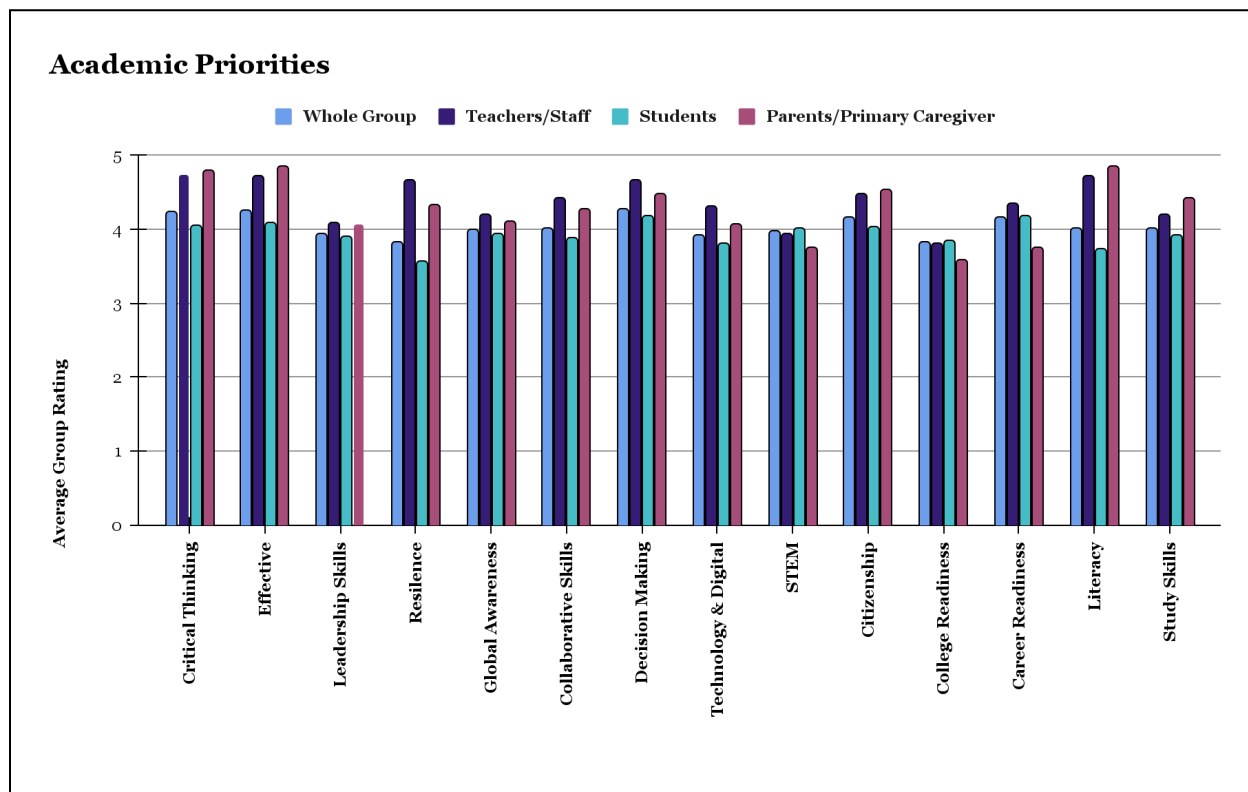
Academic priorities of most and least importance among each of the stakeholder groups were highlighted in Table 9 according to the average ranking calculated. Parents ranked effective communication, literacy, and critical thinking among the top three. Students ranked career readiness, decision making, and effective communication as top three school values of importance. Staff members placed critical thinking, effective communication, and literacy in the top three. Notably, among all three groups, four common academic priorities fell within the top five ranking. Each group ranked effective communication, critical thinking, decision making, and citizenship with an average rank 4.0 or higher. According to Carlgren (2013), students need these same skills to "function as a global citizen, operate effectively in post-secondary school, and be competitive in the global market" (para. 2). Table 9 provides a summary of the rankings by each stakeholder group.

Table 9: Academic Priority Rankings Ordered Among Stakeholder Groups

Academic Priorities Ranked from Most Important to Least Important			
Ranking	Parents	Students	Staff
1	Effective communication *	Career readiness	Critical thinking
2	Literacy *	Decision making	Effective communication *
3	Critical thinking	Effective communication	Literacy *
4	Citizenship	Critical thinking	Resilience *
5	Decision making	Citizenship	Decision making *
6	Study skills	STEM - Science, Technology, Engineering, & Mathematics based learning	Citizenship
7	Resilience	Global Awareness	Collaborative skills
8	Collaborative skills	Study skills	Career readiness
9	Global Awareness	Leadership skills	Technology & Digital literacy
10	Leadership skills *	Collaborative skills	Study skills
11	Technology & Digital literacy *	College readiness	Global Awareness
12	STEM - Science, Technology, Engineering, & Mathematics based learning *	Technology & Digital literacy	Leadership skills
13	Career readiness *	Literacy	STEM - Science, Technology, Engineering, & Mathematics based learning
14	College readiness	Resilience	College readiness

Note. Some category averages were tied among stakeholder groups. A two-way tie is denoted by * or * and a three-way tie is denoted by §.

The high ranking across stakeholder groups of effective communication, critical thinking, decision making, and citizenship suggests that all stakeholders value these as life-long, necessary skills to feel successful and to be able to positively function in the world outside of the classroom. These skills go beyond a particular content or grade level and are exercised and developed to build independent, well-functioning young adults.

Providing Direction for the Future State

To consider the core values and academic priorities that SMS stakeholders want the school to exemplify, the team conducted further analysis to consider the data holistically. . Through analysis of closed-ended survey questions, we determined the top five shared school values and academic priorities among stakeholders to provide a manageable starting point for SMS school visioning and organizational change. The five school values and academic priorities include quality education, equal opportunity for all students and staff, effective communication skills, critical thinking, and decision making. Figure 14 provides a representation of the core school values and academic priorities the Shelburne community wants to exemplify.

Figure 14: Providing Direction with School Values & Academic Priorities
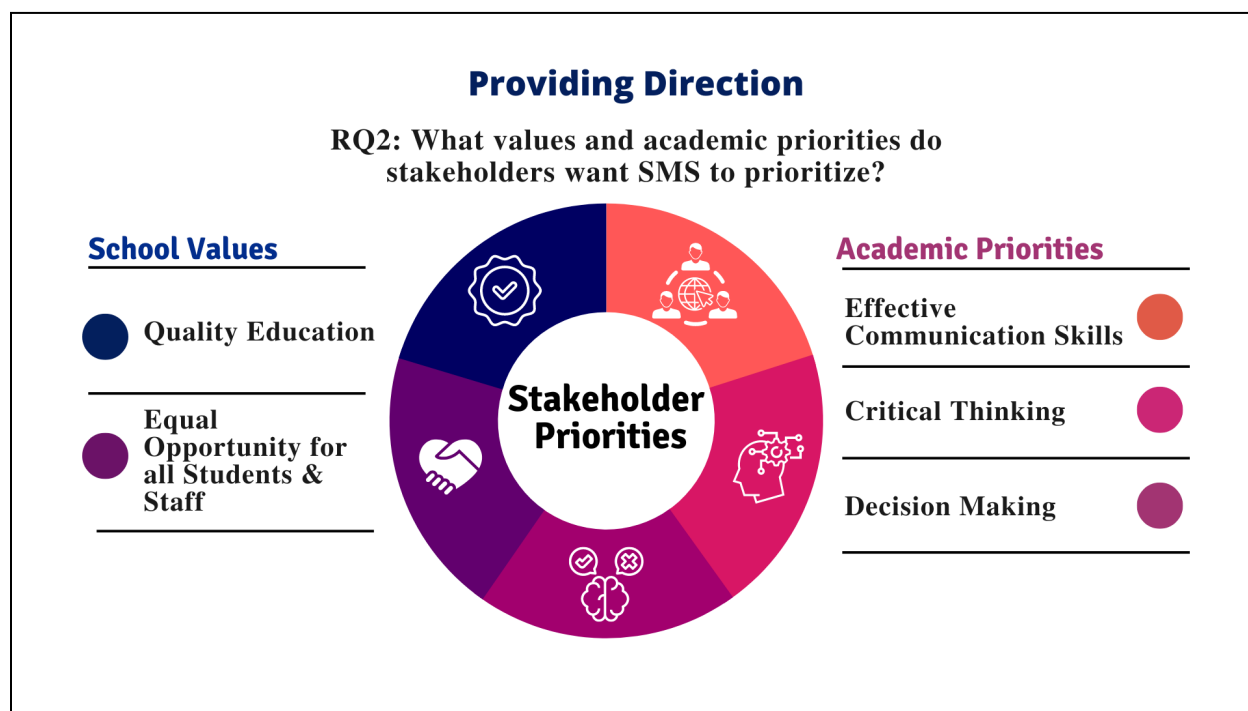
This suggests a school vision should be based upon the fundamental value of a quality education with equal opportunities for all. Further clarity about what comprises a quality education may be found in the additional stakeholder priorities of an education focused on fostering effective communication skills, critical thinking, and decision making opportunities. These collectively identified core values reflect the requisite skills to successfully navigate real world experiences.

RQ3: Cultivating Coherence for the Future State

We viewed stakeholders' sensemaking of coherence by first understanding their needs in the current state. However, we did not explicitly offer the term coherence to stakeholders. Stakeholders identified aspects of fragmentation within the school community in research question one by identifying unmet needs and concerns in the current state. Second, analysis of responses in research question two found common ground among stakeholders in the prioritization of shared academic priorities and values to include in a vision and provide a starting point to align instruction. Lastly, research question three provided stakeholders with the opportunity to identify outcomes once the vision is actualized. By finding commonalities among diverse stakeholders, data collected in response to RQ3 supported a future path away from the present fragmentation.

Because a vision statement can bring coherence to fragmented systems by serving as a bridge from the current to a more idealized future state (Kotter, 1996), research question three sought to elucidate the future outcomes that stakeholders want in their ideal experience at SMS. Gurley et al. (2014) state that the values implemented in the school setting should be able to answer the question, "based upon our core beliefs, how will we behave within our organization

in order to achieve our vision?" (p. 224). Research question three explored the intersection of the aspirational values and expected behaviors and actions. Research question three asked: once the vision is actualized, what outcomes do stakeholders want to experience? This question was answered through the analysis of two open-ended survey questions. Below are the two free response questions in the survey:

1. Please describe your vision of an ideal <u>Shelburne Middle School</u>. You may include values you ranked as very important in the previous section. You may also include values you see as important which were not listed in the previous section.

2. Please describe your vision for the future of <u>students</u> at Shelburne Middle School. You may include academic priorities you ranked as very important in the previous section. You may also include academic priorities you see as important that were not listed in the previous section.

This section outlines what was learned from analyzing these open-ended survey questions related to the outcomes stakeholders seek for the school and its students once the vision at SMS is actualized. As mentioned in the chapter three methodology, responses to these two questions were coded together, as many respondents included information about ideal students and school vision outcomes in response to both questions. The outcomes are classified into two broad categories: school culture and student experience.

Outcomes Sought for the Future SMS

Inclusive community and kindness, learning engagement, fairness and equity, and individuality, diversity, and student choice were commonly mentioned improvements

stakeholders seek for the school in the future. Appendix J outlines the frequency of each desired outcome mentioned by each stakeholder group in the open-ended questions. Figure 15 provides a graphical comparison of these desired impacts among each group. The discussion follows in the order of priority by stakeholders: inclusive community, individuality, learning engagement, and fairness.

Figure 15: Graphical Comparison of Vision Impacts to School Culture
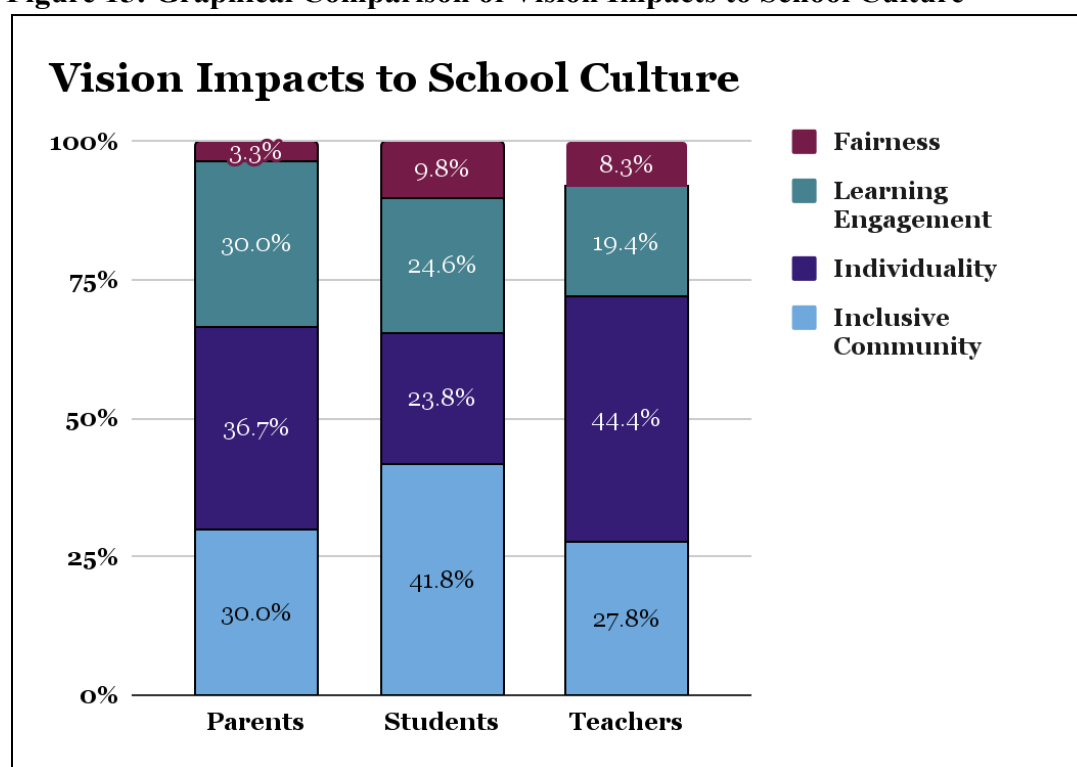
Inclusive community. The inclusive community code identified comments that highlighted the desire for a community centered on acceptance, togetherness, and caring. Inclusive community was the most mentioned vision outcome priority for students at 51 of 122 (41.8%) coded student responses. Inclusive community was also mentioned at similar rates by parents at 9 of 30 (30%) and closely followed by school staff at a rate of 10 of 36 (27.8%). One student shared, "My ideal Shelburne is a kind peaceful place. Where everybody is friends, and

people don't fight." Another student envisioned SMS as "a school full of kind, caring, and focused students and staff." Some students focused on a vision of SMS as a community without bullying or fights. Acceptance was defined by one student as a community where "no one is excluded" while another student described it as a place "where everyone is included and not left out." Another student further noted their hope for a "safe and inclusive space for disabled and LGBTQ+ kids," while another student expressed their desire for "more clubs/groups for minorities in the community (ex. a Black student union, a club for LGBT people in the school)." Lastly, several students aspired for Shelburne's culture to be collaborative and respectful between peers and school staff. One student explained their hope that the school culture will become a place that allows "everyone [to] grow in their own way and understand everyone has different learning strategies." Several students described the collaborative culture they are seeking with adults. One student described their hope that students can "speak their mind" while another student envisioned a future where "students and teachers can get along and be themselves." One student pointed to the hope that a future Shelburne fosters a culture with "collaborative decision making with faculty, parents, and school administrators."

Staff also prioritized more inclusive school culture. One staff member shared, "I would like more of an emphasis on treating people well/kindly/with respect." Several staff mentioned compassion as an ideal part of the SMS community, with one staff member describing a future outcome of stakeholders helping "others in need in this community." One staff member hoped to see a culture where "everyone feels safe and heard" while another staff member expanded this to include a culture that has an "attitude of inclusiveness of all people no matter their origin, sex, gender, or disabilities."

Parents echoed similar sentiments to those of both students and staff. One parent noted the need for a school culture where "students are kind to each other and to teachers while gaining an excellent education." Several parents placed emphasis on the interactions between school staff and students. One parent noted a hope for a school culture "that grows each student as a whole," while another parent expressed that "an ideal SMS would meet students where they are." One parent hoped to see staff that "fosters a sense of community." This sentiment was further expanded by a parent who hoped to see a collaborative culture where students are "encouraged and praised for their successes even if they are small." Another parent emphasized the important role of staff in helping students to "care about themselves and the world around them." Several parents also noted similar aspirations that students noted including zero tolerance for bullying, a learning community that exercises respect, and a culture where students "treat each other with kindness." Collectively, parents, staff, and students identified the themes of acceptance, togetherness, and caring as primary outcomes they are seeking once the vision is implemented.

Honoring individual needs. The code of individuality, diversity, and student choice noted comments that highlighted desire for a community that celebrates diversity and allows students to be themselves and choose their own paths. Student choice was expressed as choice in what and how students learn. The themes of individuality, diversity, and student choice were the vision outcomes most frequently mentioned in the open-ended responses across all stakeholder groups. Individuality, diversity and student choice responses were most prevalent among teacher responses and parent responses at 16 of 36 (44.4%) and 11 of 30 (36.7%), respectively. Students mentioned individuality, diversity, and student choice within 29 of 122 (23.8%) of their responses.

One staff member shared, "I believe Shelburne Middle School is a place where all students are encouraged and supported to be their authentic self." Other staff focused on the importance of recognizing the different backgrounds and experiences students bring to SMS and the importance of meeting the diverse needs of the students. Shelburne's student body is 59.8% White, 16.3% Black, 14.5% two or more, 6.8% Hispanic, 1.8% Asian, along with 46.5% of students who are economically disadvantaged, 12.8% are students with an individualized education plan (IEP), and 2.5% are identified as English language learners (ELL). Staff placed value on a future that leverages the individuality of each student in contributing to a more positive student experience. One staff member noted a school community where students "explore their identity as individuals while contributing to a safe and education-centered school environment." Another staff member sought an outcome where students "learn how to function as individuals (independence, self-reliance, initiative)" while another staff member indicated the value of individuality would drive the types of classes students can take to explore career, college, and hobbies.

Parents expressed this priority as a hope that SMS would "meet students where they are." One parent further expanded their hope of a community where "diverse identities and voices are respected." The emphasis on individuality was further explained by a parent as the opportunity for students to be "given the chance to live to their true potential in an environment that values their individuality." Additionally, another parent wanted to see a culture for students where they are able to "face and overcome challenges, and figure out who one is." This sentiment was further expanded by a parent who acknowledged that "students need the opportunity to be leaders and want to feel they are heard."

Students shared a desire for an SMS that values individuality and diversity through the opportunities and choices available for their learning. Students also mentioned a desire for more specialized courses to meet their needs and choices. One student imagined an SMS in which "everyone is included and we get options on how we learn and what we learn." Another student hoped for "more focus on discovering hobbies," while another student framed it as "having more elective time and less core class time." Both of these aspirations point to another student's hopes to have more activities "that involved jobs for when we get older." Another student defined the desire for the school to value individuality through the "including of students helping make school decisions." Students expressed their hope for a future community that embraces diversity and the individual. One student eloquently expressed the future outcomes of SMS as a "melting pot of different ideas and ways of thinking. A vision where our diversity is our biggest strength." Overall, parents, staff, and students alike emphasize individuality, diversity, and student choice as desired outcomes in the learning environment**.**

Learning Engagement. The learning engagement code identified comments that highlighted the characteristics of learning culture where students, staff, and teachers are eager to participate. All three stakeholder groups mentioned learning engagement, although each described it differently. Of student responses coded, 30 of 122 (25.6%) mentioned learning engagement. Students identified learning engagement in terms of an environment that offers the opportunity for both fun and focus. One student described an ideal SMS as "a school where students are excited to go to each class and find that their teachers have something fun and educating planned." Another student hoped to see a learning environment that celebrates students for "taking on challenges and getting rewards." Another student wanted to see student learners "take pride in their learning." Another student described a vision outcome of SMS as a school

"that can be focused but also friendly and funny at the right times." Multiple students describe the need for "having fun with learning" and to "make the teaching fun not boring." Overall, students expressed aspirations of a learning environment that engages them through the use of humor and fun.

Parent responses mentioned the theme of learning engagement at a rate of 9 out of 30 (30%). Parents focused on curiosity as an important outcome for SMS students. One parent shared a hope for an SMS that will "help students discover a curiosity for learning that they can apply to their lives and ambitions." Curiosity was further expanded by a parent to include "understanding how and where to seek knowledge." Another parent also stated the need for learning to include "fun, exploring/discovering" while another parent felt it important for staff to provide students with "room to grow" in the learning process. Lastly, one parent summarized the desire for a learning environment where teachers help students "connect learning with the pursuit– and attainment of– personal and professional passions."

Finally, staff mentioned learning engagement at a rate of 7 out of 36 (19.4%) and predominantly mentioned the desire for students to develop a love of learning. Several staff members expanded on the love of learning to include different pedagogical approaches. One staff member described it as providing "opportunities for all students to find their passion for learning" while another staff member noted pedagogical approaches to include "academic, artistic, and physical learning" in lesson design. Another staff member expressed the hope for a learning environment that celebrated teacher use of "virtual programming, mentorships, internships, genius hours, field trips, or bringing in a community member in that 'field' to help guide the student." All three stakeholder groups expressed aspirations for an improved, engaged

learning community through the implementation of the school vision. Students described engagement through fun, but did not provide additional explanation or examples to what fun meant. Parents define engagement through building student curiosity, or providing more interactive experience for students to ask questions and seek answers. Staff offered broader insight in offering both what they want for students and the means (strategies) by which to achieve a more engaged learning environment.

  Fairness and equity. The fairness and equity code pointed to comments that highlighted desire for equal access and opportunities for all students. Fairness and equity was identified as the fourth theme that emerged as an outcome stakeholders seek from an actualized vision for SMS. Fairness and equity as a theme was not mentioned as often as the other three themes. Student responses mentioned this theme with 12 of 122 (9.8%) responses. One student described equity as "everyone can learn equally," while another student noted it as behaviors of everyone to "work together to promote equality. Two students shared "a just and fair community" as the outcomes they are seeking but did not offer further explanation. Staff responses mentioned fairness and equity at a rate of 3 out 36 (8.3%) responses and with variance in how they perceive these outcomes for students. One staff member defined the idealized outcome as "all stakeholders will have access to resources needed to positively participate in this process and create a greater learning community." Conversely, another staff member noted, "equality of opportunity doesn't guarantee equality of outcome. Stop short-changing the high achievers!" Parents only alluded to this theme within 1 of 30 (3.3%) of their responses. One parent framed the desired outcome as "students who need additional support for learning get the support they need, and where students who need additional challenge have opportunities to be challenged." When fairness and equity was mentioned, stakeholders did not give as much detail as to what

fairness and equity actually means to them. Most responses simply identified fair treatment and access to the same opportunities as outcomes they are seeking through the implementation of a vision.

Vision Impacts to the SMS Student Experience

In this final section, we found outcomes or aspirations stakeholders are seeking for the SMS student experience. Team analysis of the responses noted stakeholders seek outcomes where students develop academic competencies, develop 21st century skills, and are college and career ready. Additionally, stakeholders expressed a hope for students who are supported in their well-being and are guided to become responsible citizens. Appendix K outlines the frequency that each student outcome was mentioned by each stakeholder group. Figure 16 provides a graphical comparison of these student-focused outcomes among each group. The discussion follows in the order of priority by stakeholders: responsible citizenship, academic competence, 21st century skills, career ready, college ready, and wellness.

Figure 16: Graphical Comparison of Student Outcomes of the Vision Statement
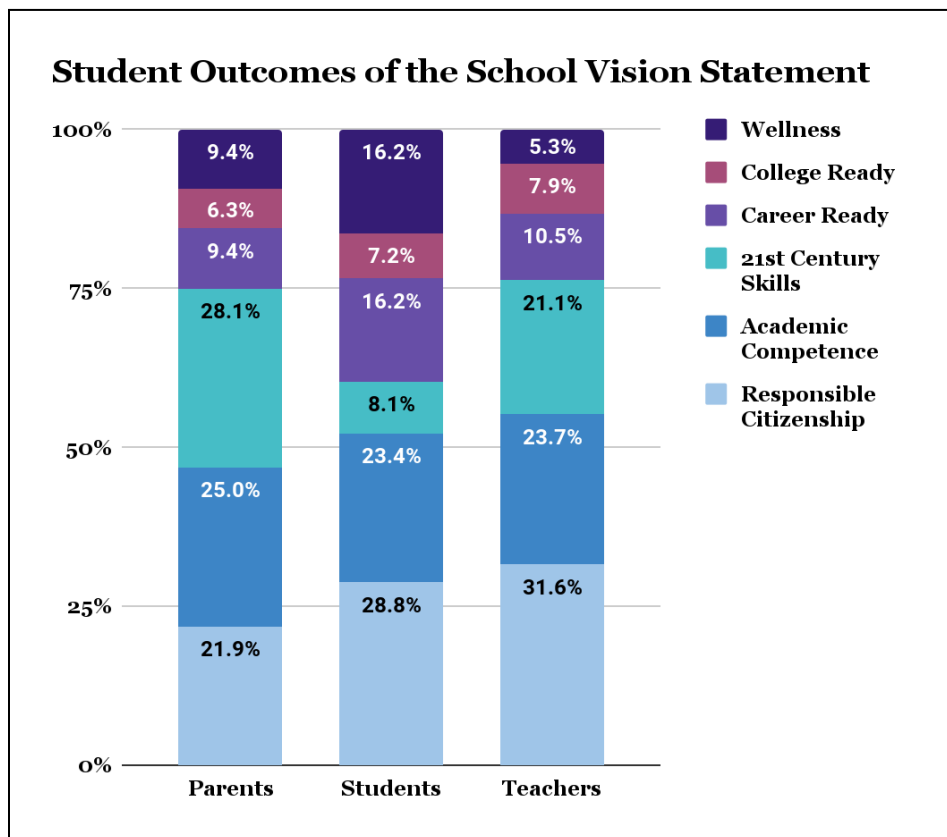
Responsible Citizenship. Responses coded as responsible citizenship focused on

students' good behavior and contribution to the community. Responsible citizenship was

identified as the most frequent individual student outcome by both students and teachers at a rate

of 32 out of 111 (28.8%) and 12 of 38 (31.6%) of each group's responses respectively. This

theme was also mentioned in 7 of 32 (21.9%) of all parent coded responses. For students,

responsible citizenship focused mainly on good school behavior. "My vision for future students

is to respect their teachers and fellow peers without having to be constantly supervised." Another

student aspires for "a strict but rewarding environment to form a responsible, respectful, and

collaborative future for all students" while another student seeks an outcome where they "grow

up to be good hard working citizens and to be respectable." Other students focused on becoming

responsible adults and community members. One student shared, "I wish for the kids at Shelburne Middle School to grow up to be good hard working citizens and to be respectable." Teacher responses coded in this category focused less on behavior and more on helping students to be contributing members of future communities. One teacher explained that a priority for students is to "learn the importance of civic duties, of being responsible for themselves, to learn the importance of giving of their time, talents and knowledge to help others in need in this community and beyond." Parent responses focused on respect and responsibility as priorities. Findings from research question one pointed to concerns with the current behaviors students are exhibiting such as the way students speak to teachers and the use of profanity in the hallway. Findings in research question two further illuminated concerning student behaviors in how students are treating their peers and vandalizing student restrooms. Stakeholder responses in research question three related to responsible citizenship seek outcomes where respect, and responsible student citizenship are evident and may offer a path forward for SMS to address current problematic student behaviors.

Academic competencies. Academic competencies, defined as responses related to specific content knowledge, were mentioned by all three stakeholder groups as important in the outcomes desired for Shelburne students. Academic competencies were mentioned among 8 of 32 (25%) of parent responses, 26 out of 111 (23.4%) of student responses, and 9 of 38 (23.7%) of teacher responses. Parents prioritized academic competencies for students in the open-ended survey questions pointing to the importance of "a quality education" and "academic mastery." The students themselves described academic skills as a desire for "good grades" or "growing knowledge." Students also used words like smart and intelligent in their descriptions of a vision of an SMS student. Teachers focused on the importance of students mastering basic skills at

SMS. One teacher noted that students "should be reading and writing on grade level before they are promoted to the next grade level." Other teachers agreed that a vision of SMS students should include understanding of basic academic skills in different content areas.

Focus on 21st century skills. Stakeholders also emphasized 21st century skills for students. The 21st century skills code identified responses related to critical thinking, problem solving, collaboration, and leadership. Parents identified this theme most at a rate of 9 out of 32 (28.1%) of all their coded responses. Teachers mentioned this theme at a rate of 8 out of 38 (21.1%), while students only identified the importance of 21st century skills within 9 of 111 (8.1%) of responses. Students identified skills such as leadership and communication as priorities for a vision of SMS students. One student expressed an outcome where the school focused on "critical thinking and mental patterns," while another student added wanting to "see students as leaders with strong creative mindsets." Another student summarized the ideal as students building their "critical thinking, study skills, and leadership skills." Teachers noted problem solving and critical thinking as skills that students should experience. One teacher noted an outcome in which students leave SMS with skills related to "problem solving, critical thinking, evaluating information, perseverance, and real world skills." Another teacher framed it as students having developed a "versatile set of social, academic, and technical skills in order to be successful and engaged citizens of the 21st century community." Parents pointed to leadership, work ethic, and resiliency as ideals for SMS students. One parent described an outcome where students leave SMS having developed "leadership and decision making skills to help them in the career path they choose." Another parent sought an outcome where students have the "opportunity to be leaders." All three stakeholder groups sought outcomes that prepare students for life beyond middle school that foster independence, leadership, and necessary life-skills.

Career and college readiness. Career and college readiness were codes with low frequency in comparison to other outcomes identified within survey responses. Parents identified career ready at a rate of 3 out of 32 (9.4%) and college ready at a rate of 2 out of 32 (6.3%). Teachers mentioned career ready within 4 of 38 (10.5%) of their responses and college ready within 3 of 38 (7.9%) of their responses. Parents and teachers mentioned career and college readiness to ensure opportunities at SMS for students to prepare for whatever path they choose. The largest difference in frequency of these codes was among student responses. Students identified the importance of college ready at a rate of 8 out of 111 (7.2%) compared with the identification of career ready at a rate of 18 out of 111 (16.2%). Students pointed to an ideal of an SMS student who is able to engage in activities that would prepare them for a job after graduation. Students focused on having the skills to be financially independent and to find a job they enjoy. One student shared a hope that "every student will be able to have any job they want and can learn alot of things." Those students who focused on college readiness in their responses pointed to getting into a good college and having the necessary skills to succeed as priorities.

The top stakeholder priorities in research questions two and three may help SMS define an instructional path to address concerns discussed in research question one regarding student learning engagement. Overall, in research question three, there is alignment among stakeholders in the academic outcomes they are seeking for students by emphasizing academic competencies, 21st century skills, and learning experiences focused on building career and college readiness. Findings from research question two also point to possibilities to bolster student engagement in the classroom. In research question two, stakeholders collectively expressed prioritizing the skills of effective communication, critical thinking, and decision making in the education experience for students.

Student Wellness. Finally, emphasis on student wellness was mentioned as an essential outcome. This code was only mentioned among parent and staff responses at a rate of 3 out of 32 (9.4%) and 2 out of 38 (5.4%), respectively. Student identification of this code was higher at a rate of 18 out of 111 (16.2%). The differences in response rates to this aspect may be based on the user's experience. In other words, this aspect most directly impacts students, so it would make sense that students would be more likely to discuss this in their answers.

School staff pointed to outcomes that meet "the social needs of students." One staff member noted that middle school aged students need time to "find their way in their social aspect" and also went on to advocate for a "safe, unstructured time in their day to feed and grow" the social aspect of their development. Students echoed a similar need for various structures like study hall, recess, or longer lunch periods to allow for more social interaction or less stress. As one student noted, "we're also all going through puberty so that makes middle school extra miserable." Building in "time to hang with friends" or to have recess or "some time to chill" or a "2 minute break before each class" were all suggestions from different students to address social and emotional needs. One student hoped for an outcome where students could use break times to have "a social life without causing disruption," while another student asked for a designated time to "hang out with friends." Some students directly mentioned more mental health focus and support in the school. One student simply shared a vision of SMS students who are "calm and happy students, with time to hang out with friends." Parents echoed similar sentiments of the need for holistic treatment of student needs. One parent valued supporting "the whole student and faculty, including emotional, physical, and mental health." Another parent advocated for students to be "given more practice with social skills," while another parent wants Shelburne to create opportunities for students to strengthen their skill development, including in "health and

wellness." Though at varying levels of frequency, all three stakeholder groups named improved student wellness and social skills as desired outcomes. Findings from research question one also noted the need from staff to provide students with a break time for students to socially connect with peers and reduce unwanted behaviors during class time.

Defining the Future Outcomes for SMS

The investigation of open-ended survey questions provided detailed insights about the outcomes stakeholders seek in the future SMS. To consider the school and student outcomes SMS stakeholders find most important, all coded themes were averaged to compute a weighted score. Equal consideration and weight was given to each stakeholder group. The weighted score was calculated by averaging the percentage of total response for each stakeholder group among each coded theme. Table 10 shows the weighted percentages scores for all coded school and student vision outcome priorities.

Table 10: Weighted % Scores of all Desired Outcomes from Vision Implementation

Weighted % Scores of Desired Outcomes from Vision Implementation			
School		**Student**	
Individuality, Diversity, & Student Choice	34.9	Responsible Citizenship	27.4
Inclusive Community	33.1	Academic Competence	24.0
Learning Engagement	24.6	21st Century Skills	19.1
Fairness and Equity	7.2	Career Ready	12.0
		Wellness	10.3
		College Ready	7.1

Comparing the outcomes stakeholders seek through implementation of a school vision shows that SMS stakeholders imagine an inclusive, caring community that celebrates diversity, meets students where they are, and offers options and opportunities for students. Figure 17 provides a graphical comparison of these weighted scores, with school priorities illustrated in blue. The weighted average of survey responses identifying the importance of individuality, diversity, and students choices was the highest outcome stakeholders want at approximately 35%. Inclusive community had a weighted average 33.1% among the SMS community. Learning engagement had an outcome priority weight of 24.7%, and fairness and equity had a weighted score of 7.1%. Importantly, even though learning engagement and fairness and equity are the lower ranked values, these outcomes should still be interpreted as high priorities for stakeholders as these responses were open ended and generated independently in the responses.

Examination of the weighted scores for student outcome priorities (illustrated in purple on Figure 17) showed a larger community draw towards responsible citizenship and academic competencies. Among the six codes for student outcome priorities, responsible citizenship had a weighted score of 27.4%. The weighted score for academic competencies closely followed at approximately 24.0%. Twenty-first century skills, a closely related theme, was weighted at 20.1%. Codes of wellness, college ready, and career ready only had weighted scores of 10.3%, 7.1%, and 12.0%, respectively.

Figure 17: Graphical Comparison of Desired Outcomes from Vision Implementation
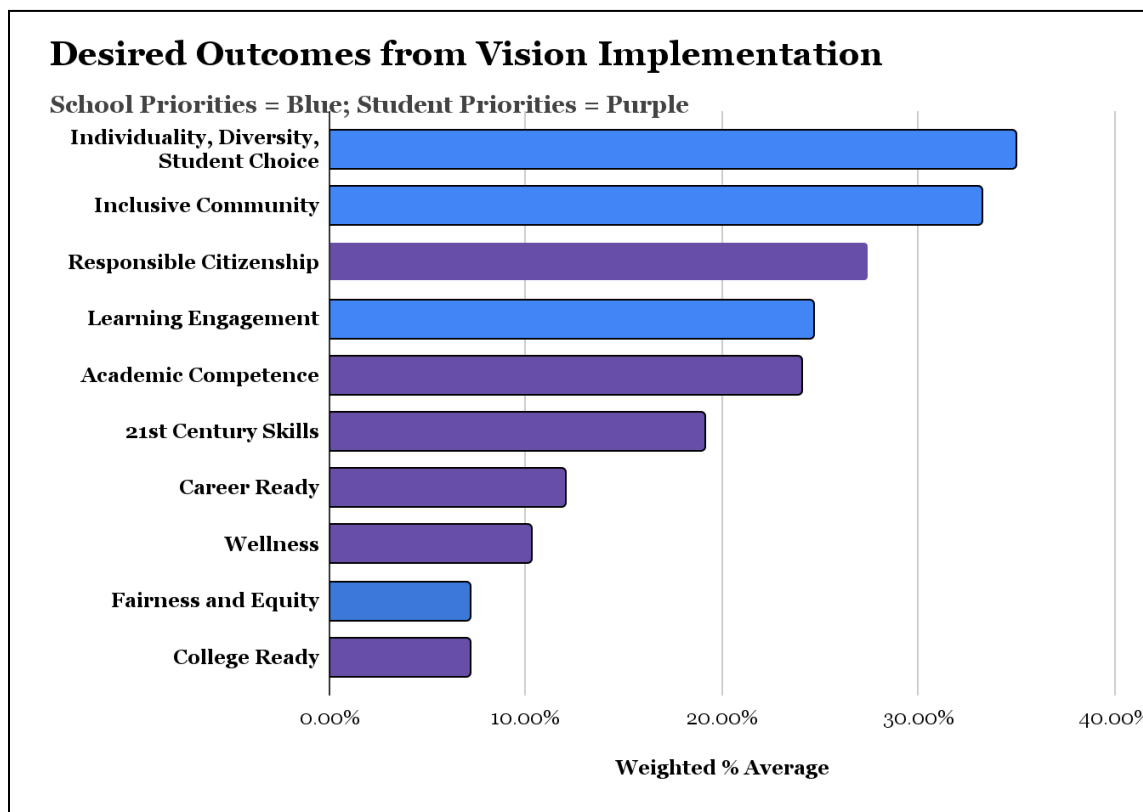
Interestingly, findings related to research question two seem to contradict the desire for an inclusive school culture in research question three; inclusive culture was ranked in the middle of the school values in the closed response question and cohesive school culture was ranked in the bottom third of the closed response questions. On the other hand, inclusive community was a clear priority in the free response questions in research question three. Perhaps answering the free response questions helped stakeholders to clarify their priorities in a different way from simply choosing rankings in a list of close-ended questions. Whatever the reason for the discrepancy, the literature notes these subtle inconsistencies often occur in the visioning process (Criswell et al., 2010; Gaspar, 2015; McTighe & Curtis, 2019).

Chapter Summary

Through examination of the current state at Shelburne (RQ1), the team found foundations for continued improvement and target areas for focus. Investigation of both the principal's notes document and survey responses brought into focus a community that aspired to be better and do better for Shelburne Middle School. At the same time, the fragmentation found in problem diagnosis rose to the surface. All stakeholder groups suggested gaps in communication, discipline, resources, and school morale and SEL support. A clear picture emerged from the data of an SMS in which student behavior has negatively impacted learning. Participant responses indicated that the community wants to update the current support systems and programs at SMS to address current issues and support longer-term change and an environment more conducive to learning.

Data analysis of closed ended survey responses for research question two provided a direction forward by determining shared values and academic priorities. Above all, the community believed the direction forward is through quality education systems and programs for all students. Moreover, stakeholders valued equal access and opportunity for all students and staff. In addition, all stakeholder groups valued academic priorities which build skills of critical thinking, decision making, and communication.

Findings to answer research question three can best be understood in the context of the analysis of research questions one and two. The results of research question one revealed an SMS in which student behavior challenges and disciplinary responses impact learning. In research question three, stakeholders shared a desire for an inclusive, kind community that fosters responsible citizenship. Stakeholders want students to be part of an engaged learning

community. These desired outcomes directly follow from the stakeholder experience of the current state of SMS. Figure 18 provides visual representation of research question three findings.

Figure 18: Cultivating Coherence with School Vision
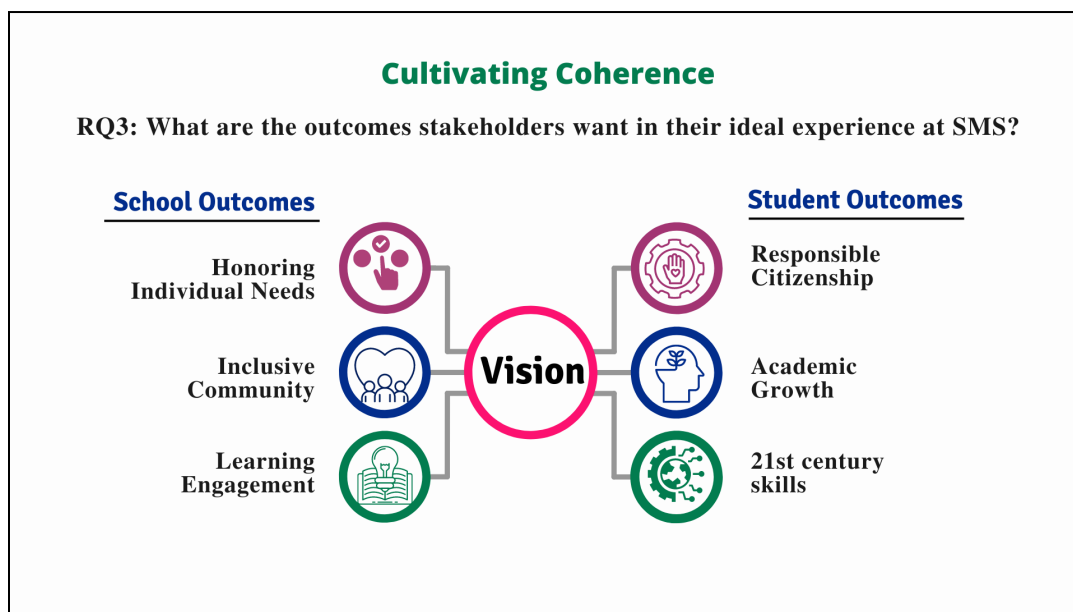
Analysis of the open ended survey questions for research question three provided a deeper perspective on the aspirations or outcomes stakeholders seek in a school vision. Akin to those core values and academic priorities which surfaced in the investigation of research question two, the community valued quality academic growth for all students. Parents, students, and teachers wanted an atmosphere that values respect, community togetherness, and diversity. Additionally, the survey responses revealed the importance of building responsible student citizens in the SMS community.

Piecing together the individual voices among the community reveals common themes. Figure 19 provides representation of the overall team findings that inform our recommendations for SMS.

Figure 19: Overall Findings from Documents & Surveys
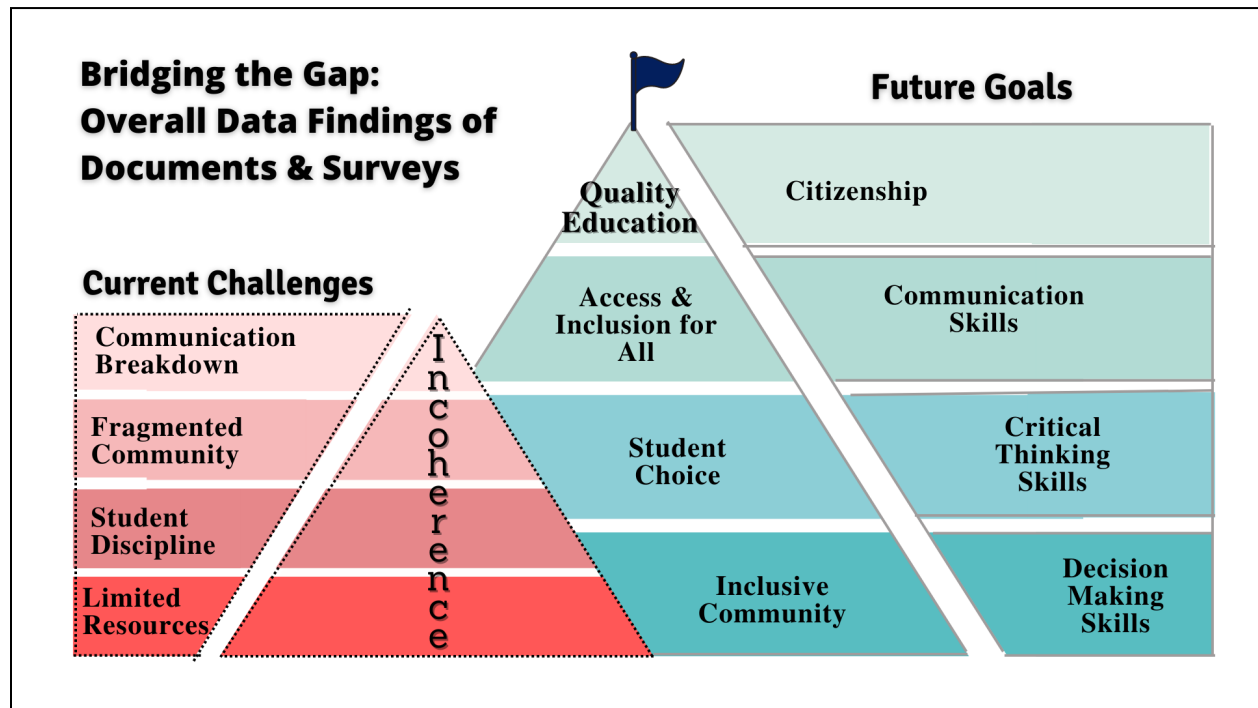
The current challenges in communication, community fragmentation, student discipline and resources have impeded coherence in the current school culture. However, coherence can be seen among all stakeholder groups when it comes to values and aspirations for the school and students. This suggests crafting a new vision of a successful future at SMS will help address the currently fragmented experience by providing that bridge from current reality to a shared future introduced in the literature.

Chapter Five: Recommendations

The purpose of this final chapter is to offer Shelburne Middle School practical recommendations to support their ongoing work to improve the school experience and their intentions to develop a school-wide vision. These recommendations were informed by the Capstone Team findings from our analyses of the problem of practice, stakeholder data, and the literature. We collaborated with Shelburne Middle School as they undertook nascent efforts to develop a vision statement as an anchor point to address the partners' initial concerns about student discipline, student achievement, and teacher satisfaction. Our exploration of the literature pointed to the importance of coherence among people, leadership, resources, and systems to support sustainable change. A vision statement can help support coherence. Schools, including Shelburne, operate within the constant tension of addressing daily needs while guiding their schools forward towards continuous improvement. A vision statement can help school leaders balance addressing the current needs while staying future forward. We also acknowledge that schools cannot pause all work to create a vision or view a vision statement as the sole solution or tool to use in leading change.

Thus, our recommendations are organized to show concurrent paths of actions to address current needs while striving for an improved future. Recommendation one includes sharing the initial findings with the community to create urgency and hope for the collective work ahead. After recommendation one, the subsequent recommendations follow two different strands. Recommendation two proposes actions to support work to lead vision development including establishing a visioning process and connecting instructional goals to vision. Recommendation three outlines steps to address the immediate state of the school including implementing a school

break time and a new student behavior program. Figure 20 provides a visual representation of the simultaneous recommendations school leadership should take at SMS.

Figure 20: Simultaneous Recommendation for SMS Leadership
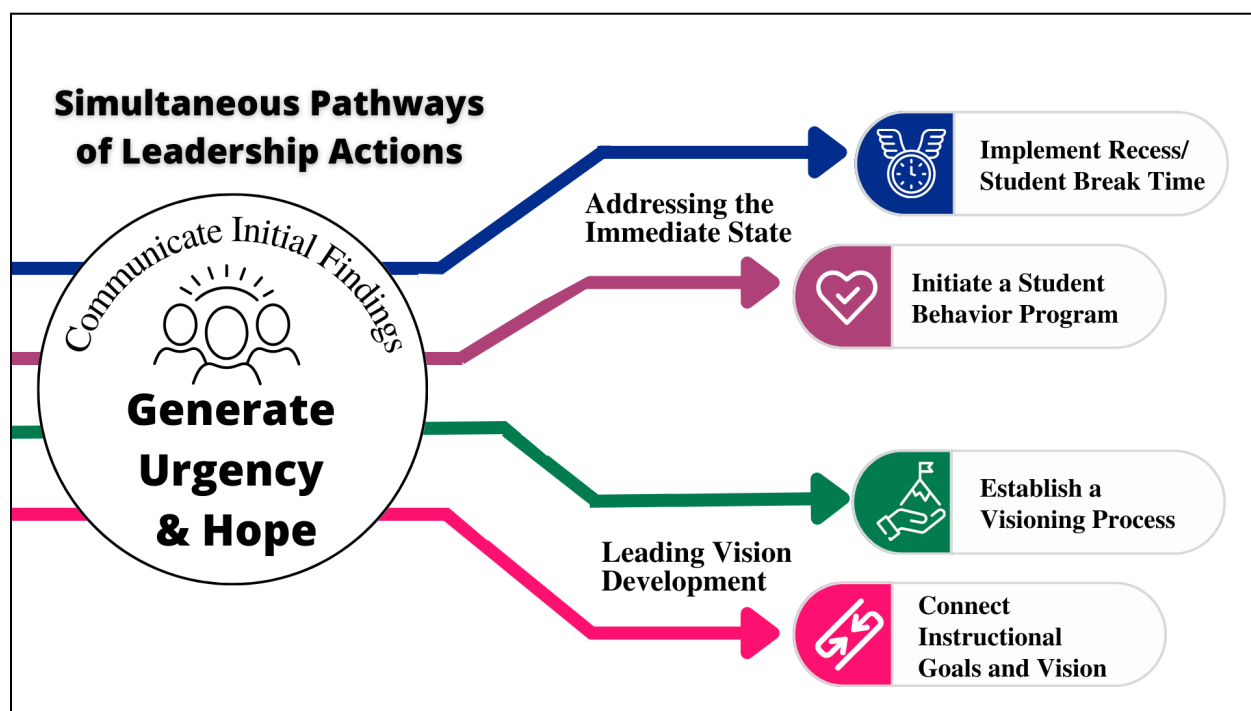
Recommendation One: Share Initial Findings with Stakeholders

Findings about the current state showed that the most frequently shared concerns included communication, discipline, resources, and school morale/SEL. These results provide clarity on needs and where there is shared concern among respondents. School leadership should be empowered to move forward to address these shared concerns. Understanding the needs in the immediate state can help leadership remove barriers that prevent the school from engaging in longer term change. Additionally, knowing the immediate needs can help school leadership to identify where a shared vision can address ongoing concerns. Establishing urgency by communicating the initial findings to address current conditions and hope for an improved future

state can help move SMS towards a common purpose. Once purpose is defined, all systems and teachers "must align all practices, procedures, and policies in light of that fundamental purpose" (Dufour et al. 2008, p. 18). Purpose creates a thread through which all stakeholders are bound together in work towards the collective vision. Communicating how vision can combat some of the shared concerns can create a sense of urgency among stakeholders to commit to developing a vision statement for the school.

Sharing the findings with stakeholders can drive two important, interrelated actions within the SMS community: to unite it in action to address both the immediate concerns and the long-term visioning process. First, sharing the initial findings from the Capstone study will be a way for Principal Warren to refocus the school community towards a shared vision statement. Second, building urgency to create a coalition of stakeholders who prioritize their efforts to create a shared vision will help keep vision from becoming an afterthought (Bolman & Deal, 2017). Through communicating initial findings, Principal Warren can foster conditions that show the need for immediate actions and a shared hope for an improved future; this creates stakeholder buy-in to take next steps on both paths. Cameron and Green (2020) point to the importance of leaders communicating the right message to the right people at the right time. Messages should be tailored to meet the needs of different stakeholder groups. We recommend that Principal Warren share these initial findings with the three different stakeholder groups of staff, students, and parents in different ways. This provides Principal Warren with the opportunity to continue to build trust and engagement.

Principal Warren has the opportunity to lead change with inspiration and hope through the use of effective storytelling of the survey results. We found in our exploration of research questions two and three that the top priorities to include in a vision statement include quality

education, equal opportunity for all students and staff, effective communication skills, critical thinking, and decision making. Stakeholders would like to foster an inclusive, caring community that celebrates diversity, meets students where they are, and offers options and opportunities for students. These future-focused priorities for a vision statement and the idealized future outcome provide hope for an improved SMS. The vision statement can provide the bridge that moves the organization from the current state towards an idealized future (Kotter, 1996). The Capstone Team provided Principal Warren with an executive summary of the survey results (Appendix M) which she can share with the different stakeholder groups as part of her communication strategy.

Communicate Initial Findings with Stakeholders

Staff. Principal Warren should acknowledge to the staff that the vision efforts have not moved forward as quickly as she had planned. Acknowledging this short-term delay, while refocusing the work forward shows vulnerability which can improve trust (Lencioni, 2002). Reinviting staff to participate in the visioning process with the results of the Capstone study as a starting point may help with reengaging in the work to develop a vision.

Students. Principal Warren should share a version of the results with the students of Shelburne. HERD lessons could be a familiar venue to share the information since students were invited to participate in the survey through the HERD lessons in the fall. Principal Warren should include next steps for students when the survey data is shared. Specifically, students should be invited to participate in the next step of the visioning process. Suggestions for what student participation might look like are included in recommendation two.

Parents. Given the low parent response to the survey that was sent out through Principal Warren's weekly email, careful consideration should be given to how to share initial findings

with parents. The goal is to share findings with parents in a way that generates increased

participation, including in the next stages of the visioning process. Including the information in

the weekly email is a start, but other methods of outreach should be considered such as hosting

parent coffees, sharing information in conjunction with back to school nights, and sharing

information through the PTA. SMS leadership should establish modalities for sharing

information with parents outside of email. Recommendation two expands possibilities for SMS

leadership to further build partnerships with the parent community. Table 12 provides a summary

of the recommendations to communicate the initial findings with various stakeholders.

Table 11: Steps to Communicate Initial Findings

Steps to Communicate Initial Findings	
1	Generate urgency and hope through the communication of findings to different stakeholder groups in different ways based on each group's unique role.
2	Acknowledge the slower-than-hoped pace of the process with staff.
3	Share findings in HERD lessons with students.
4	Explore new communication pathways and modalities for parent communication.
5	Use sharing of findings as an invitation for participation with all stakeholder groups.

As visualized in Figure 20, we suggest that after urgency and hope are established

through recommendation one, the remaining actions are conducted simultaneously to meet the

ongoing, competing demands of addressing immediate needs while also taking steps towards an

improved future. Recommendation two outlines the path forward with the process to develop a

vision statement, while recommendation three focuses on a path that addresses two major

concerns in the immediate state.

Recommendation Two: Establish a Visioning Process at SMS

In this section, we discuss recommendations related to establishing a visioning process at SMS. Defining a clear visioning process can help SMS to prioritize competing demands and reduce possible distractions. The school vision–and a collaborative process to develop it–can provide a support system for SMS to unite the community in a clear school purpose (Pekarsky, 2007).

Principal Warren noted in a December 2022 update to the Capstone Team that the current work of the school vision committee had been slow due to other important district level professional development training (L. Warren, personal communication, December 15, 2022). These important trainings impacted the timeline Principal Warren initially anticipated to gain input from staff to help develop a vision statement. We recommend that SMS leadership move forward with four action steps to establish the school visioning process. These steps are outlined in Table 13 and detailed in the following subsections.

Table 12: Steps to Establish a School Vision Process

Steps to Establish a School Vision Process	
1	**Explain Purpose of Visioning.** Be clear about how the vision statement can guide further change and improvement within the school community.
2	**Establish a Timeline.** Structure time and human resources for developing a vision committee, gathering input from each stakeholder group, drafting a vision statement, and finalizing a vision statement.
3	**Develop an Inclusive Process.** Determine how input will be gathered and how stakeholder feedback will inform the vision statement.
4	**Connect Instructional Goals to Vision Statements.** Create instructional goals that support the work of actualizing the finalized vision statement.

Explain Purpose of Visioning

To foster buy-in to the visioning process, the SMS community must understand the purpose and benefits a vision statement offers. Principal Warren should directly explain the purpose and benefits of visioning to stakeholders as she invites the community to participate in the process. As outlined in chapter two, the vision statement helps provide organizational coherence and can set up the conditions for improved school culture, systems and structure. The visioning process can provide a forum for stakeholders to work together to define common values and aspirational outcomes. Principal Warren should emphasize how the vision can instruct both systems and stakeholders on how to operate within the organization (Kose, 2011) and how a vision can serve as the foundation for transformational change (Kantabutra & Avery, 2010).

Just as communication about the purpose and benefits of the visioning process is important, so too is consistent and transparent communication throughout the visioning process. SMS leadership must be purposeful in planning, and clear with the community that they are leading two simultaneous paths to address both immediate needs and long term work with the vision process. According to Kose (2011), consistent and strategic communication through the visioning process provides the school community with overarching purpose, daily direction, and long-term planning goals. Commitment to the visioning process is generated when school leaders encourage, respect, support, and involve all school stakeholders fully in the entire process (Heifetz & Linsky, 2017; Kozlowski & Ilgen, 2006; Kurland et al., 2010).

Establish a Timeline

Below is a suggested timeline for Principal Warren to review with her team as they take next steps in the vision process. As supported in the literature, the input process for visioning is

iterative, and as such, it will take considerable time to craft. Additionally, the team should be flexible for contingencies such as inclement weather days to balance this work with other important school initiatives. The timeline in Table 14 highlights the major benchmarks and a suggested order to accomplish the drafting of a vision statement. We acknowledge that this timeline may not be fully inclusive of all the steps and details but is a useful starting point to launch efforts towards building a vision statement.

Table 13: Example Timeline with Action Steps

Example Timeline with Action Steps	
Timeframe	**Actions**
Month One	• Share initial findings with stakeholder groups • Form a vision team of diverse stakeholder groups • Confirm timeline and key calendar dates for meetings with the vision team and with stakeholder groups • Identify facilitators that can help with future discussions • Train facilitators • Determine dates and locations to engage stakeholders • Identify broader community voices to invite to the input process • Advertise dates and times • Plan input sessions with facilitators • Determine supplies needed and submit orders
Month Two and Three	• Share the initial findings with stakeholders • Set up meeting spaces, supplies, and copies of documents • Facilitators engage with stakeholder groups for feedback to determine: What is missing, What should be prioritized, and What needs needs further clarification/explanation • Gather the feedback and include it in the next iteration of the written document • Advertise dates and times for next meeting with stakeholders
Month Four	• Meet with the vision team to share the updated draft of the written document • Plan input sessions with facilitators focused on gaining input to create a draft vision statement • Provide an updated written document inclusive of stakeholder

	input ● Facilitators engage with stakeholder groups for next round of feedback to determine: What is missing, What should be prioritized, and What needs needs further clarification/explanation ● Gather the feedback and include it in the next iteration of the written document
Month Five and Six	● Meet with the vision team to review stakeholder input and create several draft vision statements for stakeholder feedback ● Train facilitators for the next meeting ● Facilitators engage with stakeholder groups for feedback on the draft vision statements to determine: What is missing, What should be prioritized, and What needs needs further clarification/explanation ● Gather the feedback and include it in the revision of the vision statement ● Narrow down the drafts to one vision statement for review
Month Seven and Eight	● Share the draft vision statement ● Facilitators engage with stakeholder groups for feedback on the draft vision statement to determine: What is missing, What should be prioritized, and What needs needs further clarification/explanation ● This process of iteration should strengthen and deepen stakeholder understanding of and buy-in to the vision statement.
Month Nine	● Share the revised vision statement
Month Ten-onward	● Use the vision statement to anchor and redesign various meetings, structures, and processes across the school to support coherence

Develop an Inclusive Process

SMS leadership should seek to include input from a broad range of stakeholders through a variety of modalities. As discussed in chapter four, two limitations in our study make it critical for SMS to take further action to engage the community to gather input that is fully inclusive of all voices to develop the school's vision. First, the parent participation rate on the survey was low. As such, the parent results are too small to generalize as representative of this stakeholder

group. Second, we offered an inclusive definition of stakeholders in chapter one to include students, faculty, staff, parents, community leaders, and organizations. Due to time and feasibility constraints, our survey did not include input from community leaders and broader community organizations. We acknowledge the importance of these voices in the collaborative process of developing a vision statement.

Build Partnerships with Parents. We recommend that SMS utilize the visioning process as an opportunity to build partnerships with parents. Our low survey response rate from parents suggests that there is opportunity for SMS to further engage and inform parents about the value and need to have their voices present in the vision process. As noted in both the staff survey results and the principal's notes, staff would like to see parents support positive student behaviors and be more aligned with what teachers are doing in the classroom with students. In the survey results, parents also expressed their desires for how students are treated and the importance of physical and social safety. Reengaging parents in the school visioning process can serve as an important forum to build trust and inclusivity.

The visioning input process can help establish a larger purpose that expands the role of parents at SMS. The administrative team can also support additional connections through hosting parent coffees with the principal, town hall meetings, and parent information nights to share key information and opportunities for parent input to include in a vision statement. Lastly, SMS should explore ways to further partner with the Parent Teacher Association, (along with other parent organizations), to better understand the needs, concerns, and goals of parents and to show how their voices bring important perspectives to a shared vision.

Build Partnerships with the Broader Community. According to research, the practice of forming and fostering partnerships allows different roles and interests to interact, fosters co-learning, nurtures innovative ideas, and cultivates ownership of the school vision (Daly-Smith et al., 2020; Franco-Trigo et al., 2019). Through collaborative stakeholder dialogue, community values, beliefs, and desired school outcomes are fully teased out (McTighe & Curtis, 2019). These future conversations at SMS will become a powerful tool to uncover the intricacies and subtleties of stakeholder preferences (Blodget, 2022). SMS leadership should prioritize deepening partnerships within the school community including expanding outreach to community leaders and organizations. Principal Warren and her team should spend time identifying the community leaders and broader community organizations that are important to include in the vision input process. According to Kurland et al. (2010), school leaders that encourage, respect, support, and involve stakeholders in decision making generate enthusiasm and commitment. Research also notes that transformational partnerships are fully realized when people understand the purpose for change, personally connect to the transformation, and are provided with intrinsic motivators (Frese et al., 2003; Hedges, 2012; Kouzes & Posner, 2017). Fostering these partnerships is also achieved through clear and consistent communication (Cameron & Green, 2020; Mendels, 2012; Zimmerman, 2006). Principal Warren has initiated this process with her weekly newsletters to the school community, and further focus on these communications and partnerships will produce community buy-in and strengthen commitment to school wide change initiated with the visioning process.

Utilize Multiple Modalities to Gain Stakeholder Input. Our study collected information related to vision only through survey data. As discussed in the literature review, other forms of gathering of stakeholder input, including workshop activities that involve more

group and self-reflection, can help elicit deeper insights into stakeholders beliefs and values (Ambrose, 1998; Bainbridge, 2007; Criswell et al., 2010; Lattuch & Dankert, 2018). Pursuing different modalities to gain stakeholder input will benefit the vision work.

Finally, we acknowledge that the survey likely excluded some community members due to the language and format. Future vision work at SMS should intentionally engage the most marginalized stakeholders to ensure the vision represents the diverse perspectives and experiences of the community (Bainbridge, 2007; Rodela & Bertrand, 2021, Valenti & Kerr, 2015). As defined by Rodela and Bertrand (2021), these voices include persons of various intersections of identity who may experience differences in income level or learning ability, or have been historically marginalized from having a voice due to uneven power structures based on race and ethnicity, gender identity, and sexual orientation. SMS should work to ensure diverse student and parent voices are heard through modalities like focus groups that are intentionally created to include more marginalized voices that may have been missed in the survey data.

SMS should ensure they establish facilitators to gather stakeholder input. These facilitators should follow a shared protocol to gather and record information. Table 15 outlines five recommendations to reach a broad range of stakeholders. According to the literature (Rafferty & Griffin, 2006; Robinson et al., 2017), with effective visioning processes to engage all school stakeholders, the school vision becomes the center of a school's systems, structures, and practices. SMS must integrate this belief system to allow leadership, school stakeholders, and the circumstances of the community to work together towards actualizing the vision.

Table 14: Steps For an Inclusive Process

Steps for an Inclusive Process	
1	Connect with parents and guardians to gather their hopes for the future of SMS. Consider using familiar channels such as parent meeting nights, open house, PTA meetings, and morning coffees. Consider accessibility for parents and guardians by offering opportunities for feedback in multiple languages and modalities.
2	Ensure diverse voices are heard through creating student focus groups that represent the broad range of identities at SMS.
3	Facilitate focus groups or other group workshop activities related to brainstorming vision priorities within department or team meetings for staff.
4	Establish opportunities for input from community leaders and the broader community to assess what is important to these stakeholders in a future SMS.
5	Focus on varying modality of data collection from stakeholders to include workshops, focus groups, surveys, and open forums for input.

Connect Vision Statement and Instructional Goals for Coherence

Connecting the instructional goals to the vision will support aligned decision making for long-term change and reduce programs and actions that detract from making progress towards achieving the vision (Newmann et al., 2001). Our analysis of survey answers revealed that stakeholders want to see an emphasis on instructional skills in a vision statement. Thus, once the vision statement has been developed, SMS should craft instructional goals that will guide on-going efforts to achieve the idealized, future state. The top-shared instructional priorities among staff, parents, and students focused on students building effective communication, career readiness, critical thinking, literacy, decision making, citizenship, and 21st century skills. These skills promote the development of students across both social and academic planes. Prioritizing

literacy also aligns with the Capstone Team's concern with the decline of 8th grade scores on the EOY English SOL surfaced in the problem analysis.

As defined by Reeves and Fuller (2018), goals are complex and serve multiple roles including the coordinating of efforts, maintaining priorities throughout all efforts, anchoring how to use resources, and indicating levels of progress within the organization. Explained another way, a goal statement should include measurable outcomes that help define an organization's markers of success (Gurley et al., 2014; Kantabutra & Avery, 2010). Effective goals are often referred to as SMART goals, meaning they are specific, measurable, attainable, results-based, and time bound (Conzemius & O'Neill, 2011). In a quantitative analysis of 17 goal statements across different medical organizations, Ogbeiwi (2017) found that goals that included all aspects of the SMART framework were more likely to be successful in achieving their plan. Connecting the SMS vision instructional with goals can foster conditions of coherence and support sustainable change. Goals can further extend the work of the vision by outlining actionable steps and outcomes that operationalize the vision statement into actions and behaviors for stakeholders to collectively commit to following.

Recommendation Three: Address Immediate State of Needs

As discussed in recommendation one, once urgency and hope are established, school leadership should follow two concurrent paths in leading SMS forward. Recommendation three focuses on the path to meet immediate needs that impede progress towards longer term change. Addressing current, concrete concerns should be separate from vision. It is easy for immediate needs to create distractions that can ultimately get in the way of stakeholder focus on future possibilities. Heifetz and Linsky (2017) describe this phenomena as a diversion tactic to rebuff

change. The challenge for school leaders is to maintain balance in addressing immediate needs while leading longer term change through the visioning process. The results from the survey, along with analysis of the principal's notes surfaced a similar tension. Through the investigation of research question one, stakeholders shared common concerns around communication, student behavior/discipline, resources, and SEL/school morale that are negatively impacting the learning experience. SMS stakeholders seemed to be more focused on these concerns than on the academic achievement issues that the Capstone Team identified in our analysis of the context and conditions facing SMS in chapter one. These unmet needs have created a distraction from engaging in conversations about academic concerns. We recommend that SMS formulate teams to attend to current issues to empower teachers to be part of necessary solutions and distribute leadership to keep school administrators from becoming weighed down by an impossible workload. The results from the survey, along with analysis of the principal's notes revealed two areas where a focused team can address immediate concerns: implementing student break or recess time, and designing a collective approach to student behavior.

Implement Student Recess

Students, staff, and parents all expressed the need for a structured social time for students to connect with their peers. Recess, or break time refers to a specific time of day during which students are permitted to engage in recreational or leisure activities outside of the academic setting (London, 2022; Virginia Law, 2022). Researchers across a variety of health and education sectors point to the academic, social-emotional, and physical health benefits students gain from daily recess (Frömel et al., 2016; Hood et al., 2014; Ramstetter & Murray, 2017). Though few studies exist on the implementation of recess at the secondary level in the US (grades 6-12), studies from health researchers point to the benefits daily physical activity (PA) can have on

reducing students' likelihood of developing obesity in adulthood and positively impacting

adolescents' mental health. Recess or break time creates a space for cognitive breaks, peer and

adult interactions, and encourages, but does not require physical activity of students (Bauml et

al., 2020; Behrens et al., 2019; Ramstetter et al., 2010; Ramstetter & Murray, 2017). Several

studies point to teachers reporting improved student focus on academics following breaks and

reductions in negative student behaviors in the classroom (Bark et al., 2010; Carlson et al., 2015;

Ramstetter et al., 2010; Zavacky & Michael, 2017). In a 2021 observational study of 25 schools

across three regions in the US, Massey et al. (2021) identified four crucial aspects for school

leaders to consider in successful recess implementation. Table 16 below offers a summary of

these findings to guide leaders in creating a successful recess plan.

Table 15: Key Considerations for Recess Planning

Considerations for Recess Planning	
1	Monitor and address physical safety for both indoor and outdoor activities
2	Monitor and address social inclusion to reduce bullying and cliques
3	Plan intentionally- build the time into the daily bell schedule, identify dedicated spaces both indoor and outdoor, purchase necessary equipment, create and share expectations for students and staff, establish clear roles and responsibilities for staff monitoring recess
4	Support the social climate- develop and implement SEL lessons in the classroom on social inclusion, kindness, making friends, and navigating peer conflict to support a socially safe recess environment

Overall, a dedicated time in the master schedule for a break can support students' holistic

physical and mental wellbeing. The Capstone Team provided a more detailed summary of the

research related to student breaktime, along with a planning guide to assist Principal Warren and her team with implementing a daily student break (see Appendix N).

Implement a Shared Student Behavior Model

We found that students, staff, and parents believe ongoing student behavioral concerns negatively impact the school experience for all involved. In addition, our exploration of SMS revealed fragmentation in student discipline. Our problem analysis revealed that, prior to this school year, each teacher team designed their own student behavior and discipline plan. Findings from the survey point to ongoing concerns with distracting student behaviors in the classroom, vandalism in student restrooms, and bullying.

SMS should develop and implement a shared student behavior model such as the Positive Behavior Interventions and Supports (PBIS Rewards, 2023). This evidence-based model focuses on the shared commitment and teaching of desired behaviors among students, staff, and parents that build and sustain a positive school climate (PBIS Rewards, 2023). A collective, shared approach to student behavior can streamline processes and build physical and social safety for the entire school community. Table 17 outlines the steps to select a shared behavior model.

Table 16: Recommendations for Steering Committee

Steps to Select A Shared Discipline Model	
1	Look for models that are inclusive to the positive teaching of desired behaviors, and include preventative, not reactive measures
2	Look to evidence-based models for consideration
3	Reach out to schools for feedback on their process for implementation and the results they have achieved
4	Create an implementation plan that builds buy-in across all stakeholders

Conclusion

The community at Shelburne Middle School shows signs of readiness to make changes for long-term success. While the challenges may feel insurmountable and the lift heavy, several findings indicate broad readiness to commit to the work. First, SMS shows signs of stabilization. Within the school community, comparison of the staff needs data from the principal's notes in summer 2022 and the open-ended questions in the survey from November 2022 show a reduction in staff identifying communication as an ongoing issue. In other words, a comparison of the data suggests improvement in communication for staff. Principal Warren and her administrative team implemented processes at the start of the year that suggest improvements to the communication paradigm between staff and the administration. Additionally, Principal Warren took actions at the start of the year to address some aspects of the ongoing fragmentation. The administration designed one bell schedule for the entire school and replaced student team lunches with grade level lunches. Adopting a unified bell schedule has also allowed SMS to reduce overscheduling of staff. We are hopeful that the current administrative team will remain in place to stem the bleed that can happen to a school from leadership churn. SMS has the opportunity to capitalize on the improved communication to gain further input from staff on their readiness to embark on implementing longer-term change.

Second, a recent district budget update suggests broader community support for funding a needed renovation of the school. This renovation will update two career and technical education lab spaces that can enhance future work of the school to expand elective offerings and create courses that strengthen students' career and college readiness. Funds will also support the creation of a common collaborative space that can accommodate an entire grade level (Hite,

2023). SMS can leverage this newly created space to deepen connections. These renovations can enhance the work to improve academics and school morale by creating necessary spaces for teachers and students.

Lastly, the stakeholder groups of staff, students, and parents show alignment in the academic values they want to see in a vision statement and outcomes they hope to see for students and the school. This consistency among stakeholder groups offers a common ground as the school community continues to craft a shared vision. Leadership stabilization, funding allocations, and stakeholder alignment all point to readiness in the community to commit to the longer term work in the creation of a vision.

Our recommendations are designed to support SMS to navigate the complex landscape with at times competing issues. As fellow school leaders, we can appreciate the tensions that exist to address needs both immediate and future. As the administrative team remains in place and the school continues to break through silos within the organization, Shelburne will strengthen conditions for stakeholders to embrace change and do their part to support it. As eloquently stated by a current student at SMS, "I think the ideal vision of Shelburne would be a strong community that works together to promote equality, and strengthen everyone's probability to excel academically and as a community." We believe that crafting and implementing a quality vision statement will support SMS to achieve the bright future it desires and has begun to enact.

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Appendix A: Statement of the Problem of Practice:

Problems of practice are recognized as persistent and specific issues that impede the work of practitioners. These problems can hinder organizational responses to external challenges, create uncertainty within organizational decision-making, or reduce leadership effectiveness. These problems may require a response informed by both theory and practice (Carnegie Project for the Education Doctorate).
What is the problem of practice you wish the team to address? Please be as detailed as possible to help us better gauge if we can serve your needs.

How does a master schedule impact student discipline, student achievement and teacher satisfaction?

Shelburne Middle School is the only middle school in Staunton City Schools, serving 588 students in grades 6-8. Currently, there are 175 students in 6th grade, 185 students in 7th grader and 288 students in 8th grade. For the 2022-23 school year, there are approximately 210 rising 6th graders.

For the past several years, the master schedule has been complicated. This complication looks like: each grade level changing classes at different times, no bell schedule (too many bells to program),

Current Staffing:

Administration: 1 principal, 2 assistant principals

Counselors: 3

Support Staff: 1 Speech Language Pathologists, 1 Special Education Instructional Coach, 1 Instructional Coach, 1 Math Coach, 1Math Interventionist, 1 Reading Plus Coach, 1 Librarian

Instructional Assistants-6 and 1 Library Assistant

There are 7 content teachers in Language Arts, Math, science and social sciences. There are 3 PE teachers, 4 CTE Teachers, 2 band/choir teachers and 1 FTE foreign language teachers. Additional foreign language classes are offered by block with high school teachers.

There are 7 total special education teachers.

Provide a brief background of the organization and overview of the circumstances that led to the request for assistance.What is the specific context shaping this problem of practice?

There is a preschool center, 3 elementary schools, a middle school and a high school in Staunton City Schools. Our middle school has a traditional schedule with grade level teams that are concentrated around the 4 core academic areas - English, history, math, and science.

During the Great Recession, the middle school lost staff, requiring some content teachers to "float" among grade levels, creating a multi-bell schedule. Even with the addition of content staff, the multi-bell schedule has remained. Elective classes may or may not connect explicitly to at the next grade level or as a part of a sequence to coursework in high school.

 Data demonstrates that classes are not balanced, with class sizes varying from the mid-teens to the upper twenties. Further, students designated as "honors" and students designated as "regular" are in the same classes, potentially creating an imbalance in class size. Scheduling for co-taught classes may create imbalance in class size as well.

For several years, a staffing shortage necessitated creative scheduling. Now that staffing levels are sufficient to meet student needs, an impartial look at creating master schedules would be beneficial.

Appendix B: Users at the Center: Systems Mapping

Role of Master Schedule

Leadership Priorities

- **Increased time for planning & mentorship**
- **Maintain grade level teams**
- **School recess**
- **Diversification of elective options**
- **Reduce number of lunch periods**
- **Cohesive bell schedule across all grade levels**

Stakeholder Requests

- **Student Academic Success**
- **Scheduling Coherence**
- **Consistency in Discipline**
- **School Pride**
- **Career & College exploration within elective courses**
- **Engagement in Teaching & Learning**

Undetermined

- **Approach to student remediation**
- **Roles and expectations of SPED co-teams**
- **Integration of student and teacher voice**
- **School-wide literacy**
- **Classroom utilization of instructional coaches**

Appendix C: Sample of Google Data Studio Shelburne Middle School Data Display
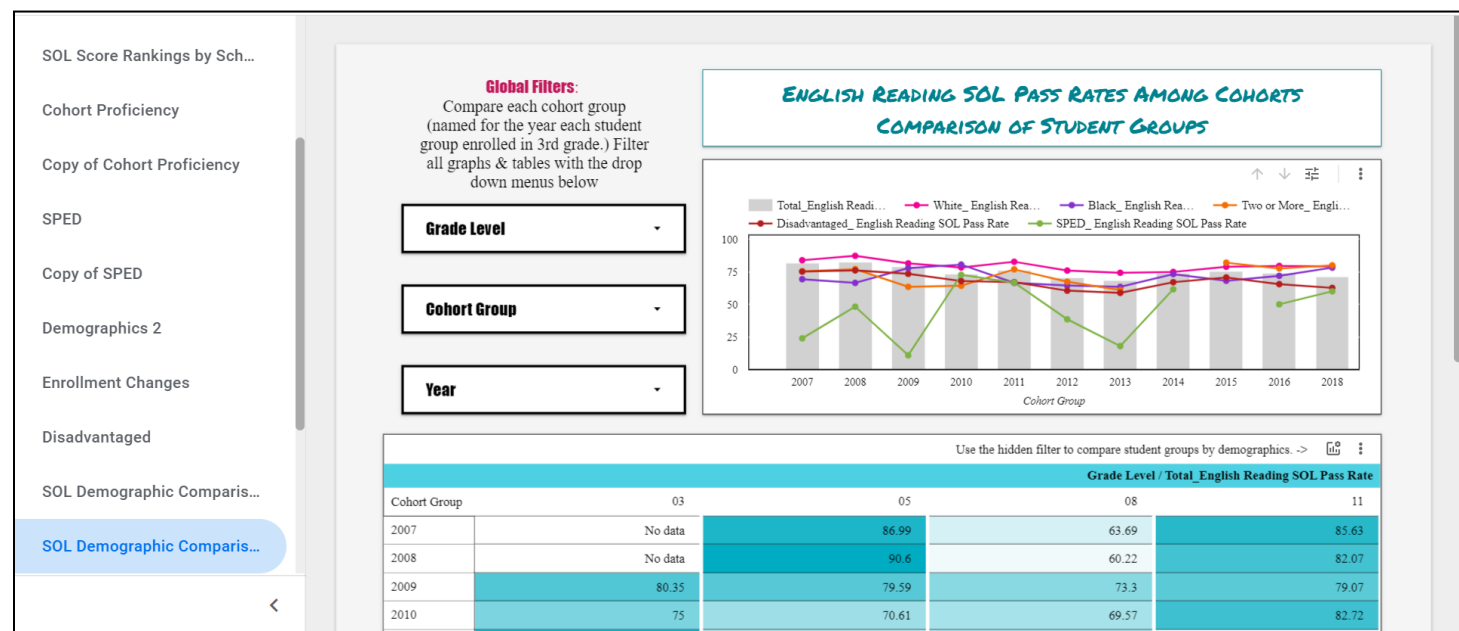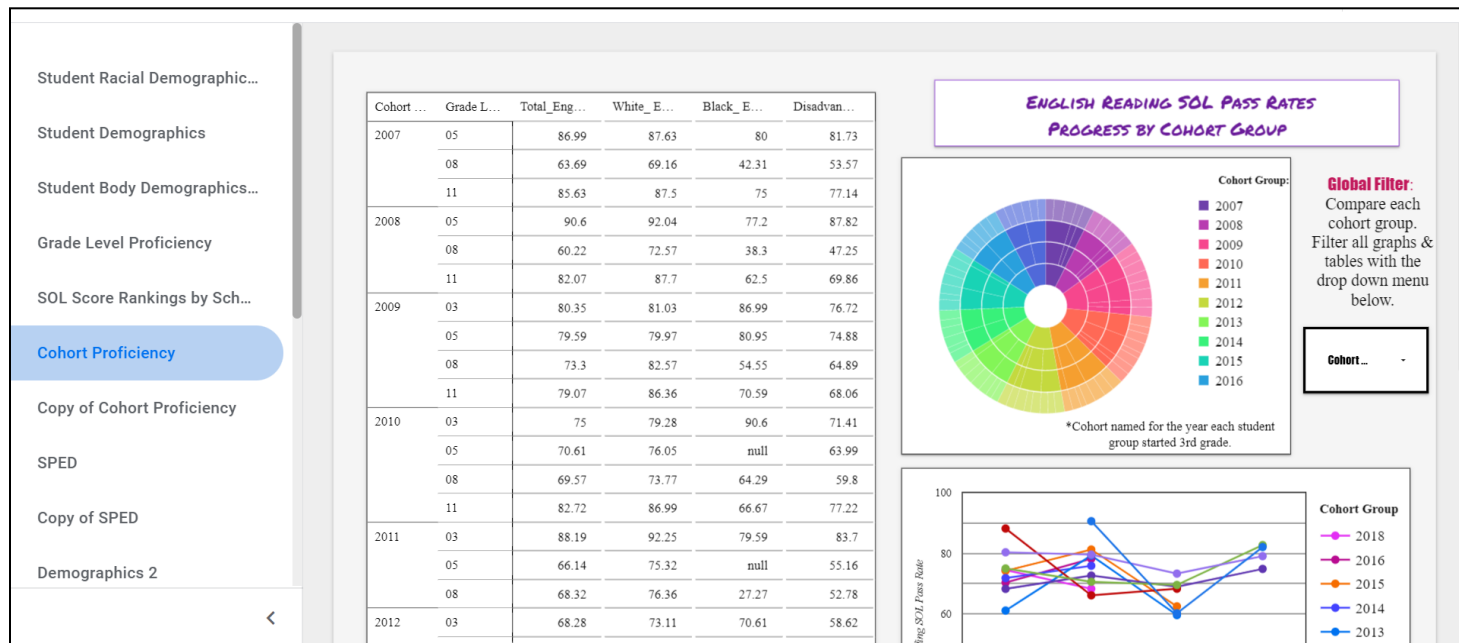
Appendix D: Study Code Book

Study Code Book for Principal's Notes and Final Survey Question

Code Book for Principal's Notes and Final Survey Question
Concerns about student learners: Comments highlight areas of concern related to students
● *Student Behavior*: Specific challenges regarding student behavior
● *Student Academic Achievement:* comments related to concerns with how students are academically performing
Concerns with current operating systems: Comments highlight areas of concern that impact the overall operations of the system and how it impacts staff job performance
● *Resource needs*: Comments that highlight concerns with resources and supports needed to complete job
● *Classroom instruction*: Comments that note concerns with instructional delivery and pedagogical practices
● *School morale:* Comments that note concerns with the current morale within the school culture
● *Communication*: Comments that note gaps in communication processes within the school organization

Appendix E: Vision Survey for Stakeholders

Vision Survey

(Google Form)

Shelburne Middle School is seeking input from students, staff and faculty, and stakeholders to define our school vision statement.

A school vision statement describes a successful and desirable future state for a school. It's a big goal the school wants to achieve for students through the experiences the school offers them. Staunton City Schools has a vision statement that defines outcomes for all students in the district. We are currently in the process of creating a vision statement specifically for SMS.

Your input will help inform the SMS vision statement. Our goal is to come together with a common focus, make this information transparent, and use this as a guide for decision-making now and in our future.

This survey should take about 12 minutes to complete and all responses will be confidential.

---

1. Please indicate your role in the Shelburne Middle School Community:

   ☐ Student

   ☐ Parent or primary caregiver of a Shelburne Middle School Student

   ☐ Teacher

   ☐ Staff Member

   ☐ Staunton City Community Member

Staunton City Schools vision statement: "**Staunton City School students will be upstanding citizens, innovative thinkers, and creative problem solvers who inspire others through their example.**" Please rate your level of agreement with the following statements from Strongly Agree to Strongly Disagree.

2. This vision statement accurately describes the goals of students to reach at Shelburne Middle School.

   ☐ Strongly Agree

   ☐ Agree

   ☐ Neutral

   ☐ Disagree

   ☐ Strongly Disagree

3. I understand the Staunton City Schools vision statement.

   ☐ Strongly Agree

   ☐ Agree

   ☐ Neutral

   ☐ Disagree

   ☐ Strongly Disagree

4. Values are beliefs that are shared amongst stakeholders of an organization. Values drive an organization's culture and priorities, and provide a framework in which decisions are made. Examples of values include continuous learning, community, integrity, excellence, accountability, etc.

Please identify values that are important to you at SMS? by ranking each value. (5=this value is extremely important to me, 4=this value is important to me, 3=neutral- neither find this value important or unimportant, 2=this value is not important to include in the school's vision, 1=I do not understand this value)

5. A just and fair community

☐ 5 - this value is extremely important to me

☐ 4 - this value is important to me

☐ 3 - neutral- neither find this value important or unimportant

☐ 2- this value is not important to include in the school's vision

☐ 1 - I do not understand this value

6. Cohesive school culture

☐ 5 - this value is extremely important to me

☐ 4 - this value is important to me

☐ 3 - neutral- neither find this value important or unimportant

☐ 2- this value is not important to include in the school's vision

☐ 1 - I do not understand this value

7. Collaborative decision making with faculty, parents and school administrators

☐ 5 - this value is extremely important to me

☐ 4 - this value is important to me

☐ 3 - neutral- neither find this value important or unimportant

☐ 2- this value is not important to include in the school's vision

☐ 1 - I do not understand this value

8. Compassionate school culture

☐ 5 - this value is extremely important to me

☐ 4 - this value is important to me

☐ 3 - neutral- neither find this value important or unimportant

☐ 2- this value is not important to include in the school's vision

☐ 1 - I do not understand this value

9. Creativity

☐ 5 - this value is extremely important to me

☐ 4 - this value is important to me

☐ 3 - neutral- neither find this value important or unimportant

☐ 2- this value is not important to include in the school's vision

☐ 1 - I do not understand this value

10. Innovation to try new things

☐ 5 - this value is extremely important to me

☐ 4 - this value is important to me

☐ 3 - neutral- neither find this value important or unimportant

☐ 2- this value is not important to include in the school's vision

☐ 1 - I do not understand this value

11. Risk taking

☐ 5 - this value is extremely important to me

☐ 4 - this value is important to me

☐ 3 - neutral- neither find this value important or unimportant

☐ 2- this value is not important to include in the school's vision

☐ 1 - I do not understand this value

12. Equal Opportunity for all students and staff

☐ 5 - this value is extremely important to me

☐ 4 - this value is important to me

☐ 3 - neutral- neither find this value important or unimportant

☐ 2- this value is not important to include in the school's vision

☐ 1 - I do not understand this value

13. Striving for excellence

☐ 5 - this value is extremely important to me

☐ 4 - this value is important to me

☐ 3 - neutral- neither find this value important or unimportant

☐ 2- this value is not important to include in the school's vision

☐ 1 - I do not understand this value

14. Growth Mindset

☐ 5 - this value is extremely important to me

☐ 4 - this value is important to me

☐ 3 - neutral- neither find this value important or unimportant

☐ 2- this value is not important to include in the school's vision

☐ 1 - I do not understand this value

15. Inclusive school culture

☐ 5 - this value is extremely important to me

☐ 4 - this value is important to me

☐ 3 - neutral- neither find this value important or unimportant

☐ 2- this value is not important to include in the school's vision

☐ 1 - I do not understand this value

16. Building future leaders

☐ 5 - this value is extremely important to me

☐ 4 - this value is important to me

☐ 3 - neutral- neither find this value important or unimportant

☐ 2- this value is not important to include in the school's vision

☐ 1 - I do not understand this value

17. Promotion of lifelong learning

☐ 5 - this value is extremely important to me

☐ 4 - this value is important to me

☐ 3 - neutral- neither find this value important or unimportant

☐ 2- this value is not important to include in the school's vision

☐ 1 - I do not understand this value

18. Culture of community partnership

☐ 5 - this value is extremely important to me

☐ 4 - this value is important to me

☐ 3 - neutral- neither find this value important or unimportant

☐ 2- this value is not important to include in the school's vision

☐ 1 - I do not understand this value

19. Quality education

☐ 5 - this value is extremely important to me

☐ 4 - this value is important to me

☐ 3 - neutral- neither find this value important or unimportant

☐ 2- this value is not important to include in the school's vision

☐ 1 - I do not understand this value

20. Student Focused

☐ 5 - this value is extremely important to me

☐ 4 - this value is important to me

☐ 3 - neutral- neither find this value important or unimportant

☐ 2- this value is not important to include in the school's vision

☐ 1 - I do not understand this value

There may be values not identified in questions 4 - 19, which you see as important to the Shelburne Middle School. Please include those values in your response to the next question.

A Vision defines the way a school looks in the future. The vision is a long-term view that describes the overarching goals for the students and for the school. For example, a vision may read, "Every student at Shelburne Middle School will become a responsible and productive citizen."

21. Please describe your vision of an ideal <u>Shelburne Middle School</u>. You may include values you ranked as very important in questions 4 -19. You may also include values you see as important which were not listed in questions 4 - 19.

Academic priorities drive school practices, decisions, and classroom instruction. What type of academic priorities should define Shelburne Middle School? What do you believe are the core skills or knowledge (e.g., critical thinking, effective communication, leadership skills, resilience, global awareness, etc.) every student Shelburne Middle School should have to be successful?

Please identify academic priorities that you believe are most important to student success at Shelburne Middle School. (1 = this value is not important, 2 = this value is somewhat unimportant, 3 = this value is somewhat important, 4 = this value is important, 5 = this value is very important).

22. Critical thinking

☐ 5 - this value is extremely important to me

☐ 4 - this value is important to me

☐ 3 - neutral- neither find this value important or unimportant

☐ 2- this value is not important to include in the school's vision

☐ 1 - I do not understand this value

23. Effective communication

☐ 5 - this value is extremely important to me

☐ 4 - this value is important to me

☐ 3 - neutral- neither find this value important or unimportant

☐ 2- this value is not important to include in the school's vision

☐ 1 - I do not understand this value

24. Leadership skills

☐ 5 - this value is extremely important to me

☐ 4 - this value is important to me

☐ 3 - neutral- neither find this value important or unimportant

☐ 2- this value is not important to include in the school's vision

☐ 1 - I do not understand this value

25. Resilience

☐ 5 - this value is extremely important to me

☐ 4 - this value is important to me

☐ 3 - neutral- neither find this value important or unimportant

☐ 2- this value is not important to include in the school's vision

☐ 1 - I do not understand this value

26. Global awareness

☐ 5 - this value is extremely important to me

☐ 4 - this value is important to me

☐ 3 - neutral- neither find this value important or unimportant

☐ 2- this value is not important to include in the school's vision

☐ 1 - I do not understand this value

27. Collaboration skills

☐ 5 - this value is extremely important to me

☐ 4 - this value is important to me

☐ 3 - neutral- neither find this value important or unimportant

☐ 2- this value is not important to include in the school's vision

☐ 1 - I do not understand this value

28. Decision making

☐ 5 - this value is extremely important to me

☐ 4 - this value is important to me

☐ 3 - neutral- neither find this value important or unimportant

☐ 2- this value is not important to include in the school's vision

☐ 1 - I do not understand this value

29. Technology & Digital Literacy

☐ 5 - this value is extremely important to me

☐ 4 - this value is important to me

☐ 3 - neutral- neither find this value important or unimportant

☐ 2- this value is not important to include in the school's vision

☐ 1 - I do not understand this value

30. STEM - Science, Technology, Engineering, & Mathematics based learning

☐ 5 - this value is extremely important to me

☐ 4 - this value is important to me

☐ 3 - neutral- neither find this value important or unimportant

☐ 2- this value is not important to include in the school's vision

☐ 1 - I do not understand this value

31. Citizenship

☐ 5 - this value is extremely important to me

☐ 4 - this value is important to me

☐ 3 - neutral- neither find this value important or unimportant

☐ 2- this value is not important to include in the school's vision

☐ 1 - I do not understand this value

32. College Readiness

☐ 5 - this value is extremely important to me

☐ 4 - this value is important to me

☐ 3 - neutral- neither find this value important or unimportant

☐ 2- this value is not important to include in the school's vision

☐ 1 - I do not understand this value

33. Career Readiness

☐ 5 - this value is extremely important to me

☐ 4 - this value is important to me

☐ 3 - neutral- neither find this value important or unimportant

☐ 2- this value is not important to include in the school's vision

☐ 1 - I do not understand this value

34. Literacy

☐ 5 - this value is extremely important to me

☐ 4 - this value is important to me

☐ 3 - neutral- neither find this value important or unimportant

☐ 2- this value is not important to include in the school's vision

☐ 1 - I do not understand this value

35. Study Skills

☐ 5 - this value is extremely important to me

☐ 4 - this value is important to me

☐ 3 - neutral- neither find this value important or unimportant

☐ 2- this value is not important to include in the school's vision

☐ 1 - I do not understand this value

There may be academic priorities not identified in questions 21 - 34, which you see as important

to the growth of students at Shelburne Middle School. Please include those academic priorities in

your response to the next question.

A Vision defines the way a school looks in the future. The vision is a long-term view that describes the overarching goals for the students and for the school. For example, a vision may read, "Every student will graduate and become a responsible and productive citizen."

36. Please describe your vision for the future of <u>students</u> at Shelburne Middle School. You may include academic priorities you ranked as very important in questions 21 - 34. You may also include academic priorities you see as important that were not listed in questions 21 - 34.

We are working to continually improve our school and students' academic experience. Consider your current experience at Shelburne Middle School.

What is one issue or challenge would you like to see changed to make the experience at SMS better for all students?

Appendix F: Communication Materials for Survey Distribution

Shelburne Middle School has partnered with a group of doctoral students in the Educational Leadership Program at Virginia Commonwealth University to gather input from students, parents, and teachers to inform the creation of a school vision statement. Your input will help inform the SMS vision statement. Our goal is to come together with a common focus, make this information transparent, and use this as a guide for decision-making now and in our future.

On behalf of the team from VCU, Nicole Herndon, Heather Holcomb, and Audra Krupp, we ask for your help in this process by filling out a survey accessed by clicking on the link below. This survey should take about 12 minutes to complete and all responses will be confidential. Your participation is voluntary, and you may choose to stop at any time by closing the browser window.

https://forms.gle/xBvdkNfoaUeWCPFr9

Appendix G: Study Code Book for Open-Ended Vision Survey Responses

Code Book for Open-Ended Vision Survey Responses
Vision related to students: Comments highlight vision priorities related to students
● *Academic Competencies*: Focus on content knowledge
● *21st Century Skills*: Focus on critical thinking, problem solving, collaboration, leadership
● *Responsible Citizenship*: Focus on good behavior and contribution to community
● *Career Ready*: Focus on being prepared for workforce
● *College Ready:* Focus on being prepared for college
● *Wellness:* Focus on student wellbeing including mental and physical
Vision related to Shelburne Middle School: Comments highlight vision priorities related to SMS as a whole community
● *Inclusive Community*: Comments that highlight desire for a community centered on acceptance, togetherness, and caring
● *Learning Engagement*: Comments that highlight desire for engaged, curious students and teachers eager to participate in the community
● *Fairness/Equity:* Comments that highlight desire for equal access and opportunities for

all students.
● *Individuality/Diversity/Student Choice*: Comments that highlight desire for a community that celebrates diversity and allows students to be themselves and choose their paths

Appendix H: Average School Value Ranking Among Stakeholder Groups

Average School Value Rankings			
School Value	**Parents**	**Students**	**Teachers & Staff**
A fair and just community	4.53	3.98	4.31
Cohesive School Culture	4.11	3.56	3.77
Collaborative decision making with faculty, parents, and school administrators	4.26	3.74	4.23
Compassionate school culture	4.47	3.71	4.12
Creativity	4.42	4.19	4.16
Innovation	4.05	3.64	4.24
Risk taking	3.53	3.50	3.85
Equal opportunity for all students and staff	4.68	4.367	4.50
Striving for excellence	4.63	3.96	4.62

Growth mindset	4.74	3.94	4.50
Inclusive school culture	4.47	3.92	4.50
Building future leaders	4.11	3.81	4.42
Promotion of lifelong learning	4.74	3.69	4.58
Culture of community partnership	4.16	3.78	4.00
Quality education	4.89	4.22	4.69
Student Focused	4.47	4.02	4.31

Appendix I: Average Academic Priority Ranking Among Stakeholder Groups

Average Academic Priority Rankings			
Academic Priority	**Parents**	**Students**	**Teachers & Staff**
Critical thinking	4.78	4.04	4.73
Effective communication	4.84	4.07	4.72
Leadership skills	4.05	3.89	4.08
Resilience	4.32	3.56	4.65
Global awareness	4.11	3.93	4.19
Collaborative skills	4.26	3.87	4.42
Decision making	4.47	4.17	4.65
Technology & Digital literacy	4.05	3.81	4.31
STEM - Science, Technology, Engineering, & Mathematics based learning	3.74	4.01	3.92

Citizenship	4.53	4.03	4.46
College readiness	3.58	3.85	3.81
Career readiness	3.74	4.17	4.35
Literacy	4.84	3.73	4.72
Study skills	4.42	3.90	4.20

Appendix J: Code Frequency for SMS Community Vision Priorities by Stakeholder Group

	Inclusive Community	Learning Engagement	Fairness and Equity	Individuality, Diversity, Student Choice	Total
Frequencies of Vision Priorities (% of code within the stakeholder group)					
Parents	9 (30%)	9 (30%)	1 (3.3%)	11 (36.7%)	30
Students	51 (41.8%)	30 (25.6%)	12 (9.8%)	29 (23.8%)	122
Teachers	10 (27.8%)	7 (19.4%)	3 (8.3%)	16 (44.4%)	36

Appendix K: Code Frequency for SMS Student Vision Priorities by Stakeholder Group

	21st Century Skills	Academic Competencies	Career Ready	College Ready	Responsible Citizenship	Wellness	Total
Frequencies of Student Vision Priorities (% of code within the stakeholder group)							
Parents	9 (28.1%)	8 (25%)	3 (9.4%)	2 (6.3%)	7 (21.9%)	3 (9.4%)	32
Students	9 (8.1%)	26 (23.4%)	18 (16.2%)	8 (7.2%)	32 (28.8%)	18 (16.2%)	111
Teachers	8 (21.1%)	9 (23.7%)	4 (10.5%)	3 (7.9%)	12 (31.6%)	2 (5.3%)	38

Appendix L: Combined Stakeholder Ranking Score of All School Values and Academic Priorities

Overall Ranking Scores			
School Values		**Academic Priorities**	
Quality education	4.60	Effective communication	4.54
Equal opportunity for all students and staff	4.52	Critical thinking	4.52
Striving for excellence	4.40	Decision making	4.43
Growth mindset	4.39	Literacy	4.43
Promotion of lifelong learning	4.33	Citizenship	4.34
Inclusive school culture	4.30	Collaborative skills	4.19
A fair and just community	4.27	Resilience	4.18
Student Focused	4.27	Study skills	4.18
Creativity	4.26	Career readiness	4.09
Building future leaders	4.11	Global awareness	4.08
Compassionate school culture	4.10	Technology & Digital literacy	4.06
Collaborative decision making with faculty, parents, and school administrators	4.08	Leadership skills	4.01
Innovation	3.98	STEM - Science, Technology, Engineering, & Mathematics based learning	3.89
Culture of community partnership	3.97	College readiness	3.74
Cohesive School Culture	3.81		

| Risk taking | 3.62 |

Appendix M: Executive Summary - Vision Shelburne Middle School

Link to SMS Vision Deliverable

Appendix N: Executive Summary - Student Recess in Middle School

Link to SMS Recess Deliverable