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The Organizational Improvement Plan at Western University

Education Faculty

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Renewing the Conversation: Monetary Award Governance

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Abstract

In Canada, providing access to post-secondary education to everyone who wants it, is both a noble and multifaceted notion. This Organizational Improvement Plan (OIP) addresses one facet of accessibility to Lynnwood University (LYNU; a pseudonym), with a focus on monetary awards (e.g. scholarships). Like many institutions, LYNU has made public commitments in support of equity, diversity, and inclusion (EDI), and has increased efforts to recruit equity-deserving students using monetary awards which will help offset concerns of student affordability. Access to financial resources is a key factor for many students and without it, they may be unable to pursue their education as monetary awards can provide some or all financial resources needed to pay for tuition and living expenses. LYNU monetary awards are governed under institutional policies that hold students to academic requirements, and students who do not meet these conditions will have their award funding rescinded. Students who lose their award are often placed in a position of financial distress, and some will have to abandon their studies as they can no longer afford to study at LYNU or be forced to take on employment to supplement their income which leaves less time to focus on their academic assignments. This OIP recommends immediate changes to monetary award policies at LYNU which will be considered radical by some, and long overdue by others, but will be focused on improving student access to post-secondary education and encouraging regular reviews of policies through an EDI lens.

Keywords: monetary awards, access, student affordability, equity-deserving students

Executive Summary

Many people use the words awards and scholarships interchangeably and associate both with money given to students pursuing a post-secondary education, but despite their similarities they have different meanings. One is intended to acknowledge leadership, personal achievements, and financial need, while the other is given as recognition of academic excellence. For this Organizational Improvement Plan (OIP), the term *monetary award(s) or award(s)* will be used interchangeably to describe both scholarships and awards, and more specifically, refers to sums of money provided to students based on academic merit, or a combination of academic merit and financial need.

The Problem of Practice (PoP) addresses the lack of access by student award recipients to the awards they were promised by Lynnwood University (LYNU; a pseudonym) when they accepted their offer of admission. LYNU, like many Canadian post-secondary institutions, uses awards to recruit top students to study at their institution. Undergraduate student award funding is paid in equal installments over four years to help cover the costs of tuition, books, and other living expenses. Awards are governed under institutional policies requiring students to meet minimum academic and credit load requirements, and if this is not achieved, then the student will cease to receive any remaining money from their award.

Although the problem being described appears to only impact a subset of students, it is a critical obstacle faced by students who may need it the most. Commitments made by LYNU leadership in support of equity, diversity, and inclusion (EDI) are not reflective in current award policies and are misaligned with the overall university strategic plan. Equity-deserving students often face more barriers and hardships than most and require assistance to level the playing field (Soria et al., 2014). LYNU award funding has increased over the past decade to create additional awards specific to the growing numbers of equity-deserving students (LYNU, 2021), which also supports the university commitment and dedication towards reconciliation with Indigenous people. This OIP looks to address the PoP and

recommend a thoughtful and sustainable solution to support students and to ensure LYNU adheres to the commitments made in their strategic plan.

Chapter 1 opens by introducing the organizational context of LYNU and provides insight into its current state. It immediately identifies the problems faced by student award recipients and the misalignment of strategic goals with existing award policies. The chapter speaks to the need for urgent changes to the status quo within the award program while describing the use of my adaptive-authentic leadership style to manage the change process. A thorough analysis will be presented to recognize micro, meso, and macro level influences that could impede changes to award policies, and factors causing the resistance to change will be identified. The chapter closes with an explanation of why change is needed for the award program at LYNU, the importance of leadership support, and the critical nature of integrating EDI and social justice practices into future policies.

Chapter 2 demonstrates how a combined change framework can help LYNU address both operational and emotional concerns during the organizational transition. While diving deeper into the adaptive-authentic leadership approach to change, this chapter also shows how Lewin's (1951) change management model and Bridges' (2009) transition model can support the process of organizational change, and how the blending of these two specific frameworks will complement my adaptive-authentic leadership approach. Ensuring the LYNU community is ready for change is assessed through Lewin's (1943) force field analysis technique and Judge and Douglas' (2009) eight dimensions of organizational capacity to change. The additional application of an ethical decision-making framework will ensure that changes recommended to award policies will meet EDI responsibilities. Chapter 2 ends with a recommended solution which will best address the PoP.

Chapter 3 offers a comprehensive description of the change implementation plan which focuses on the logistical requirements of the change and managing reactions of the people. A thoughtful communication strategy is created using Lewin (1951) and Bridges' (2009) change frameworks as the

basis of the approach. The integration of a knowledge mobilization plan within the communication plan will help build a connection between academic research and equitable changes to the award policies. Keeping people informed of the change will increase feelings of confidence, and I will need to provide time for the new policies and procedures to be properly socialized during the change transition (Lewis, 2011). Data gathered through evaluation and measurement assessments using key performance indicators imbedded within Kaplan and Norton's (1996) balanced scorecard can gage performance and help set goals to achieve individual and organizational change objectives. By leveraging the information collected during the change process and making ongoing adjustments, I can help LYNU gain a competitive advantage in awards and simultaneously align their policies to strategic commitments. The chapter finishes with a short summation of next steps and the OIP concludes with the conviction that immediate change must be applied to award policies at LYNU. The leadership at LYNU must be persistent in their efforts to incorporate EDI practices into award policies and push through organizational cultural norms which can often get in the way of change and create resistance (Schein, 2017). Student access to award funding must be prioritized, and I must challenge the status quo and work tirelessly to support students.

Acknowledgements

I begin by acknowledging that I reside on the traditional, ancestral, and unceded territory of the Musqueam people. I am grateful to have been able to complete my studies surrounded by the beautiful lands around me, all while the demands of work and family were competing for my time. I am part of a resilient subset of people who started an academic program during a pandemic, which meant frequently having to deal with extraordinary conditions while maintaining a degree of normalcy in our lives.

I accidentally stumbled into the post-secondary industry not realizing that it would become my intended career, and that it would inspire me to explore personal growth. My biggest supporter has been my husband Greg, and I thank him for being caring and patient in all the years we have been together (25 years and counting!). My family, friends, and colleagues have all helped me with kind words, sound advice, and much needed humor. I have met a wonderfully supportive group of people who went through the program with me, and I thank them for sharing their experiences. I have learned so much from the instructors at Western and was fortunate to have been mentored by Dr. McKivor who provided me with guidance, support, and understanding. It was a privilege to have shared this learning experience with such amazing people.

As I look forward, I remember fondly of the past. There were times when I was exhausted and frustrated, but most times I was excited and encouraged. The past three years were the slowest and also the fastest, that I have ever experienced. I am grateful to have been able to attain such an incredible education and gained a wonderful experience.

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Acronyms

BSC   Kaplan and Norton's Balanced Scorecard for Change

BTM   Bridges' Transition Model

CIP   Change Implementation Plan

EDI   Equity, Diversity, and Inclusion

GPA   Grade Point Average

KPI   Key Performance Indicators

LCM   Lewin's Change Management Model

LYNU   Lynnwood University

OIP   Organizational Improvement Plan

PoP   Problem of Practice

SSA   Student Support & Advising

Definitions

Equity-Deserving Students: Students who are historically underrepresented in, and underserved by post-secondary institutions, for example students who are racialized, LGBTQ+, first generation, and/or Indigenous (Cook-Sather, 2018).

Grade Point Average (GPA): A numerical representation of a student's quality of academic performance based on an average of all the grades they receive (Daka & Changwe, 2020).

Horizontal Equity: Providing equal treatment and provisions to all students (Berne & Stiefel, 1994).

Merit-Based Awards: A form of non-repayable financial aid that does not consider a student's financial need, but rather is awarded based on academic, athletic, leadership, or special-interest merit (Graziosi, 2014).

Monetary Awards / Awards: For this OIP, monetary awards or awards, will refer to non-repayable financial aid granted in the form of either merit-based or need-based awards. Most monetary awards at LYNU are governed under Senate award policies and are paid out in equal installments over four years.

Need-Based Awards: A form of non-repayable financial aid granted to students primarily based on their personal income and assets, family income and assets, enrolment status (full time or part time), family size, parental age, and institution of attendance (Hoxby, 2004).

Senate: For this OIP, there are two governing bodies at LYNU responsible for all academic matters. Each Senate governs their campus and has authority in areas such as admissions, exams, academic discipline, and student awards.

Social Justice: The fair and equitable distribution of power, resources, and obligations in society to all people, regardless of race or ethnicity, age, gender, ability status, sexual orientation, and religious or spiritual background (Van den Bos, 2003, as cited in Ayala et al., 2011).

Vertical Equity: Ensuring that students with greatest needs or in disadvantaged conditions will receive more resources (Berne & Stiefel, 1994).

Chapter 1: Introduction and Problem

There are many barriers for students to access post-secondary education, and the cost of attendance is one of the major impediments (Beer & Bray, 2020; Lang, 2005; Soria et al., 2014). Monetary awards are extremely attractive to students accepting their offer of admission to university, but what is often overlooked are the conditions which govern the award or the consequences of what happens if you do not meet the terms of the award. In this first chapter of the Organizational Improvement Plan (OIP), I will describe the organizational context of Lynnwood University (LYNU; a pseudonym) and explain my leadership positionality and approach in support of the Problem of Practice (PoP) related to student awards. The chapter closes with discussions related to social justice issues and the areas of equity, diversity, and inclusion (EDI).

Positionality and Lens Statement

This section explains my personal agency, role at LYNU, and leadership approach. Providing both a personal and professional description of myself will add context to my adaptive-authentic leadership style and how it will guide the implementation of this OIP.

Personal Leadership Position

Over the years, I have met many accomplished students who have overcome incredible financial hardships while studying at LYNU. I have a deep affinity towards students who lack the financial resources to afford a post-secondary education, and I empathize with equity-deserving students who are trying to improve their situation. During my educational journey, I restarted my studies twice due to lack of money to pay for tuition which delayed the completion of my undergraduate degree by six years. I am a racialized female, entering Canada with my parents at the age of three. When we arrived, we had limited financial resources, did not speak English, and relied on community services for many years. As a first-generation learner, I relate to the challenges faced by students who lack the financial resources to pursue their post-secondary goals (Kim et al., 2021) and understand the pressures they face trying to

independently navigate the post-secondary system. My past experiences have prepared me to lead the changes being proposed in this OIP. I recognize that the university community may not be ready, or willing, for a major organization change relating to a revamped domestic undergraduate monetary award program, and I intend to leverage my networks within the LYNU community to coordinate key stakeholder discussions to start conversations about the change.

Roles and Responsibilities

At LYNU, I am one of six senior leaders working in the Registrar's Office who ensures the integrity and accuracy of student academic records and related student services (Duklas, 2014) across two campuses. My portfolio focuses on financial aid, registration, domestic undergraduate awards, bursaries, and non-academic student advising. This requires that I collaborate regularly with stakeholders from both campuses which include, but is not limited to, faculty advising offices, international student advising, graduate and post-baccalaureate programs, Indigenous communities, central finance, counselling services, and student recruitment. My role is one that requires exceptional relationship building skills and the ability to work with students, faculty, and community stakeholders. Being responsible for domestic undergraduate awards at LYNU and overseeing various award committees, positions me naturally to lead changes to award policies across both campuses.

Beliefs and Understanding

Customer service has been the nucleus of my career, and I have worked in student services at LYNU for the past 13 years. I believe helping people requires a coordinated effort between front-end advisors and back-office administrators to make effective impacts on students and the community (Zomerdijk & de Vries, 2007). Post-secondary education holds significant importance to students, especially those from equity-deserving groups who use education as the key to improving their lives by obtaining meaningful employment after graduation and earning money to change their family situation Scott-Clayton, 2015). Education is more than earning a credential, it is also social, emotional, and

academic learning that opens new opportunities and experiences (Osher et al., 2007), and the LYNU

community must work together to provide the best holistic experience for the student.

My values have been shaped by my experience serving others. I view helping people as an

honour, and not an obligation. In addition to my job working with students, each month I volunteer in

my local community working with children, collect donations of used clothing for redistribution, serve

on the board of directors of a non-profit association, and chair the British Columbia (BC) financial

advocacy association for fair student loan practices. I have a responsibility to improve the situations of

others and I use my position at LYNU to help students gain the most of their university experience.

Leadership Approach

My approach to leadership is guided by trustworthiness and care. It took many years for me to

realize that I must be true to myself, be faithful to my principles, and recognize my shortcomings. I often

surround myself with people that can show me different perspectives to provide balance to my

leadership style, and my genuine desire to help people is reflected in my actions. My concern for the

well-being of people and my ability to work through demanding situations guides my leadership

philosophy into two intersecting styles: adaptive and authentic leadership. The adaptive style is oriented

toward the engagement of complex challenges often seen in new concepts or issues that do not have a

conventional solution (Nicolaides & McCallum, 2013), and the authentic style applies an ethical lens to

the decision-making processes to increase chances of success (Atwijuka & Caldwell, 2017). When making

decisions, it is critical to prioritize relationships with people to quickly build a high degree of trust (Asad

et al., 2022), and communications must be professionally managed (Angela-Eliza & Valentina, 2018) for

conversations to be successful.

My position at LYNU requires managing diverse groups of people and leading major projects.

Decisions I make impact people and the community, and I must be mindful and considerate of my

choices (Starratt, 1991). It is about what I should do and what I should be like as a human being and

member of a society (Ciulla, 2009) which guides my leadership actions. I move between the adaptive and authentic leadership characteristics and apply each style as appropriate. There will be some situations where an adaptable leadership approach is more effective, while other times the authentic leadership approach will be more appropriate. My adaptable-authentic leadership style is now my competitive advantage and is the fitting leadership model to support the changes for this OIP.

Equity, Diversity, Inclusion, and Decolonization

The commitments outlined in the LYNU strategic plan focus on taking positive actions towards EDI practices, social justice issues, and decolonization efforts in support of student parity (LYNU, 2018). Creating equitable policies involves producing impartial processes to provide equal outcomes for everyone, acknowledging the diverse range of what makes every person unique, and making people feel a sense of belonging (Adediran, 2021). Decolonization can be recognized as a long-term process involving the bureaucratic, cultural, linguistic, and psychological divesting of colonial power (Smith, 1999), and non-Indigenous people must accept the reality of Canada's colonial history. Although improvements to EDI policies and decolonization practices have been made throughout both LYNU campuses, almost no attention has been provided to the awards policies.

LYNU award recipients are currently required to achieve a minimum academic standing each session to receive their award funding. If students do not meet the academic requirements, then their funding is lost and any remaining money from their award is forfeited. This is contradictory to LYNU strategic goals of attracting a wide range of students and removing financial barriers to equity-deserving groups (LYNU, 2018). Many of the awards are intended for students that demonstrate a high financial need in addition to strong academics, and the current award policies are not designed to recognize that students may perform poorly in an occasional course or are struggling in their transition from their move from home, both of which may impact their academic performance.

LYNU senior leadership publishes a separate action plan specifically in support of Indigenous initiatives which is aligned with the university strategic plan. In 2020, LYNU senior leaders updated the Indigenous strategic plan (LYNU, 2020) and incorporated specific goals in direct response to the recommendations from the Truth and Reconciliation Commission of Canada: Calls to Action (2015) report which investigated harm caused by residential schools to Indigenous communities. One of the intentions of this OIP is to support decolonization efforts identified in the LYNU Indigenous strategic plan (LYNU, 2020) which focuses on providing Indigenous students with tools for success and creating a holistic system of support. Decolonization in education works to unsettle colonial structures, systems, and dynamics (Poitras Pratt et al., 2018; Smith, 1999) and improvements to award policies will provide Indigenous award recipients with greater access to their funding by removing barriers currently in place.

There is much room for improvement with respect to EDI and decolonization efforts at LYNU, and work should begin where student award recipients will feel immediate benefits. Most student award recipients have a degree of financial need, and many are first generation learners, from rural locations, equity-deserving, or from marginalized groups (LYNU, 2021). LYNU award practices must treat award recipients fairly, which means student situations are individually considered and award recipients are provided with all the same access to opportunities and resources. My adaptive-authentic leadership style is the appropriate combination to help implement changes to the LYNU award policies and to help support people through changes.

Organizational Context

This section will provide a meaningful look into LYNU and summarize the political, economic, social, cultural, equity, and policy contexts. A description will be provided to explain the theoretical frameworks which guide LYNU practices and provide clarity that shape the culture and award programs at the university.

Organizational Frame

Located in the province of BC, LYNU is a research intensive, Canadian public post-secondary institution serving 60,000 to 70,000 domestic and international students, offering degree, diploma, and certificate programs across two campuses (LYNU, 2018). LYNU is a traditionally structured, top-down organization guided by a core leadership team consisting of faculty deans and senior administrators who work with students, faculties, and staff to form university goals. Figure 1 provides a simplified overview of the vertical hierarchy at LYNU, starting with the Chancellor (titular head of the university), and ending at my area of oversight (Student Support & Advising) for illustration purposes.

Figure 1

Limited Snapshot of LYNU Organizational Structure

Chancellor		
Board of Governors		Council of Senates
President & Vice Chancellor		
Provosts & Vice Presidents		
Vice Provosts & Deans		
Associate Vice President & Registrar		
Senate & Curriculum	Strategic Indigenous Enrolment Initiatives	Student Financial Management
Undergraduate Admissions & Recruitment	Student Records & Scheduling Management	**Student Support & Advising**

The Associate Vice President, Enrolment Services & Registrar (Registrar) oversees six primary areas within Enrolment Services, which includes the Student Support & Advising portfolio where domestic undergraduate student awards are managed. The Registrar must support any changes to

award policies, but I am responsible for the fiscal management and proper distribution of domestic

undergraduate awards, which is the area of focus for this OIP.

Senior leaders at LYNU have committed to reducing financial barriers faced by Indigenous, Black,

and other racialized students (LYNU, 2021). Monetary awards are used to attract academically qualified

students to attend LYNU from various backgrounds to increase the diversity of the student body, enroll

students with special talents, and increase students of colour (Hossler, 2000; Luna-Torres et al., 2019).

Students who accept their award offer and join the LYNU student population are governed by LYNU

award policies which requires them to meet two conditions each academic session (September to April).

First, the student award recipient must achieve or exceed 75% in each course they are registered in, and

second, they must be enrolled in a minimum of 24 percentage graded credits (approximately eight

courses) each session, to continue to receive their funding which is paid in equal installments over four

years. If a student does not meet one or both requirements, their award funding will be lost. Students

with disability-related accommodations or ongoing medical conditions are expected to meet the same

75% grading criteria for each course they are registered in but can be enrolled in less than 24

percentage graded credits each session.

In 2021, 14,000 to 15,000 domestic students studying at LYNU received government student

loans (LYNU, 2021). In addition, 3,000 to 4,000 students also received institutional non-repayable

funding to fill the gap between their assessed educational and living costs, and what was received

through government loans (LYNU, 2021). Awards provide financial assistance to thousands of students

at LYNU each year and require a significant amount of university resources (staff and technology) to

review academic eligibilities and coordinate the award payouts. Many university students indicate they

are concerned about their ability to pay for tuition and living costs (Fuller, 2014; Ganem & Manasse,

2011) and LYNU award policies are currently impeding many students from receiving their full award

funding. This is concerning since some award recipients have moved from more affordable parts of the

country to study at LYNU due to receiving an award, and losing their award could result in them having

to complete their studies at a different institution where tuition fees and housing costs are less

expensive than at LYNU.

Political and Economic Context

Improved access to post-secondary education can be gained through lower tuition and/or

increased financial aid, which can lead to higher enrolment among historically marginalized populations

(Hossler, 2000). Students typically expect tuition rates to remain the same throughout their studies and

want access to generous financial support, but they also insist on modern technology and reputable

professors in the classrooms which come at a significant cost (Busch, 2017). This pressures LYNU leaders

to take a neoliberalist approach and seek new financial income streams to secure private money given

that government funding of post-secondary institutions has not risen in real terms in almost 15 years

(Usher, 2022). Neoliberalist market-like competition has changed post-secondary education, in

undesirable ways (Busch, 2017), and growing student demands force LYNU leaders to continually seek

creative revenue streams. Efforts to increase revenue must not overshadow what is best for students,

and LYNU leaders must be cautious not to become dependent on income from sale of services and

fundraising efforts as they might not be a reliable alternate source of funding (Lang, 2005). Increasing

award funding at LYNU for equity-deserving students is one way to offset some of the critical comments

resulting from neoliberalist actions.

In 2019, the provincial student loan provider StudentAid BC, announced their commitment to

improving domestic students access to post-secondary studies by eliminating interest charges on all

provincial student loans (*Eliminating Interest on B.C. Student Loans: StudentAid BC*, n.d.). Shortly after in

2021, they created the British Columbia Access Grant to provide non-repayable funding to students at

the beginning of their program to help remove associated barriers to education (*New B.C. Access Grant:*

StudentAid BC, n.d.). These two initiatives help students access non-punitive options to money which can lead to program completion with the lowest amount of debt.

Social and Cultural Context

LYNU's bicameral governance structure has the senior academic body (Senate) running in parallel with the governing board, wherein they share responsibility for decision-making (Jones et al., 2004). Unlike most post-secondary institutions, LYNU governance operates under a separate Senate body for each of their two campuses. Having two Senates is beneficial to recognize the distinct cultures of each campus, but it can also create inefficiencies when Senate meeting schedules are not aligned, and decisions are not made in unison. Each Senate makes their own decisions, which can lead to different policies and practices at each campus, making it challenging for students especially if they transfer campus locations. Each campus is unique in their own identity, but both are driven by the goal of providing students with an excellent education and experience.

Equity and Policy Context

Created in 2005, the LYNU financial access promise stipulates that no domestic student enrolled in a degree-seeking program will be prevented from starting or continuing their studies at the university due to financial reasons alone (*Financial Aid Policy*, 2019). Under this policy, students who experience a funding gap between their assessed need and current situation would be provided with non-repayable funding by the university to bridge the difference. Many students do not qualify as they are unwilling or are unable to obtain government or private loans or may not want to ask for help from family due to the shame attached from fear of exposure and general stigma around financial aid (Peterson et al., 2022). Although the intention of the policy is to help students access education, many students do not realize they must first exhaust all other sources of funding before qualifying for non-repayable university funds.

Offering students award funding, and then stripping it away when their academic performance does not meet institutionally set criteria is a punitive reaction and can place students into unnecessary

financial hardship. The current LYNU award policies are counterintuitive to their own financial access promise, and students who lose their award funding when they do not meet the conditions of their award, will often be subsidized from other university funds under the LYNU financial access promise.

Theoretical Frameworks

The LYNU strategic plan outlines core themes which include being a model place to learn and work, partnering with Indigenous communities to address the legacy of colonialism, and building a diverse culture that integrates innovation, collaboration, and inclusion (LYNU, 2018). To apply these goals to the monetary award policies, I must ensure there is a solid theoretical paradigm to support leadership and overall organizational change. Paradigms are a shared world view that represents the beliefs and values in a discipline, and guides how problems are solved (Schwandt, 2015). I recommend drawing on multiple paradigms to show different perspectives (Urick, 2012), which can highlight contrasts and provide a more fulsome picture (Schultz & Hatch, 1996). For this PoP, combining the functional and critical paradigms will provide the best structure to support the organizational change.

Functionalist Paradigm

LYNU has been in existence for over a century and runs efficiently by providing stability and structure for large groups of people. A functionalist paradigm "maintains the status quo, social order, consensus, social integration and cohesion, solidarity, need satisfaction, and actuality" (Milam, 1991, p. 655). The LYNU award programs currently operates within a functionalist model where award managers are encouraged to think and act similarly which results in high levels of efficiency, but it has not empowered people to challenge the status quo (Burrell & Morgan, 2011). If LYNU award processes continue to operate within a purely functionalist model, it would maintain productivity levels, but will eventually experience consensus bias where it fails to account for social change (Loy & Booth, 2006; Morgan, 2006). The LYNU award program cannot continue to operate under a traditional one paradigm

model and must look towards modern ideas to support EDI and social justice practices to benefit students.

Critical Paradigm

A critical paradigm is "particularly concerned with the issue of power relations within the society and interaction of race, class, gender, education, economy, religion, and other social institutions that contribute to a social system" (Asghar, 2013, p. 3123). It is an alternative paradigm focused to criticize and justify the existing situation, and encourage people to seek alternatives, update practices to remove historical barriers, and advance social justice issues (Asghar, 2013). The university community needs to feel empowered and safe to question existing award policies. Many policies are currently misaligned with university goals, and the critical paradigm will provide an opportunity to motivate people to challenge the status quo and bring contemporary award issues to the forefront.

Multiparadigm Approach

Despite the complexities of applying a multiparadigm approach, I am confident that using multiple frameworks will be the most effective approach for this OIP. By utilizing both a critical and functionalist approach, I can support challenges to the status quo within current award policies and leverage the existing functionalist framework to maintain current processing workflows. The functionalist paradigm encourages efficiency and ensures workers are clear on what they are supposed to do (Serpa & Ferreira, 2019), and the critical paradigm will keep people curious and inspire them to question historical practices (Asghar, 2013).

Keeping only to a functionalist paradigm can prevent LYNU award managers from seeing changes happening around them as they are too focused on maintaining order (Loy & Booth, 2006), as people often do the same thing without question because that is how it has always been done (Holmwood, 2005). Applying a critical paradigm will help award managers be conscious of things that may need changing since common values and beliefs tend to discourage change (Lessnoff, 1969). To

address the PoP, the entire LYNU awards community must work together to achieve a steady state once

changes have been implemented (Kingsbury & Scanzoni, 1993), and combining a functionalist and

critical paradigm will help the university community identify what needs to be changed, and quickly

make it into the new practice.

Vision and Values

My vision for LYNU would be to modernize current award policies and sever funding from

academic performance. The current procedure of using academic performance to determine if students

are eligible to receive their award funding is a frequent practice at many Canadian post-secondary

institutions (Rouf, 2019). Some members of the university community will consider my vision too radical

and risky, and will not support the idea to dissociate academic requirements from awards. Community

members may have unsubstantiated concerns about students not completing their program within

traditionally sanctioned time limits or worry that LYNU awards will be less prestigious without academic

requirements. I am confident that existing academic policies will keep LYNU students on track to

graduate in a timely manner and performing at a competitive standard (Wright, 2019), and would

remind concerned community members that there are already several prestigious Canadian awards

offered through private organizations which do not tie funding to academic performance.

The Beedie Luminaries Scholarship (*Beedie Luminaries Scholarship Program*, n.d.) and the

Schulich Leader Scholarship (*Schulich Leader Scholarships*, n.d.) offers high-value awards between

$80,000 to $120,000 to students across Canada. The majority of LYNU students receiving either of these

awards graduate in a timely manner and remain academically competitive throughout their four-year

undergraduate degree without being held to any conditions. Both award programs do not require

students to maintain minimum grades or credit loads, and instead, encourage students to create their

own post-secondary experience. This is the vision I have for the LYNU award program.

Leadership Problem of Practice

LYNU award policies have remained unchanged for about three decades and do not reflect student award recipients' current needs. The problem that needs to be addressed is how to remove barriers within the awards policies for students to access the full amount of the award they were originally offered. Applying Wood and Hilton's (2012) ethics of care framework to this PoP highlights the requirement for institutional accountability at LYNU to ensure commitments made to accessibility, EDI, and decolonization efforts are applied to the awards program.

Using an ethics of care framework includes collaboration with students and other stakeholder groups to ensure that policies created for the LYNU award program are guided by trust, compassion, and understanding (Wood & Hilton, 2012). Post-secondary education governance has been experiencing major changes, with moves from a top-down approach to a bottom-up approach (Shin & Harman, 2009), thus benefitting the LYNU award program by shaping policies through stakeholder consultation and student feedback. The critical paradigm will help encourage people to ask questions and my adaptive-authentic leadership approach will fit well with the ethics of care framework to maximize student support.

The PoP that will be addressed is the lack of access to award funding promised to LYNU student award recipients at admission, due to stringent academic progression requirements. My role from within the Registrar's Office oversees the administration of monetary awards, while formal policy changes are approved at the Senate level. Many award managers lack experience working with equity-deserving students and are unfamiliar with how finances impact student well-being, which can make them oblivious to changes needed within award policies. While awards can provide financial aid to some students, the ability to afford post-secondary is still a major barrier for most (Long, 2008), and the current award policies are not aligned with the LYNU strategic plan to improve student access to education (LYNU, 2018). Provincial and federal government student loan providers recognize that

students are carrying increasing levels of debt and have recently made positive changes by eliminating interest on loans (StudentAid BC, n.d.-a). This prompts me to ask what changes can be made to the LYNU monetary award policies to help students access the total award funding they were promised? The goal of this OIP is to incorporate equitable practices to the award program and close the gap between the money student award recipients were promised when they received their award offer, and truly receiving all the money they were intended.

Framing the Problem of Practice

This section describes the historical and current state of LYNU, organizational frameworks, and theories that will help supply a more fulsome narrative of the PoP. A metaphor will be presented to help explain how monetary awards are used, followed by a PESTE (political, economic, social, technological, environmental) analysis to conclude this section, and explain the positionality of this PoP.

The Need for Change at LYNU

Approximately 30 years have passed since a meaningful change was made to the undergraduate monetary award policies at LYNU. Awards often provide students with a substantial amount of money ranging between $10,000 to $80,000 (paid in equal installments over four years) to help students pay for tuition and costs of living. Award funding reduces financial pressure to students and their families, while also decreasing the need for students to take on part-time employment or student loans to supplement their income (Daun-Barnett et al., 2013). The current policies governing LYNU awards may prevent many students from accessing the full value of their award due to outdated policies, and this is unintentionally creating barriers for students.

History

For decades, the Registrar's Office at LYNU functioned similarly to many other large post-secondary institutions. Traditional student services would be divided into operational areas where admissions, financial aid, registration, and awards all operated under individual silos (Lauren, 2006).

Each office would specialize in their own area, and infrequently work together to provide students with a holistic experience. Ten years ago, the LYNU Registrar's Office transformed their student services model to amalgamate the areas of student financial aid, undergraduate awards, student loans, registration, tuition, prospective student advising, and general non-academic advising into one office, which is administered by a team of professional advisors. I lead this student service unit, named Student Support & Advising (SSA), and this new student service model provides me with a complete view of student financial services, especially how monetary awards impact overall student welfare.

A key area of responsibility within my portfolio is undergraduate domestic awards which are managed by SSA advisors, who also function as award managers. I am accountable for the work performed by 47 full-time SSA advisors and the tasks within the awards portfolio which include academic progression decisions, auditing, policy advising, and policy enforcement. In addition, I oversee the award appeal process should students want to challenge the loss of their funding. A considerable amount of effort is required by award managers to review appeals, and students need to obtain supporting documentation such as medical notes and faculty letters of support to submit an appeal.

Historically, awards are offered to top performing students who come to university directly from high school. The current award policies were designed to keep students academically competitive throughout their studies to ensure exceptional academic performance until completion of their program. When award policies were originally created, there was no consideration provided to students who may experience a setback, require various levels of support, or acknowledge any EDI practices. Today, many awards are being offered to top performing students who also demonstrate financial need or come from equity-deserving groups.

Social Justice Context of the Problem of Practice

LYNU is committed to inclusivity, focused on social justice issues, and in service to a diverse stakeholder group (LYNU, 2018). The culture at LYNU uses the principle of vertical equity, where

resources are not always allocated equally, and greater resources are directed towards those with greater needs (Berne & Stiefel, 1994; DesJardins, 2002). When introducing changes that address social justice and equity, I must be inclusive and transparent and I must use my adaptive-authentic leadership style to show respect to historical LYNU award policies, be patient when working with others, and sensitive when answering questions from stakeholders.

The PoP highlights gaps within current award policies at LYNU and questions the alignment of the purpose of awards and improving access to equity-deserving students. It is meant to challenge the current award policies which can be seen as barriers to students and create a pathway to progression while dismantling scarcity models. Access to post-secondary is often considered a scarce commodity since it has historically favored people who had time, money, and could learn effectively within the traditional educational model (Smith, 2011). Some people believe that to fully achieve social justice, post-secondary education should be free to everyone, but recognizing that this might never happen, focusing efforts on equity-deserving student groups and paying for their education is an excellent first step (Sabzalieva et al., 2022). Prioritizing access to monetary awards to those who are constrained by social and economic forces, and applying equitable practices to awards is the focus of this PoP.

Metaphor: Monetary Awards vs Sports Team

People who do not work with monetary awards often misunderstand the intent and policies that guide them. Comparing awards with a more commonly understood concept can make the awards program more relatable. Using a professional sport team analogy, it will show how top athletes are recruited by major sport organizations through multimillion-dollar contracts. These organizations expect the athletes to perform well and help them win major sport titles. Similarly, many Canadian post-secondary institutions recruit academically excellent students using high value monetary awards to attract them to study at their institution. Athletes and students are held accountable for their performance and must satisfy the conditions of their contract to receive their money. Referring to Table

1, I summarize the similarities between monetary award programs at LYNU and professional sports team management. This comparison identifies the aggressive recruitment techniques of both organizations, and the punitive nature of their practices. Using this information, it highlights where improvements can be made to LYNU award policies to differentiate student award practices from athletic contracts.

Table 1

Sports Team and LYNU Award Program Overview

Category	Professional Athletes	Monetary Award Recipients
Recruitment	Sports teams look to fill key roles such as defense, offence, etc. and will recruit athletes that prove superior physical abilities directly from high school.	LYNU awards are used to attract top student from various student groups (e.g. Indigenous communities) directly from high school.
Legal	Sports contracts are legally binding.	Monetary awards are regulated under LYNU Senate policies.
Performance	Athletes are expected to score goals, perform well, take the team to championship levels each season.	Award recipients must achieve competitive academic grades and maintain a full-time credit load.
Conditions	Athletes who do not excel can be cut/traded from the team. There are behavior clauses requiring athletes to adhere to laws and act appropriately.	Students who do not take the required minimum number of credits, and/or do not meet the required GPA will have their funding rescinded.

PESTE Analysis

A PESTE analysis is a management framework and diagnostic tool that focuses on the macro levels of the organization, specifically the political (P), economic (E), social (S), technological (T), and environmental (E) factors (Zalengera et al., 2014). The outcomes of the environmental scan will help identify factors external to LYNU which can directly or indirectly impact award strategy decisions.

Political

  Provincial and federal government decisions impact student access to post-secondary, and in the province of BC, there is inconsistent government support especially for Indigenous students. Approximately 50% of BC post-secondary institutional funding comes from government sources (Ivanova, 2012), and while many government programs are intended to encourage students to pursue education, tensions often arise due to government cutbacks for Indigenous student funding. Many Indigenous educational initiatives are short term and lack any partnership with post-secondary institutions to ensure initiatives are sustainable (Henry et al., 2017; Pidgeon, 2016). LYNU leaders must keep informed of any new priorities which might influence student decisions to start their studies, and pay particular attention to factors which do not properly support Indigenous student needs.

Economic

  Looking at the economic forecasts of BC, unaffordability continues to be the theme for the province with no relief in sight. The prohibitive costs of living, increased prices on food, and lack of housing are significant issues (Routledge, 2023). Despite efforts to improve student access to funding, financial need is still high and applications for awards outnumber the actual awards available to students (LYNU, 2021). To help improve student affordability, interest on all BC government student loans have been eliminated since February 19, 2019 (StudentAid BC, n.d.-a), and the Government of Canada has abolished the accumulation of interest on all federal student loans effective April 1, 2023 (National Student Loans Service Centre, 2023). At the time of this writing, the federal student loan weekly funding maximum increased for single students from $210 to $350 (Employment and Social Development Canada, 2022) to help offset increases to costs of living, and it was recently announced that effective August 1, 2023, BC student loans will permanently double the weekly loan funding amounts from $110 to $220 for single students (StudentAid BC, n.d.-b). Interest free loans and increases

to loan maximums, can improve domestic student access to funding needed to attend post-secondary, but it still falls short of what most students need to complete their program.

Social

There is a wide range of students studying at LYNU, with many students coming from wealthy families who do not require financial assistance, but there are also approximately 3300 others who access a combined $28 million each year in non-repayable, needs-based bursary funding (LYNU, 2021), and even with support from LYNU, the funding is not enough. Females account for 60% of the LYNU student population and tend to access financial aid through both LYNU and the government more frequently (Todd, 2017). Funding from awards is meant to help remove barriers that prevent students from accessing post-secondary education, and prioritizing awards for equity-deserving student groups can help create a more equitable experience.

Technological

In 2023, LYNU is implementing a new student systems platform to replace the current 40-year-old system. All aspects of student, faculty, and staff work will be impacted which will drastically change the processing of student awards. The new platform will provide students with greater access to features such as secure document uploads and seamless data sharing from external sources. This will reduce the amount of physical documentation required, decrease dependencies on spreadsheets, and provide award managers with a holistic view of student financial profiles which can be used for more fulsome program advising.

Environmental

Increased awareness of climate change issues, especially the burning of fossil fuels, is creating unfavorable public opinions of post-secondary investment decisions which is pushing LYNU senior leaders to consider divesting their endowment funds from fossil fuel companies. If LYNU investments are considered socially and environmentally irresponsible, it can damage the reputation of the university

and negatively impact donations to the university (Charrois, 2018). Many awards are funded through the generosity of donors, and they expect LYNU to be ecologically sensitive at both campuses (LYNU, 2018) and sustain their pledge of protecting the ecosystem around them.

Internal and External Data

LYNU financial reports show that in 2020, approximately 30,000 students received a form of financial aid including loans, bursaries, and/or a combination of awards totaling $392 million ($90 million dedicated to awards), which is a 15% increase over the previous year (LYNU, 2021). In the same year, the total amount of student loans owed to the federal government surpassed $22 billion which is the legislated ceiling set by the Canada Student Financial Assistant Act (Canadian Federation of Students, 2021). Fundraising efforts at LYNU have been extraordinarily successful ($150 million in new donor funding in 2020/2021) but student financial need continues to outpace award budget increases (LYNU, 2021). This information provides a snapshot of the growing debt taken on by students and continued unaffordability associated with post-secondary education and costs of living.

Approximately nine years ago, LYNU leaders implemented an online student alert system which provides faculty and staff the ability to discretely identify students who demonstrate changes to their behavior such as constantly being late for class or show indications that something is not well. When students are experiencing difficulties, their academic and personal performance is negatively affected (Dagdag et al., 2019) which can create inequity if not addressed. Looking at internal unpublished data collected by LYNU administrators, the three most frequently reported student concerns are related to wellness, academic, or financial emergencies. Appendix A shows the number of instances when LYNU students were reported through the online alert system between 2015 and 2021. It shows financial situations as the top reported instance of concern.

Guiding Questions from the Problem of Practice

During the development of the PoP, some questions have appeared which encourages me to examine if LYNU award policies are misaligned to university strategic goals, and unintentionally creating obstacles for students to access their award funding. What inspired me to explore if LYNU award policies create equity, are free of barriers, and incorporate EDI and social justice practices was the information gathered through the award appeals process. In the next section, student appeal data will provide information which prompted my initial curiosity and led me to further examination.

1. Are LYNU award policies creating barriers for student award recipients to access their award funding?

Students who accept their award offer are automatically bound to the terms of the award, which state that if they do not meet GPA and credit load requirements, their funding will be lost. If a student loses their funding, they could be forced to drop out of their program at LYNU, return home, apply to a more affordable university, take on unplanned debts through loans, or obtain employment to help fund their own studies. Students must achieve a minimum GPA of 75% in each class and take at least 24 percentage-graded credits (less for students with a registered disability) between September to April, as courses taken between May to August do not count towards the credit requirements for award purposes (*LYNU Campus-Wide Policies and Regulations*, n.d.). Any variation to either condition results in students losing their remaining award funding.

2. Do the monetary award policies reflect current commitments to EDI and social justice issues as outlined in the LYNU strategic plan (LYNU, 2018)?

The monetary awards policies at LYNU have not been reviewed or updated in over 30 years, and no consideration has been made to ensure student award recipients are treated fairly or are being provided with supports for them to have access to the same resources and opportunities as others. The policies that govern monetary awards have not kept up with desires to reduce the gap of marginalized

groups due to the vast disparity between the rich and poor. The award policies currently in place as they are written are often a barrier to students and their success.

<div align="center">**Leadership Focused Vision for Change**</div>

As the change leader for this OIP, it is essential that I research a variety of options and understand potential impacts of proposed changes to monetary awards. As an adaptive-authentic leader, I need to anticipate the effects of the change and how to support people through the transition. I want to see changes to the monetary award policies that will improve access to funding for students, reduce or close the gap between current award policies and equitable practices, while improving efficiencies for award managers.

Current State

Student award recipients have been promised a set amount of money to help cover tuition and costs of living, which is paid in equal installments over four years. Students who fail to meet the minimum academic requirements tied to their award will lose all remaining money in subsequent years. Some students may have exceptional circumstances and can submit an appeal to keep their funding despite not meeting academic requirements, but it can take up to eight weeks for an award appeal to be decided due to the volume and complexity of appeals to be reviewed.

Vision for Change and Future State

My inspiration to make changes to the award policies at LYNU is driven by data from student award appeals. Appendix B shows a breakdown of award appeals, and on average, 90% of student award appeals are successful and the student keeps their funding. Further review of the data shows there are three common appeal scenarios: medical, special student groups, and compassionate reasons. Medical appeals related to hospitalization are usually approved given their unexpected circumstances. Appeals from special student groups are also approved since most of these appeals are from equity-deserving students facing unique challenges. Compassionate appeals can be for various situations, with

the most common case being the student felt overwhelmed and took a lighter credit load on the recommendation of their counsellor. The end results show that each year, less than 10% of students lose their award funding through the appeal process.

Regardless of if the award appeal is approved or denied, each student appeal is carefully reviewed by three award managers. A unanimous decision must be reached on all student appeals, and if a consensus cannot be reached, the appeal will be reviewed by a senior leader, usually me, for a final decision. The future state would see EDI practices incorporated into LYNU award policies and a significant reduction of administrative work, which would demonstrate understanding to individual situations without requiring students to undergo a formal appeal process.

Priorities for Change and Leadership Levels of Support

As the change leader for this OIP, I will need a strong and strategically selected team of committed people from both campuses to help me advocate for changes to LYNU award policies. The two-Senate model at LYNU will require that I coordinate efforts at each campus, and then bring both campuses together to launch the changes simultaneously. The people I approach must have a certain amount of authority and influence across both campuses and in their communities. If I select people who cannot project confidence or are unable to persuade others about the need for change in award policies, it can lead to years of delay or even complete failure of my proposal. I require a team of forward-thinking leaders who believe that current LYNU award policies are outdated and require a complete transformation that includes the application of a social justice lens.

Table 2 provides the rational for the strategic selection of leaders to help move my change priorities forward. Each level of leadership support will be reviewed on a micro, meso, and macro level to provide a complete overview of the support model.

Table 2

Key Change Priorities and Leadership Support

Level	Change Priority	Leadership Support
Micro	Speak to individual Deans and Program Directors about the proposal to change monetary award policies. Listen and predict immediate concerns that could derail conversations early.	Use of direct one level above leadership such as Provost/Vice-Provost to speak with Deans and Directors. Another option would be to recruit one or two established faculty Deans to act as advocates.
Meso	Speak with current and past student award recipients – especially key student groups (e.g. Indigenous students) asking for input on proposed changes to monetary award policies.	Approach student leaders (e.g. student senators) to help facilitate conversations with student groups. Ensure there is a subject matter expert to explain how changes will impact student awards.
	Reach out to local and national educational leaders to discuss the benefits of changing monetary award policies. Help alleviate concerns other institutions may have about removing academic requirements from awards.	Have a high-level university administrator (e.g. Registrar) officially support the proposed changes and to speak to the reduction of administrative barriers to students and decreased workload for award managers and faculty members.

Equity and Social Justice Priorities

The number of monetary awards offered to LYNU students has increased in recent years to help improve access to post-secondary education for equity-deserving students (LYNU, 2021). LYNU award selection committees have been restructured to intentionally include Indigenous and racialized scholars, and training is needed before serving on award committees to address unconscious biases and cultural misconceptions. Unconscious bias draws on personal, social, and historical experiences as well as references from our families, the media, and in daily life (Henry et al., 2017), and all award committee members must be aware of their personal prejudices. In alignment with my adaptive-authentic leadership style, my priority is to ensure that students are treated in an equitable manner and systemic

barriers are removed from existing LYNU award policies. Monetary awards can help students facilitate this type of success, but the process must prioritize EDI practices and eliminate barriers for students.

Chapter 1 Summary

This chapter describes the current state and organizational context at LYNU while illustrating the challenges faced by students receiving monetary awards and highlighting where there is a disconnect between LYNU strategic goals and current award policies. Using guiding questions and a PESTE analysis, it helps to provide a broad view of micro, meso, and macro level influences that must be considered before change can be promoted to the monetary award policies. Money affects a student's socioeconomic status and academic achievement (Luna-Torres et al., 2019) and ensuring equitable award policies and processes will provide LYNU award recipients with a level playing field and equal access to opportunities. In Chapter 2, I will show how my adaptive-authentic leadership style supports approaches to change, review multiple change frameworks, and assess organizational change readiness in support of the PoP.

Chapter 2: Planning and Development

Chapter 2 builds from Chapter 1 and moves into deeper discussions to address the PoP. The

chapter begins with a breakdown of my adaptive-authentic leadership approach, followed by a

comprehensive review of my selected change frameworks which will explain how it will focus supports

to people and award processes. Two organizational change readiness assessments will be analyzed to

ensure that the LYNU community is ready for change, which will lead to a full review of the

recommended solutions through an ethical lens.

Leadership Approach to Change

Leadership is a concept that is difficult to describe due to its dynamic nature (Dartey-Baah,

2015; Klingborg et al., 2006), but leadership is frequently credited when projects succeed or blamed

when things fail (Crawford et al., 2020). My understanding of leadership is developed from my personal

experience of leading others and of being led. All leaders have good qualities, but they must be the right

fit for the team they are expected to lead, and only a small number of leaders can lead in any situation

(Vroom & Jago, 2007). My adaptive-authentic leadership approach empowers me to be a practical and

personable leader who ensures work is completed, while simultaneously helping people feel satisfied in

their job especially during times of change. I can help people manage the pressures, uncertainties, and

setbacks unavoidable during times of change (Cascio, 2003; Dinwoodie et al., 2015) which is critical in

my role within the Registrar's Office.

Adaptive Leadership

Adaptive leadership mobilizes people through a leader-follower approach in which the leader

encourages the follower to tackle tough challenges and emerge triumphant (Heifetz et al., 2009; Useem,

2010). It is a practical leadership model that supports people and organizations, and helps them adapt

and thrive in challenging situations (Joy, 2020). I see myself as an adaptive leader and demonstrate my

ability to see the bigger picture while leading my team through complex problems. I protect the ideas of

marginalized people within the organization by listening carefully to the views of those lacking authority (Northouse, 2019). I prioritize ongoing consultations with equity-deserving stakeholder groups when reviewing LYNU award policies, as current policies do not reflect their voices due to the absence of a fulsome review of award policies in over three decades.

There are three categories of challenges within the adaptive leadership model: technical, technical and adaptive, and adaptive. Technical challenges have a clear problem definition and can be resolved using existing methods, tools, and the exercise of traditional authority, while adaptive challenges require unlearning old assumptions and attitudes and learning new ways of knowing, doing, and being (Nicolaides & McCallum, 2013; Torres et al., 2012). Understanding these features will help leaders anticipate challenges throughout this OIP and support people when changes occur.

Technical challenges can be clearly defined and easily resolved by the leader (Heifetz & Linsky, 2011; Sunderman et al., 2020). At LYNU, an example of a technical challenge would be to eliminate the practice of students providing medical documentation when they submit an award appeal package. This practice could easily be changed under my authority within the scope of the Registrar's Office. If students do not need to submit medical documentation for appeals it would reduce effort for the students and improve appeal processing timelines, which could also help relieve pressure on the overall medical system by not requiring students to book doctor appointments to obtain notes.

Challenges which are both technical and adaptive are ones where the problem is easy to understand but the solution requires more than just the involvement of the leader (Muluneh & Gedifew, 2018a; Sunderman et al., 2020). This OIP provides a problem that is both technical and adaptive, whereby the community is aware of the challenges students face being governed under the award policies, but still insists on holding students to academic requirements. Any changes to award policies must involve cooperation from students, faculties, and staff to ensure it is holistically reviewed before it can be successfully passed through the Senate committee.

Adaptive challenges are problems which are not clear and cannot be resolved by expert knowledge and management alone, and instead require people beyond the leader to find a solution (Heifetz & Linsky, 2011; Sunderman et al., 2020). An example of an adaptive challenge at LYNU would be to examine why academic and credit load minimums must be tied to award funding, and why these policies have remained unchanged for over 30 years, despite updates to overall university priorities to help provide access to under-represented student groups. This would require reviewing historical documents to explain the original decision-making process, consulting with multiple campus stakeholders, and speaking with nontraditional stakeholders such as EDI advocacy groups to gain different perspectives. Being aware of the distinct types of adaptive leadership challenges will help me predict questions and have well thought out answers ready when speaking to the university stakeholders and community groups to gain their support to change award policies.

Authentic Leadership

I also see myself as an authentic leader as I am deeply aware of how I behave and think, am mindful of how I am viewed by others, and have high moral character (Avolio et al., 2004; Ford & Harding, 2011). It is critical for me to convince key decision makers that improvements must be made to the LYNU award program, and my authentic leadership approach is critical to its success given the complex emotions often tied to student financial matters. One of the most important aspects of this change process is to transform how people think and challenge the status quo, which requires that I understand how to leverage the key features of an authentic leader.

Authentic leaders focus on the creation of meaning for everyone, including themselves, through self-awareness (George, 2003; Waite et al., 2014). There are five dimensions of authentic leadership: (a) purpose, (b) values, (c) relationships, (d) self-discipline, and (e) heart (George, 2003; George & Sims, 2007;) and I must be able to move seamlessly through all these dimensions and apply them appropriately when leading the change.

Purpose

Authentic leaders have purpose, know what they are about, and will show their passion for the work they are doing (Avolio et al., 2004; Crawford et al., 2020; Northouse, 2019). In my role, I regularly advocate for students, helping to correct and resolve systemic issues at LYNU. An example of this was when I removed the requirement of having students supply names of non-familial references on their award application. For years, this presented as a barrier especially to Indigenous students who I noticed would abandon their award application when they were asked to provide references. When I spoke to Indigenous students as to why they did not complete their award application despite starting it, I learned that it is common for Indigenous students to work for family members, and it was challenging to find non-familial references because they were from a small close-knit community. Using this information, I updated LYNU award practices to allow anyone to act as a reference on award applications to help improve access to awards for all students, which removes barriers and reflects more equitable practices.

Values and Relationships

Authentic leaders have values, know what they are, act in accordance, and do not compromise on those values (Avolio et al., 2004; Ford & Harding, 2011; Northouse, 2019). I am a highly principled leader guided by social justice ideology, which means that I do the right thing based on the student situation. If a student's situation feels unjust, I will speak with the student directly and ensure they have an opportunity to tell me their story, and work towards an agreeable solution. As an authentic leader, I build relationships with people around me and understand my audience (Avolio et al., 2004; Iqbal et al., 2019). I frequently use anecdotes and share first-hand experiences to help explain the award process to students and will personally communicate unsuccessful award appeal decisions to ensure students can ask questions. Acting in a respectful manner and communicating with students directly is a fair and considerate thing to do.

Self-discipline and Heart

Self-discipline gives authentic leaders the grit to overcome challenges and setbacks to achieve their goals, but they also have heart, which is reflected in their compassion and willingness to help others (George, 2003). When I make decisions on student award appeals that do not have a unanimous decision, I endeavor to understand each student situation and take into consideration all exceptional and extenuating circumstances to render a fair decision which is based on facts, data, and empathy. On occasion, there will be student appeals which are unsuccessful that result in the loss of their funding, and as an authentic leader, I ensure that there is transparency in my decisions which are made without bias.

Blended Leadership Approach

My combined adaptive-authentic leadership approach will be the key to the successful implementation of this OIP. My position within the Registrar's Office and my authority overseeing domestic undergraduate awards places me in a strong position to challenge long standing award policies at LYNU. Utilizing adaptive leadership traits to find innovative ways to deal with unfamiliar problems and opportunities, but also incorporate elements of authentic leadership to influence people and help them through times of change will be extremely beneficial when trying to transform opinions towards historical award practices. Bringing together adaptive and authentic leadership aspects is critical when challenging the status quo, as the benefits of the change may not be immediately obvious (Yukl & Mahsud, 2010). Using an adaptive-authentic leadership style will focus support on helping people through the change process and mobilize the team to deliver on solutions (Bagwell, 2020). My leadership approach will display my moral character and commitment to helping people transition to a new way of doing things, while moving the university seamlessly through the change process.

Framework for Leading the Change Process

Most major change initiatives generate only lukewarm results and some fail miserably due to leaders not realizing that transformation is a process, not an event, and must advance through stages that build on each other over time (Kotter, 2006; Muluneh & Gedifew, 2018; Schatz, 2019). The absence of an effective change framework is a major reason for change initiative failures, and many change frameworks can be contradictory and confusing in their theory and approaches (Burnes, 2004 as cited in Hossan, 2015). Selecting the appropriate framework to support a major change to LYNU award policies is critical to its success, and it is imperative for me to remember that change will impact each project, person, and stakeholder group differently. Changing award policies will be complicated due to the large number of stakeholders that will require consultation, and as mentioned earlier, the LYNU community faces an additional complication due to the concurrent launch of a new student system platform on both campuses which will result in increased staff anxieties, new methods of recording information, and the potential for overall change overload.

LYNU is one of Canada's largest universities and institutional wide change initiatives must consider the impact at three levels: individual, organizational, and enterprise (Smith et al., 2020). Individual change requires transitioning people successfully and helping them manage how they experience change and working them through any attempts of resistance (Jalagat, 2016). Organizational change focuses on project implementation and must identify groups impacted by the change to successfully support their transition (Pinto & Slevin, 1997). Enterprise change is the most complicated, but also the most important as it solidifies the changes to LYNU structures, policies, and processes (Dzwigol et al., 2019). Once a change culture is imbedded at the organizational level, future changes will be accepted more quickly and effectively (Smith et al., 2020) which can help lower resistance for future instances of award policy adjustments.

Leaders should consider change from more than one perspective and manage both the what

and the how (Nadler & Tushman, 1989). "The what concerns the content of the change: what strategies

and elements of organization will have to be changed to enable the organization effectively to

anticipate, respond to, and even shape the challenges to come" (Nadler & Tushman, 1989, p. 197), while

the how addresses the manner it will be done (Mosadeghrad & Ansarian, 2014). I must be very selective

with my messaging and implementation plan to ensure they do not confuse the community or cause

change fatigue. I must also be ready and willing to address any dissatisfaction with decisions that I

present, despite my well-intended efforts. The hierarchy structure at LYNU places a group of senior

leaders in the position to make critical decisions for both campuses, and the triangle shaped top-down

model reinforces the positionality of the senior leaders and provides legitimacy to change decisions

being made (Archer, 2009). Having a smaller core leadership team can be beneficial since it can speed

up decision making, but it can also lead to criticism from students, faculties, and staff who may feel

excluded from the decision-making process. The appropriate frameworks for leading change should

support fluid movement back and forth throughout the change process while ensuring there is support

to the emotional needs of people. For this OIP, Lewin's (1951) change management model combined

with the Bridges' (2009) transition model have been selected to help achieve these goals.

Lewin's Change Management Model

The key to resolving social conflict is to "facilitate planned change through learning, and so

enable individuals to understand and restructure their perceptions of the world around them" (Burnes,

2004a, p. 311). Important change initiatives must include awareness of cultural assumptions, and to

enrich the learning, I must understand how to work across multiple cultures and understand why

involving people is critical to any change process (Barker & Gower, 2010; Schein, 1996). Lewin's (1951)

change management model (LCM) focuses on helping people manage change and separates the change

process into three stages: unfreeze, change, and refreeze.

Unfreeze

At the unfreezing stage, I must thoroughly prepare for discussions related to the possible changes to award policies by first analyzing current processes and policies to accurately understand what needs to be changed to achieve the intended results. I will also need to speak to award stakeholders to learn what is not working well for students and administrators. LYNU students, staff, and faculty need to be educated about why change is necessary as the more people believe that change is needed, the more motivated and engaged everyone will be (Brauns, 2015; Page & Schoder, 2019). At this stage, it will be critical for me to communicate what to expect and advise of impacts to address uncertainties. Identifying key stakeholders across both campuses and having answers for both strategic and operational level details will help me build confidence amongst the community about changes to award policies. I will present award data, student testimonials, and academic literature to demonstrate how EDI practices can be applied to awards in a sustainable manner, and how it would benefit students and the university.

Change

The change stage is when implementation occurs and all the change recommendations for award policies are applied and moved to practice. This continues to be a critical time for me to ensure communications to stakeholder groups are reinforced, and successes and challenges are shared in a transparent manner to keep the entire community engaged and involved in the process. All critical change leaders at LYNU will need to help communicate key priorities and convey a compelling vision of the change process, sharing how life will look like after the implementation to help people visualize the end goal (Deszca et al., 2020). The change stage can be the most challenging for people because familiar ways will have ended, and new unfamiliar practices have started (Cascio, 2009; Page & Schoder, 2019). I will need to be watchful for harmful behaviors such as meaningless criticism, which can be disruptive to the progression of the change.

Refreeze

In the refreezing stage, the new award policies become the norm. I will be diligent in developing targeted strategies to keep communications channels open throughout both campuses and be responsive and thoughtful when addressing concerns. Any questions I answer will need to address the specific problem the person is asking and I will need to demonstrate empathy towards people. During this time, anyone with questions or concerns can connect with me directly and I will ensure they will be given my full attention.

Stability amongst the university community will help ensure that the new behaviors are safe from regression and effective change must be achieved as a group to sustain and reinforce the changes to individual behaviors (Burnes, 2004a). At this stage, I must demonstrate that I am willing to listen and ask questions, and will need to carefully observe and document how the new award policies and processes are being received by students, faculties, and award administrators. I must develop a form of measurement to determine if the implementation was successful and if the intended goals were achieved.

Figure 2 provides an illustration of LCM and the corresponding intersections within the LYNU community at each stage (intersection is displayed in boxes). Although the arrows in Figure 2 show a clockwise movement, it should be noted that LCM allows for fluid movement back and forth at any stage. A key benefit of LCM framework is its ability to be flexible, but I must continually communicate and reinforce the benefits of the change to the university community throughout the change transition to keep the momentum going. In the refreezing stage, all the newly introduced policies and procedures become the new current state, and I must prevent any type of regression to the former state.

Figure 2

Kurt Lewin's Change Management Model (The arrows show different stages of the model and not the relationship between variables)
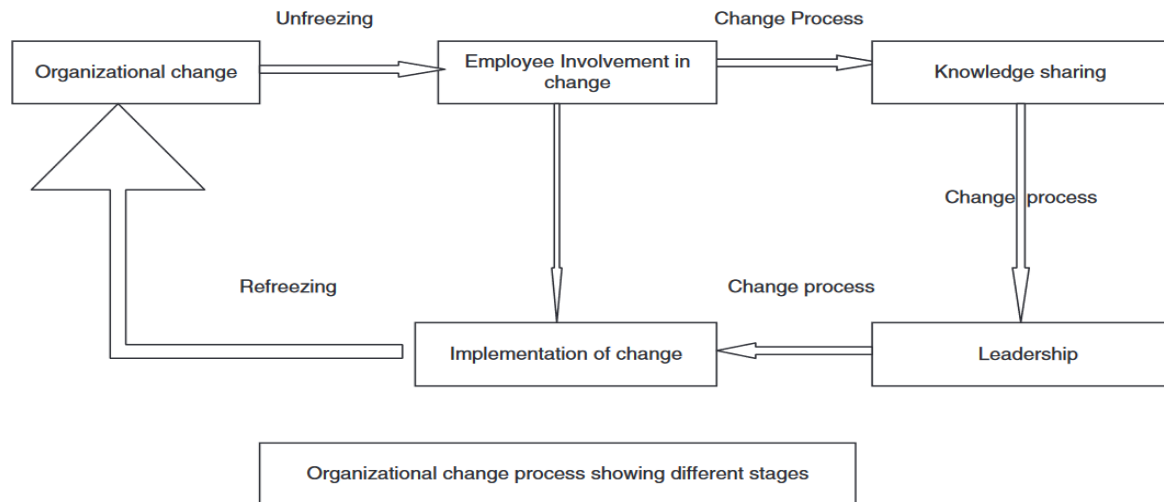
Note. From Kurt Lewin's Change Model: A Critical Review of the Role of Leadership and Employee Involvement in Organizational Change, by S. T. Hussain, et al., 2018, *Journal of Innovation & Knowledge*, 3(3), pp. 126.

Bridges' Transition Model

The Bridges' (2009) transition model (BTM) focuses on the emotional evolution people go through during the change process, where attention is placed on the psychological reorientation that people experience before accepting the change, and not the change itself (Bridges & Mitchell, 2000). BTM describes three stages that I must be aware of to help guide people through the change: (a) ending, losing, and letting go, (b) the neutral zone, and (c) the new beginning.

Ending, Losing, and Letting Go

Change is hard for most people and often the natural reaction is to resist change Kotter, 2006; McGrath et al., 2016). Most people feel uncomfortable learning something new as they are familiar in

their ways, and people can become fearful, often selfishly only concerned about how the change will impact them (Damawan & Azizah, 2020). At this stage, people must be convinced of the change and accept the need to move to the next step. I must support and guide people to reassure them that improvements will be made to award policies and that we will work through challenges together.

The Neutral Zone

Navigating emotions between the time when people start to relinquish the status quo and opening themselves to new possibilities can be difficult for people. This in-between time is referred to as the neutral zone and is uncomfortable for most people as they often either try to move forward quickly by embracing the change, or move backwards by resisting the change (Bridges, 2009; Bridges & Mitchell, 2000). This is a stage where I will need to work closely with community stakeholders and ask leaders from across both campuses for their help to support each other and be available to listen to concerns from people and guide them forward to accept the changes.

The New Beginning

When the changes are implemented, the goal is for people to embrace the new process and policies and become comfortable with the new way of doing things as soon as possible (Van Ryzin et al., 2011). If people feel well supported during the stages between when the changes are introduced and when the changes are applied, the move towards the final stage of acceptance should be smooth and the organization can move forward. At this stage people experience new energy, develop new identities, and discover a new sense of purpose (Miller, 2017). The goal at this stage is to keep people engaged and share the positive outcomes from the changes to award policies which can be used as a catalyst to spark future changes.

Blending Lewin's Change Management Model and Bridges' Transition Model

As an adaptive-authentic leader my focus is on people. Involvement from people is the key factor during the planning and implementation stage of change management which will help overcome

resistance during the transition (Hussain et al., 2018; Ramezan et al., 2013). When students, staff, and faculty feel supported and heard, they will be more open to accepting the proposed changes. Both LCM and BTM understand the importance of anticipating people's resistance to change, and as the change leader, I must anticipate opposition to changes and be prepared to deal with people feeling anxious. LCM stresses the importance of constant transparent communications from leaders (Huarng & Mas-Tur, 2016), and BTM reinforces the need for leaders to be aware of the emotional supports that people require to move through the stages of change (Van Ryzin et al., 2011). Figure 3 highlights key features of both change management models and how it leads to a blended approach.

Figure 3

Blended Change Management Model (the arrows show flow, but people can move back and forth)
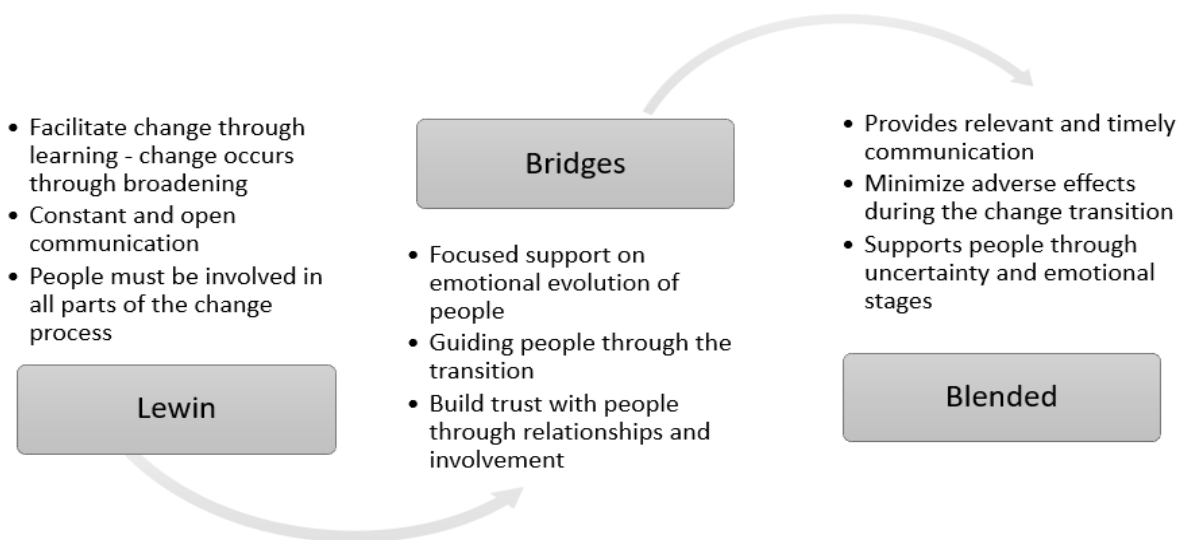
LCM and BTM offer complementary supports within each other. I would use the two models in a blended form and consistently focus my support on people and use communications as a key theme throughout each stage. The LYNU campuses have a large and diverse population that consists of students, staff, and faculty from all parts of the world which makes communication style, content, and

delivery critical and complicated (Barker & Gower, 2010). Communications must be well executed to ensure everyone receives and interprets the same intended message. Combining the LCM and BTM frameworks provides a real-world guide for change and emphasizes the common features of each model. I can use this as a roadmap to ensure transparency in communication, build relationships based on trust, and empower people through participation (Page & Schoder, 2019). The blended change model promotes working in partnership with people rather than directing how the change needs to take place.

I am confident that using a blended change management model will help this OIP achieve both first-order and second-order changes. "First-order changes are incremental modifications that make sense within an established framework or method of operating. Second-order changes are modifications in the frameworks themselves" (Bartunek & Moch, 1987, p. 484). First order-change serves a purpose and updates to the award policies meets first-order change by increasing award access to students and aligning award practices to university goals. Second-order change impacts policies that govern the institution, and this will be achieved when Senate award policies are updated and passed.

Third-order change involves the transformation of the identity of the organization and impacts changes on the broader post-secondary education environment (Tsoukas & Papoulias, 2005). LYNU can achieve third-order change through the implementation of this OIP. The concept of modernizing LYNU award policies by removing punitive practices tied to funding, increasing student access to money, and rewriting award policies with an EDI lens was meant to ensure award policies are equitable for students. There is an opportunity to share and implement new award policies to all students in Canada, but this would be a long-term goal that will take years to achieve.

Organizational Change Readiness

Organizational readiness for change is a multi-level and multi-faceted construct, which refers to people's commitment to change and effectiveness to implement the changes (Weiner, 2009). In exploring change readiness, I have opted to apply two approaches to evaluate the current state at LYNU

to measure people's willingness to accept changes to the awards policies. I wanted to use two approaches given that it has been three decades since any noticeable change has been made to award policies. The results of these assessments should inform me if the LYNU community is ready to update award policies and align policies to the commitments made in the strategic plan to improve student access to financial resources and applying EDI practices to the award processes (LYNU, 2018). People cannot be forced to change, and community participation is needed to diagnose what is going on to help figure out what to do during the actual change process (Schein, 1996). Lewin's force field analysis (1943) and the eight-point model by Judge and Douglas (2009) will be used to assess if the LYNU community is ready and willing to make changes to award policies.

Resistance to Change

Before any readiness assessment is applied, I must remind myself not to underestimate people's natural resistance to change (Bilichenko et al., 2022; Warrick, 2022). LYNU award policies and practices have remained unchanged for an exceedingly long time, and any attempt to disrupt the current state could evoke fears of job loss due to changes in processes, perceived lack of control, and experiences of personal uncertainty (Mosadeghrad & Ansarian, 2014). There are three general types of resistance as described by Yılmaz & Kılıçoğlu (2013): (a) blind resistance, (b) political resistance, and (c) ideological resistance.

Blind resistance refers to people who will automatically resist any change regardless of what it is (Cho et al., 2021; Furnham, 2012). I expect there will be a subset of people at LYNU that do not want to update any aspect of the award policies, want to maintain the status quo, and not make any changes to how students receive their funding. People with political resistance think they will lose something of value when the change is implemented (Yılmaz & Kılıçoğlu, 2013) and specific to LYNU awards, some people may perceive that the academic integrity of the award program will be diluted if changes were made to the current academic requirements and students are not held to a competitive academic

average. Finally, ideological resistance can be the most challenging to overcome when people genuinely believe the change is not needed or will not work (Damawan & Azizah, 2020). Unfortunately, there will be some people within the LYNU community who will not see the need for changes to the award policies and feel that awards are intended to reward students for their high academic achievements and are not concerned that awards do not address social issues or are misaligned to university strategic goals. At LYNU, all three types of resistance exist, and I must be prepared to manage several types of opposition.

Assessing Change Readiness

Kurt Lewin's force field analysis (1943) will be the first assessment to be applied during the facilitation of participatory discussions and planning (Kumar, 1999). Table 3 outlines the results of the force field analysis at LYNU. It displays helping and hindering forces which show me where there is support to the change initiative and what is obstructing the change initiative.

Table 3

Lewin's Force Field Analysis (1943): Changes to Monetary Award Policies at LYNU

Helping Forces (Drivers)	Hindering Forces (Restraining)
Alignment to LYNU strategic goals to increase student access to funding.	Academic criteria tied to awards is customary practice in Canadian post-secondary education, LYNU would be an outlier.
Historical award appeals data showing low number of students losing their funding.	Concerns of lowered/lack of academic rigor, no accountability.
Improves LYNU social justice and EDI practices.	Concern of perceived award prestige, lowered standards.
Reduced resources required to manage awards.	Historical long-standing award policies, people are resistant to change.
Supports strategic goals (improve access to equity-deserving students).	Possibly delaying time for students to graduate without minimum academic requirements.

Table 4 uses the eight-dimension analytical model by Judge and Douglas (2009) which includes a detailed review of: (a) trustworthy leadership, (b) trusting followers, (c) capable champions, (d) involved mid-management, (e) innovative culture, (f) accountable culture, (g) effective communication, and (h) systems thinking in the analysis. By conducting two change readiness assessments, I will ensure a thorough analysis is done to gain a comprehensive overview of the different forces which may impact changes to award policies, and it will help me proactively develop effective responses (Schwering, 2003), while demonstrating due diligence to the university community.

Table 4

Judge and Douglas Eight-Dimension Model (2009): Change Readiness at LYNU

Dimensions	Applied at LYNU
Trustworthy leadership	Leadership is respectful and passionate about changes to the award program. Good partnerships with faculties and students.
Trusting followers	Critical mass of students, staff, and faculty to support change.
Capable champions	Determined group of people who are goal oriented and persuasive. Helps to move award changes forward.
Involved mid-management	Middle managers passively or actively promote the benefits of change and help build excitement amongst colleagues.
Innovative culture	EDI, social justice, and providing access to education are core values, which need to align with awards policies and practices.
Accountable culture	Monitoring the outcomes of award changes and use of data and student testimonials to demonstrate that results are beneficial.
Effective communication	Leaders effectively use email, in-person meetings, phone/video calls, and announcements across both campuses to maintain transparency.
Systems thinking	Senate award policies are revised to ensure the new award infrastructure is built to support the change permanently.

At LYNU, trustworthy leadership and trusting followers are found throughout both campuses, and there is a history of transparency in communication between faculty and staff when deciding awards. There are capable champions who have been eagerly waiting for changes in award policies that I have selected from the faculties, stakeholder groups, and student associations to help me lead the change process (Judge & Douglas, 2009). The involvement of middle managers is critical in helping set up communication channels between senior executives and other members of the organization (Ramezan et al., 2013), and I must seek feedback from the middle managers throughout the process. Innovative and accountable culture is encouraged at all levels at LYNU, and leaders operate with a high degree of autonomy and utilize data to make informed decisions. I lead from within the Registrar's Office where communication channels are embedded into faculty and student services, which makes communicating and reaching large groups simple and effective. I also have access to people who recognize the interdependencies inside and outside the organizational boundaries and learning practices (Ramezan et al., 2013) to demonstrate systems thinking and create infrastructure.

After applying both the force field analysis and eight-dimension model to assess change readiness at LYNU, the information confirmed my existing assumptions that both LYNU campuses are ready for changes to be made to existing award policies. Performing both assessments highlighted issues that may be in my blind spots and helped me anticipate areas of resistance after reviewing the feedback from faculties, students, and staff (Yüksel & Yüksel, 2012). This feedback will assist me in my decision-making process before any changes are recommended, which aligns with my adaptive-authentic leadership style. This will demonstrate to the university community that people are ready for change and offers confidence in my decision to move forward with changes to LYNU award policies.

Internal Versus External Change Forces

Even with confirmations from two readiness assessments indicating that the LYNU community is ready for changes to happen within the award policies, a further look must be done through a macro,

meso, and micro lens to examine the internal and external change forces to help identify further

blockers. The macro level will include reviewing and conversing with Canadian post-secondary

institutions and external award providers since they follow an award governance model (Heller, 2001;

Rouf, 2019) similar to current LYNU award policies. I already anticipate the national community

members will have reservations to changing award funding policies, but I have strong relationships

within Canadian award programs and can start discussions about why award practices need updating

since most do not reflect any EDI, social justice, or decolonization practices. These discussions could lead

to a nationwide philosophical shift and help change traditional mindsets as to how awards are managed

which can benefit students and improve access to award funding.

The meso level will include consultations with LYNU faculty and staff, and I can use my influence

within the awards program to initiate multilevel stakeholder consultations. Stakeholder consultations

will help address operational and student concerns, and if done well, can lead to a sustainable

competitive advantage and foster good workplace relations (Dundon et al., 2003). My experience and

position within LYNU will allow me to address both strategic and functional concerns people may have

and can help build confidence with key internal stakeholders who administer awards. Hearing the

concerns from this group will be critical to move this OIP forward since faculty and staff can offer insight

specific to LYNU students and explain what is currently working and not working within the awards

process.

At the micro level there are student award recipients, and my role at LYNU provides me with

direct access to various student groups. I would first speak with Indigenous student award recipients

and ensure their voices are heard by our university leaders, and then gradually increase my consultation

with other award recipients. Interacting with a cross section of award recipients and listening to their

suggestions, concerns, and stories will be critical in preserving what is working and can also influence

the behavior of other groups to help accept novel changes (Elandary & Phillips, 2013). Gathering an

inventory of impactful student stories will personalize student challenges and humanize policy decisions. "Stories typically recount a sequence of events in which one or more protagonists interact with their world, often confronting and attempting to resolve problems along the way" (Landrum et al., 2019, p. 2). Being able to connect directly with award recipients and listening to how award policies impact their lives would provide excellent testimonials on how monetary awards help students, and where current policies are creating barriers for the recipients. Individual student feedback can pinpoint areas where access was blocked, and EDI efforts can be improved.

Solutions to Address the Problem of Practice

Three decades have passed since any significant updates were made to the LYNU monetary award policies. The current policies tie academic performance to award money which often causes students to lose their funding. These policies do not align to university strategic plans to improve access to financial resources for equity-deserving student groups, EDI practices, or supports to Indigenous students (LYNU, 2018), and changes need to be made to remove these barriers. Strong policy design requires continuous collaboration with stakeholders at multiple political, policymaking, managerial, and administrative levels as well as engagement from students and award managers (Hudson et al., 2019). There are three solutions LYNU senior leaders can consider when addressing this PoP and help students gain access to their award funding more equitably (maintaining the status quo will not be one of the recommendations since it would contradict the purpose of the PoP and this OIP).

Solution 1: Minor Updates to the Academic Requirements within Monetary Award Policies

The existing award policies require most undergraduate student award recipients to meet both a GPA and credit load minimum. The recommendation would be to lower the existing academic requirements. This would keep LYNU award policies aligned with the standard post-secondary industry practice of binding academic requirements to award eligibilities (Heller, 2001), but also reducing pressure to students by lowering the academic thresholds. Currently the academic requirement is to

hold students to achieve a minimum GPA of 75% in each course and take at least 24 percentage-graded credits in the current session (approximately eight courses between September to April). Under this proposal, LYNU would lower the GPA to 65% and reduce percentage-graded credit requirements to 18 credits which would allow students to take approximately two less courses each session. I would lead this proposed solution at both campuses, and it would take 12-15 months to implement which includes stakeholder consultation and approval through both Senates.

Solution 2: Engage in External Stakeholder Consultation

This solution recommends that LYNU leaders do not implement any immediate changes at this time to award policies, but instead begin an external consultation process which could lead to the formulation of a national community of practice. The LYNU awards program has an abundance of institutional data provided by students and award managers, but has limited information from external award programs, and no information from comparable universities within Canada. External reviews can generate new perspectives and supply useful information, but LYNU leadership must be careful not to use only information conducted through one external review since it will be inadequate to promote a successful change strategy (Alagoz et al., 2018), and additional committees would need to form for further discussion to determine how to operationalize the recommendations. I would lead this process at both campuses and the consultation and review process would take approximately 24 months before a formal written proposal could be brought forward for further discussion and action.

Solution 3: Elimination of the Academic Requirements within Monetary Award Policies

This solution recommends the complete removal of the existing academic requirements within LYNU award policies requiring students to maintain a minimum GPA of 75% in each course and taking at least 24 percentage-graded credits in each session (September to April). More simply explained, academic conditions would be removed from student awards, and award recipients would receive the entire amount of the award funding they were originally offered, paid in equal installments over four

years. Access to finances continue to be a major impediment for students to gain entry to post-secondary education and a major barrier to graduation (Long & Riley, 2007), and by removing the possibility of losing funding, students can focus on their studies and have a gainful university experience. This solution further recommends that Indigenous student awards are prioritized to be the first group to have academic requirements eliminated to bring LYNU strategic initiatives into greater alignment and to demonstrate a commitment to decolonization practices. I would lead this proposed solution and would require 12 months to implement which would include consultations with the Indigenous community and Senate approval on both campuses. I would need an additional 6 months to implement changes to the remaining non-Indigenous awards to include additional stakeholder consultations.

Analysis of Possible Solutions

All solutions proposed are intended to improve access to LYNU monetary awards for equity-deserving students and to ensure award policies are aligned to university goals. Examining each solution from various views and comparing their advantages and disadvantages will help me recommend the best solution to address the problem. A major theme for this OIP is ensuring that people are supported, and reviewing each potential solution will help ensure the outcome leads to the best result for students, faculties, and staff. This process is also in alignment with my adaptive-authentic leadership style, as ensuring people feel well supported and projects are implemented in a timely and sustainable manner are key characteristics of my leadership style.

Table 5 displays the three suggested solutions and highlights the impacts to stakeholders, demonstrates alignment to LYNU strategic goals, and confirms if the solution supports the PoP. The table offers a comparison of each suggested solution, and highlights the key benefits within each solution.

Table 5

Factors for Consideration: Proposed Solutions (bold font indicates benefit/positive factors)

Factors for Consideration	Solution 1: Minor Change to Academic Requirement	Solution 2: External Stakeholder Review	Solution 3: Remove Academic Requirement
Aligned to EDI Initiatives and LYNU Strategic Goals?	Low impact, lowering academic requirements would only partially support EDI.	Low impact, thoughtful discussions, but no action to make immediate changes.	**High impact**, removing academic conditions would remove barriers and support EDI goals.
Aligned to PoP?	Partially	Partially	**Yes**
Approximate Timeline?	Implementation within **12-15 months**	Implementation after 24 months	Implementation within **12 months**
Impact on LYNU Stakeholders?	**Medium impact**, to adjust GPA/credit limits with no change to work process.	Low impact, stakeholder discussion only.	**High impact**, major reduction of award processing.
Impact on Students?	**Medium impact**, some increased access to funding.	Low impact, stakeholder discussion only.	**High impact**, students have full access to funding.
Supportive of Social Justice?	Low impact, no changes to improve policies.	Low to no impact, discussion only.	**High impact**, elimination of barriers to access.

Ethical Decision Making

As an adaptive-authentic leader, I must do what is best for students, faculty, staff, and the university community, which requires the use of ethical decision-making (Canady, 2019). Applying multiple ethical lenses to each of the three proposed solutions will highlight areas of ethical concerns and reveal the best solution to implement that will align award policies to university goals. Using Wood and Hilton's (2012) five ethical paradigms: (a) care, (b) critique, (c) justice, (d) local community, and (e) profession will supply additional perspectives for contemplation in the selection of a final recommendation. This will continue to improve confidence when making the final decision.

Ethic of Care

This framework focuses on compassion, understanding, and trust with emphasis on placing people first and being empathetic (Botes, 2000; Nicholson & Kurucz, 2019). By applying an ethic of care paradigm to all three recommended solutions it confirms that each solution intends to help students, but Solution 1 and Solution 3 will provide quicker improvements for student award recipients. Solution 1 and Solution 3 will also require that I be empathetic to faculty concerns since faculty members may be apprehensive with the recommendation to reduce or eliminate academic criteria as a requirement to receive award funding. The ethic of care framework highlights Solution 3 as the most supportive to EDI and social justice issues and should encourage people to be open and more compassionate towards student circumstances (Zoghbi-Manrique-de-Lara & Viera-Armas, 2019). Solution 2 attempts to help students, but it is through discussions and any tangible actions will take years to implement.

Ethic of Critique

The ethic of critique focuses on the moral responsibility that rules, codes, and procedures do not advantage one group over another (Shapiro & Stefkovich, 2016), which is a crucial factor when incorporating EDI practices into LYNU award policies. Each student is different and brings diverse experiences to the university. Applying an ethic of critique framework guides decisions to ensure award recipients can access their money and are evaluated in a manner that takes their personal circumstances into consideration.

Solution 1 does not recommend changes substantial enough to fully address inequity within the current award policies. Solution 2 would allow for a deeper exploration of barriers faced by various student award recipients and their information could help develop equitable policies for future students. Solution 3 is the only recommendation that would immediately level the playing field, starting with Indigenous student award recipients and the removal of all academic requirements from award policies.

Ethic of Justice

This framework focuses on rules, codes, and procedures that should be followed when making decisions (Enomoto, 1997). The existing LYNU award policies are currently heavily governed by the ethic of justice framework which holds all student award recipients to identical rules no matter the circumstances. This practice can lead to students losing their award, and then submitting an appeal to keep their award funding due to exceptional circumstances. All three proposed solutions challenge the one size fits all model currently governing award policies and prioritizes treating every student with dignity (Toldson & Lewis, 2012), but Solution 3 proposes the most radical solution which could quickly remove barriers for students and support EDI, decolonization, and social justice efforts.

Ethic of Local Community

The ethic of local community centers on the notion that LYNU must serve the needs, interests, and public good of local communities, and make ethical decisions which will benefit the community while respecting the local culture (Wood & Hilton, 2012). Each of the two LYNU campuses consists of a diverse student, faculty, and staff population from all over the world and is situated on ancestral unceded territory of local Indigenous people. Solution 3 recommends the prioritization of changes to Indigenous student awards to accelerate the removal of barriers to award policies to improve access to financial resources and support academic completion for Indigenous students (Oloo, 2007). Reconciliation with Indigenous communities is a key priority for LYNU (LYNU, 2020), and all three proposed solutions will bring benefits to Indigenous student award recipients, but Solution 3 offers a solution that is both immediate and free of barriers.

Ethic of Profession

The ethic of profession acknowledges that there are guiding values (e.g., principles, codes, assumptions, and expected behaviors) within each profession, and adhering to these values is an obligatory duty for leadership (Smith & Fox, 2019; Wood & Hilton, 2012). Applying this decision-making

framework reinforces that each of the three proposed solutions are guided by the common goal to help students access their award funding and to prioritize the best interest of the students. Solution 1 and Solution 3 will provide quicker action that will generate tangible benefits to student award recipients, while Solution 2 will take two years for discussions to take place.

Reviewing the three proposed solutions within the five ethical decision-making frameworks helps to highlight the areas where equity and social justice practices could be most improved upon, and which solution would be the most viable for implementation at LYNU. The next section will identify the recommended solution and further discuss the feasibility of making changes to existing award policies.

Recommended Solution

Upon careful consideration, Solution 3 presented the highest level of positive impact to students, displayed the most reasonable implementation timeline, aligned directly to LYNU strategic commitments, and fell within my scope of authority to lead the change process. Solution 3 is the best fit for LYNU students as reforming award policies by removing academic requirements will ensure that students will receive the entire funding they were promised when they were first admitted. Although efforts to help students succeed can take many forms, one key approach to help students would be for LYNU to provide unrestricted funding to bridge the gap between estimated financial need and actual costs to make sure students feel more financially secure (Jack, 2020). Providing access to award funding for students will help close the financial gap, and by eliminating GPA and credit load minimums will support practices of equity by providing a level playing field for all students and avoid placing students in unexpected financial shortfalls. Student award recipients will know exactly how much award funding they will receive each year which will allow them to plan more effectively. There are also administrative benefits for staff and faculty since they will no longer need to process award appeals or provide academic evaluations at the end of each session.

The elimination of academic requirements from awards would allow students to occasionally fail a course or take a lighter course load. The recommended updates to award policies would be first applied to Indigenous student awards to prioritize access to education for Indigenous students. This would align to commitments made to better support Indigenous students (LYNU, 2021) and help students who face financial instability and avoid lower overall feelings of well-being (Hassan et al., 2001). Applying Solution 3 would guarantee students their award funding, paid in equal installments over four years, and they would not lose their funding unless they stop studying at LYNU.

Implementing Solution 3 will not impact LYNU award budgets. All existing award contracts stipulate the maximum dollar amount of the award, and award values are not tied to the number of courses taken each session. Students will not receive more money than originally offered, no matter how long they take to complete their program. This will help maintain control over annual budgets and donor contributions that fund the LYNU awards. Although most award recipients graduate within four years from their program, those who require more time will be expected to seek other sources of funding such as accessing government student loans, applying to other awards programs, or asking family for support.

Solution 3 directly addresses the PoP by offering a viable solution to be applied to LYNU award policies to align to the strategic goals of the university related to accessibility and affordability. Solution 3 recommends the full elimination of the academic requirements which are currently embedded into award policies, starting gradually with Indigenous student awards, and subsequently introducing the new policies to other awards with the goal to detach academic criteria entirely from award funding. This strategy will align award policies with LYNU strategic goals to increase access to equity-deserving student populations. Obtaining a post-secondary degree is often viewed as a critical component of social mobility, and students with limited financial resources are less likely to graduate regardless of their academic ability than their peers from higher income families (Soria et al., 2014). Solution 3 will provide

the most impactful and positive change to equity-deserving student award recipients and align award policies to the LYNU strategic plan.

Chapter 2 Summary

This chapter highlighted the benefits of combining frameworks to provide holistic support to LYNU processes and people during times of change. An analysis of my adaptive-authentic leadership style showed how it would support people and processes under a blended Lewin (1951) and Bridges' (2009) change model. Supporting the emotional needs of people during the change transition is the cornerstone of my leadership style and the two change models and will be helpful to move any change transition through both campuses. Applying two organizational change readiness assessments using Lewin's force field analysis (1943) and Judge and Douglas' eight-point model (2009) confirmed that the LYNU community is ready for change to award policies, which led to the recommendation of three practical solutions to address the PoP. Applying an ethical decision-making framework to the proposed solutions helped to identify a final recommendation for implementation at LYNU. In Chapter 3, I will outline the change implementation and communication plan, while determining a sustainable evaluation process to monitor the suitability of the change.

Chapter 3: Implementation, Communication, and Evaluation

Chapter 3 will focus on the communication, execution, and evaluation of the change implementation plan. LYNU leaders will continue to use the blended people-centric change models by Lewin (1951) and Bridges' (2009) as a foundation to promote ethical behaviors and encourage people to change of their own free will while avoiding change due to imposition and coercion (Burnes, 2009). The chosen evaluation model and communication strategy will be described, and the OIP will conclude with a brief discussion to explore future opportunities and third-order change possibilities.

Change Implementation Plan

After 30 years without significant changes to LYNU award policies, the introduction of a major shift in policies will require a coordinated strategic approach. A change implementation plan (CIP) will help guide both campuses through the transforming landscape of the award programs.

Context for Change and Goals

The critical theory paradigm encourages people to challenge the status quo (Burrell & Morgan, 2011; Callaghan, 2017), and the LYNU award policies will be moving forward with the recommendation to remove academic requirements as a condition for students to receive their award funding. This decision is both radical and long overdue. LYNU awards have historically been provided only to top academic students, but with increased accountability to improve EDI and social justice practices, awards are more frequently being offered to academically qualified equity-deserving students to provide greater access to post-secondary education (Conner & Rabovsky, 2011; Heller, 2001). It is important that LYNU award policies are updated to be reflective of the changes to how awards are being used and create equitable policies for students in alignment with university goals.

Successful donor fundraising campaigns and strong fiscal management of award budgets at LYNU have sustained many student awards each year, and new sources of funding are being used to establish awards prioritized to improve access to post-secondary education for equity-deserving

students to align to strategic goals (LYNU, 2021). The PESTE analysis from Chapter 1 provided an

environmental scan which identified areas which could act as barriers to this OIP, and the readiness

assessments from Chapter 2 confirmed that the LYNU community is ready to implement the changes

required to address the PoP. My goals are to successfully implement the recommended solution at LYNU

and ignite third-order change to Canadian post-secondary award programs in the future. I want to

encourage other institutions to challenge the status quo of their internal award policies (Bartunek &

Moch, 1994), and inspire them to provide unobstructed access for their student award recipients to

award funding.

　　　To make changes to award policies, unified support from LYNU faculties, students, and staff is

required, and my adaptive-authentic leadership approach will help people thrive in the face of

challenges, prepare them for the change process, and support them through the transition. Authenticity

plays a significant role when developing relationships and there must be transparency, trustfulness, and

consistency in my leadership approach (Iqbal et al., 2019; Waite et al., 2014). I must actively engage

stakeholders and encourage two-way communications during the change process to ensure the

recommendation is being implemented in a collaborative manner on both campuses, and people do not

feel they are being forced into change.

Change Implementation

　　　The recommended solution from Chapter 2 describes a radical change to LYNU award policies

where GPA and credit load minimums will no longer be a condition for students to receive their award

funding. A transformation of this magnitude requires a CIP that will support people through the

adjustments in processes, and more importantly, educate them as to why award policies need to be

updated. Caring and effective leadership is the critical factor in this CIP, and it requires courageous

people to disrupt time-honoured patterns of behavior, challenge opinions, and upset the status quo

(Fernandez & Shaw, 2020). Introducing changes to award policies that are contrasting to most other

post-secondary institutions in Canada may be unsettling to those who support award processes and can

potentially disrupt nationwide norms that follow conventional award policies and practices.

The LYNU community is ready for a cultural shift in their award programs and must start aligning

award policies and practices to university strategic goals. Strategies must be expertly coordinated, and it

is critical to integrate functional designs into the overall university plan (Leskiw & Singh, 2007). Ensuring

award budget management is congruent with LYNU strategies will seamlessly support award goals. The

CIP will use a blended LCM and BTM framework to move the changes forward while ensuring the

emotional needs of people are kept prioritized during the change. The blended change model will help

leaders find opportunities at every stage of the transition to keep community engagement high.

Leadership Approach to Change Implementation: Adaptive-Authentic Leadership

The goal of this OIP is to improve students' access to the awards they were promised when they

accepted their offer to study at LYNU to reduce financial uncertainty and help with student affordability.

My adaptive-authentic leadership style will be an effective approach to lead this level of change and

ensure that both the operational and emotional needs of all those impacted will be met. As the change

leader, I must remember that progress will not be linear (Hayes et al., 2007) and people will adapt at

various stages while new processes and behaviors begin to normalize. People will begin to see gradual

shifts in the organizational culture when former practices are abandoned and the number of people

accepting the changes increases.

Adaptive-authentic leadership is complicated since it requires me to display genuineness and

vulnerability (Crawford et al., 2020; Zheng et al., 2022), but in doing so, it could make me appear

stressed or upset at times during the change transition. People only trust an authentic leader when the

leader is genuine and not an imitation (George & Sims, 2007), and I need to be aware that exhibiting my

true emotions might be looked upon unfavorably by the LYNU community. To change the monetary

award beliefs at LYNU, I must avoid associating adaptive challenges only as technical problems which are

easily identified and resolvable, and instead acknowledge that adaptive challenges require changes in

values, beliefs, relationships, and approaches (Muluneh & Gedifew, 2018). Changing award policies will

be less about a technical change, but leading the university into accepting a new idea of how awards are

utilized and shifting the overall university culture.

Change Planning and Identifying Priorities

People must feel appropriately supported during the change process, and I must gain backing

from key stakeholder groups from both campuses if I want to successfully implement transformations to

award policies. Applying a blended LCM and BTM change framework will provide the scaffolding I need

to effectively implement the changes and keep people engaged throughout the transition. Figure 4

shows the CIP timeline within the blended change framework model.

Figure 4

CIP Timeline and Change Frameworks from Lewin (1951) and Bridges' (2009)

STAGE 1: September - January
LCM unfreezing / BTM
ending, losing, and letting go

STAGE 2: February - April
LCM change / BTM the
neutral zone

STAGE 3: ongoing after May
LCM refreezing / BTM the
new beginning
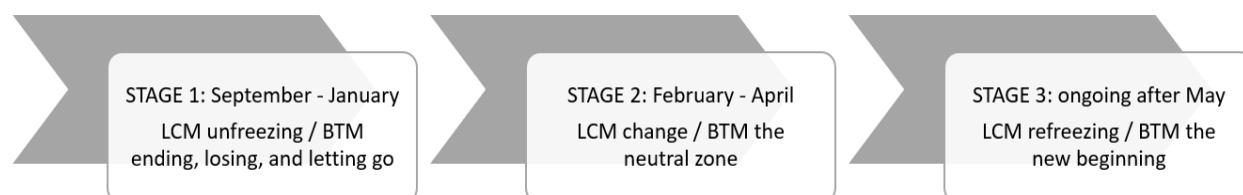
Stage 1: Unfreeze / Ending, Losing, Letting Go

The first stage of the LCM is called unfreezing, which introduces the proposed changes to the

LYNU award policies to key stakeholders on both campuses. This first stage will occur between

September and January, and I will lead the conversations with critical stakeholders by going on a

roadshow to consult executives and community leaders. I must be prepared to present data showing the

barriers students face when trying to access their award funding, and why it is necessary to make

changes to award policies. During my discussions, I need to present passionately but also be equipped

with academic literature, statistics, student anecdotes, and reasons why award funding is critical to student success. Effective change requires everyone to feel a need to change, and only by gaining the active commitments and involvements of people will the change be a success (Buller, 1988; Burnes, 2004a). Stakeholders will have multiple opportunities to converse with me via video chat, in-person, through emails, or by phone. A considerable amount of time will be invested in the discussion process, and I am committed to speaking with people from both campuses and meeting with individuals, small groups, or in larger community sessions.

I must prioritize concerns related to Indigenous student award policies and approach the Indigenous community with respect. As a non-Indigenous person in a leadership position, I want to ensure that cross-cultural and cross-epistemological dialogue takes place with Indigenous stakeholders, and assumptions are avoided (Coleman et al., 2012). It will also be crucial that I am ready to address concerns from award managers who may have apprehensions about the unknown aspects of their job when award policies change (Chou, 2014), and I will need to provide quantitative and qualitative data to build confidence in the change and ease people's concerns.

Ending, losing, and letting go, is the name of the first stage of BTM which will dovetail with the LCM unfreezing stage to provide additional support to the emotional needs of the LYNU community. People may be disbelieving, angry, or fearful when they first hear about the changes to monetary award policies (Blom & Viljoen, 2016), and any change makes people uneasy when they must let go of their sense of identity and give up what they have been good at in the past (Bridges & Mitchell, 2000). People must be informed of the positive changes that will benefit students and award managers, leaders must be transparent of the pain points of the transition, and explanations must be provided as to why a change is needed to award policies. Key stakeholders must be given time to review the changes, ask questions, and voice their opinions. My adaptive-authentic leadership style will be useful during the collaborative sessions, and I will come prepared to listen wholeheartedly. Each engagement session will

allow for questions, build a level of comfortability, and establish the open communications needed throughout the change process.

Stage 2: Change / The Neutral Zone

I anticipate that there will be some early adapters who will embrace the award policy changes and move the community into the second stage where detailed operational conversations with award managers will take place. During stage two of LCM: change, the Senate committee will have passed the new award policies and implementation has begun. The timing of the change stage will run from February to April, and I will lead small working groups, starting with award managers from the Indigenous community, to meticulously work out the finer details of operational level changes. I will make considerable efforts to speak to any remaining opponents of the change and demonstrate my confidence and leadership on this matter while providing answers to address their questions. At this stage, I will begin to develop a communications plan to coordinate across both campuses.

The BTM second stage: neutral zone, will run in parallel with the LCM change stage. During this second phase, I will actively reassure people who may be confused, frustrated, and are still skeptical of the benefits of removing academic conditions from student awards. The neutral zone is an intermediate time when past practices are being eliminated, but the new process is not yet fully operational (Bridges, 2009; Miller, 2017), and people will require additional emotional support. I must be prepared to address individual concerns, seek out root causes of problems, and be empathetic to personal reactions. Some people will be apprehensive about what their job duties will look like once the award policy changes are implemented, and I must convey how new tasks will replace existing tasks and help people visualize their new world.

Stage 3: Refreeze / The New Beginning

The final stage in both LCM and BTM is the last step of the CIP where the new procedures have been implemented. This last stage can feel choppy as acceptance of the change will be asynchronous

(Hayes et al., 2007) and requires people to develop a new identity in their work while discovering a new sense of purpose (Bridges & Mitchell, 2000). This third stage would begin in the month of May and continue until a new culture is formed. Successful change processes is a group activity and group norms and routines must be transformed, otherwise changes to individual behavior will not be sustained (Burnes, 2004b). The award policy changes required approval through Senate, which now makes them the official award policies at LYNU (for all domestic undergraduate awards) and reverting to the former way of doing things would be extremely difficult since the past policies no longer exist.

During the LCM refreezing and BTM new beginning stage, I will provide both campuses with regular updates on shared concerns and successes. As an adaptive-authentic leader, I will acknowledge the hard work and challenges experienced during the change implementation process and display the alignment of the new policies to LYNU strategic goals and EDI commitments. My messaging to the LYNU community will be transparent and timely, and even in this final phase, it is critical to keep people energized and committed to the changes implemented. Appendix C summarizes the new combined change frameworks applied to people and processes at each stage.

Stakeholder Impacts and Reactions to Change

GPA has long been the most consistent benchmark to measure academic performance, but it is unrelated to financial awards and is often a barrier keeping students from accessing financial resources (Poropat, 2009; Scott-Clayton, 2015). Changing the award policies will offer immediate benefits to students by untethering their award funding from academic requirements, and students will have the opportunity to experience more freedom in their overall university experience without pressure to maintain GPA or credit loads. Student award appeal processes will be eliminated once changes to award policies are implemented, which will reduce the administrative work for award managers and faculty advisors, since students are guaranteed their award funding.

Students can have better control of their financial situation if they know how much money they will receive from awards. By removing the uncertainties if students will receive their award funding, students can consider volunteer opportunities, participate in co-op experiences, and avoid taking on part-time employment purely to supplement their income (Britt et al., 2017). Faculties can also benefit from the decoupling of academics from award policies, as the separation provides an additional degree of autonomy and innovation in course design (Cuban, 1990). By removing academic requirements from student award funding, faculties can freely design courses and curriculums without inadvertently impacting student credit loads or grading criteria for the sole purpose of award eligibilities.

Although most people will appreciate the removal of academic conditions within the new award policies, there will be a subset of people who may feel differently. It is commonly assumed that there is always a trade off when trying to introduce EDI into policies, and implementing change designed to increase access in one area, may result in the decrease of another (Le Grand, 1990). Some people may feel that increasing access to awards by removing rigid academic requirements could decrease the prestige of the award. People must consider changing their mindset and view awards as a way of improving student access to post-secondary education, especially equity-deserving students from less affluent backgrounds who lack family capital (Marginson, 2016). I must be prepared to address questions from those who are concerned about academic rigor, and share data that shows the competitive academic results from externally funded student award recipients who are not bound to academic requirements to help alleviate concerns from the community.

Required Resources and Additional Supports

There will be no request for additional financial resources nor requirements to purchase technology or equipment for this CIP. Changing the current award policies and organizational culture relies on the support of leaders from the faculties, administrative units, Indigenous communities, and student groups. Even if one or two key people from the community hesitate to support the change, it

can potentially derail conversations and result in rumors and resistance to change, while exaggerating the negative aspects of the change (Wiatr, 2022). I must be able to effectively articulate why change is needed to monetary award policies to avoid people being confused and losing sight of the purpose of the change (Brown et al., 2013). Lack of stakeholder confidence can be disastrous to the CIP and if I can proactively identify and address the potential impediments brought forth by the community, there should be less resistance to the change. Appendix D identifies questions which will be asked by stakeholders that I must be prepared to answer.

As the primary change leader, I must rally a trusted group of like-minded people who will help me deliver consistent messaging, demonstrate unwavering support for the change, and are willing to dedicate time to answer questions people may have. LYNU campuses are situated on the unceded lands of multiple Indigenous communities, and I must acknowledge the diverse workforce and differences between individualistic and collective cultures (Barker & Gower, 2010). I will respectfully ask for help from Indigenous leaders in the community and speak to leaders directly to avoid any dilution in the message through a third-party. I will seek feedback early from Indigenous community members on both campuses and ask for their support in promoting the advancement of the change.

Inquiry cycles will act as an ongoing reflective process to assess impacts of the change (Bruce, 2008; Short, 2010). Support from award managers is needed to coordinate semi-annual surveys to award recipients, collect data on student progression, and report on student graduation rates. Qualitative and quantitative data will be used to deliver comprehensive reports to reflect the experiences and attitudes of people and the community and provide quality raw data for further analysis (McCusker & Gunaydin, 2015). The information gathered through the inquiry cycles will provide award managers with details to help explore additional areas for improvement and to engage the community in further discussions to ensure things are working well.

Potential Implementation Issues and Limitations

Admission offers and award offers are intentionally coordinated to provide students with comprehensive information to help them decide if they want to enroll at LYNU. The typical admissions cycle runs over two calendar years, with the admissions and award applications opening in August, and closing the following January. Most admission and award decisions will be communicated to students during the months of March and April, and students that accept their offer to study at LYNU will begin their academic program in September which is also when they will receive their first award installment.

Introducing changes to award policies will add a one-time complication to the standard admissions timeline. The award policy changes require approval through the Senate on both campuses by May. There are no Senate meetings in June, July, or August. If the new award policies are not passed at the Senate meetings by the month of May, this could lead to a major loss of momentum for the project and the CIP would have to restart the following year, and efforts would need to be made to ensure that all stakeholder support is still in place. Figure 5 shows the standard admissions and awards timeline, with the additional approval of changes to award policies.

Figure 5

Admission and Award Policies Approval and Offering Timeline (over two calendar years)
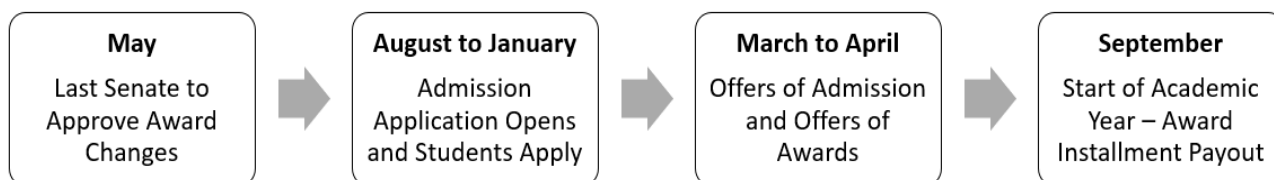
There has also been recent instability within executive leadership at LYNU, and if the new leadership does not support the changes to award policies, it could disrupt the entire OIP. Despite these potential implementation issues, there is also an unexpected benefit if award policy changes are

accepted. If GPA and course load calculations are no longer needed for award funding purposes, then the new LYNU student system currently being built will not need to create a specialized reporting tool specifically to calculate information for award purposes, which can save hours of development time. Throughout the change process, I must remain transparent with the LYNU community and acknowledge the challenges associated with the change. This aligns with my adaptive-authentic leadership style and will help me navigate potential pitfalls and increase the chances of success for the CIP.

Plan to Communicate the Need for Change and the Change Process

The recommended changes to LYNU monetary award policies will be embraced by some and rejected by others. I must be aware that I could be pushing the LYNU community into a state of flux which could border on chaos (Schatz, 2019). A communication plan is critical to an organizational change of this size, and I must gather support from the community, educate the necessity of the change to the stakeholders, and provide transparency during the evolution of the change (Cawsey et al., 2016). The communication plan must also integrate seamlessly into the blended LCM and BTM change framework which will act as the foundation to support people throughout the transition.

During the CIP, I will lead the communication process to avoid misinformation which can derail the change process. Change needs to be actively managed, and communication is the critical element that must be carefully sustained throughout the process (Angela-Eliza & Valentina, 2018; Heide et al., 2018). People must understand the motivation behind the change and how the impacts of the change will affect their work. Communication must address any uncertainties people may have and explain how the change will lead to improvements for people and processes. The key goal of the CIP is to convince LYNU students, faculties, and staff to accept the recommended changes to the monetary awards program, and an effective communication strategy will minimize rumors, persuade people to move in a common direction, and bring about enthusiasm for the change (Cawsey et al., 2016; Klein, 1996). During

all stages of the communication plan, I will reiterate the importance of updating award policies to align to EDI and social justice commitments outlined in the LYNU strategic plan.

Knowledge Mobilization Plan

Knowledge mobilization describes the range of strategies and relationships that link research with policies and practice, and it expands the impact of academic research for the benefit of policy change (Sá et al., 2011). This OIP makes a concerted effort to incorporate knowledge mobilization to apply academic research to address the issues associated with monetary awards and student access to funding to instigate changes to award policies. A knowledge mobilization strategy shows the links between academic research and how it can be applied to real world issues. Making academic resources accessible to award managers can help expand their knowledge, which can then be applied to improve existing policies and practices to benefit the campus community (Phipps et al., 2016). By incorporating academic research into both the CIP and communicating strategy, it will help bring credibility to the changes to award policies, and assist people to visualize future possibilities.

Briggs et al. (2015) recommends incorporating knowledge mobilization at the outset of a community-led process and to consider: (a) reach, (b) relevance, (c) relationship, and (d) results. Reach asks what the extent of my connection is to my target audience, relevance asks how applicable the academic research is to my audience, relationship includes connections that I need to build and maintain, and results are the actual outcomes based on the research (Briggs et al., 2015). As people grow more interested in how research and evidence connect with policy and practice, the importance of having a knowledge mobilization strategy in place becomes a critical tactic for future change implementation designs (Levin, 2008). There is much to be gained from academic research and transforming that knowledge into critical policy changes can provide LYNU leadership with a strategic advantage and help with the speed to implementation.

Lavis et al. (2003) describes a five-element knowledge transfer strategy which can be applied at LYNU that asks: (a) what should be transferred to decision makers, (b) to whom should research knowledge be transferred (c) by whom (d) how, and (e) with what effect? The knowledge mobilization strategy must seamlessly integrate into the change and communication framework, and the Lavis et al. (2003) questioning strategy works well with my adaptive-authentic leadership style which supports me to lead these discussions. Appendix E outlines the five questions that guide knowledge mobilization applied to the changes to LYNU award policies and explains the actions to be taken.

Communication Strategy

A successful communication program will mobilize support for the change (Cawsey et al., 2016; Heide et al., 2018). According to Klein (1996), communication strategies applied to the CIP should have three objectives: (a) provide detailed information to those who were not directly involved at the start of the change, (b) inform people that their roles will change and what their new responsibilities will be in the future, and (c) to clarify any misinformation about the change. The communications objectives outlined by Klein (1996) correspond nicely with my selected change framework and can be adjusted to ensure focused communications are provided to relevant groups in a timely manner. Post-secondary education is a very complex and interconnected organization requiring a clear common goal and coordinated effort from everyone to move forward and make effective change (Jimenez, 2020). My communication strategy will release information like a funnel starting with a wide communication base to all audiences, and then filtering to individual audiences to provide detailed information to the experts.

Provide Information to All

The first step in any change process is to build awareness for change and communicate why we need to change to achieve critical social goals (Ramezan et al., 2013; Dörnyei & Scott, 1997). By now, the key stakeholders at LYNU are aware of the plan, and I will start introducing and convincing the rest of

the university community about the changes to monetary awards and why this is beneficial. My plan

consists of leading a series of road shows to meet with students and explain the changes that will

directly impact award recipients, provide timely communications with community stakeholders, and

strengthen partnerships with Indigenous leadership to begin discussions with Indigenous communities.

I would take steps to work with communication experts from both campuses and ask for access

to email groups to ensure that all students, faculties, and staff are notified of the upcoming changes. It

would be useful to leverage official institutional wide communication channels to ensure that I do not

unintentionally overlook anybody. At this stage, I would encourage people to reach out to me directly

with any questions. It is critical to invite people to participate and to ask questions, and this will help me

craft messaging to ensure that communications will address individual concerns, operational questions,

and long-term benefits (Heide et al., 2018; Mohr & Nevin, 1990). Transmitting critical information to

award recipients and award managers while soliciting their feedback will help mitigate misinformation

and encourage acceptance of the change. Table 6 outlines key milestones which will help keep the CIP

moving at a steady pace and can be used to show LYNU community members success points during the

transition.

Table 6

Change Implementation Plan Milestones

Goals	Milestone 1	Milestone 2	Milestone 3
Short-Term	Identifying key stakeholders.	Having discussions with key stakeholders.	Having in-depth discussions with resistant groups.
Medium-Term	New award policies passed through Senate.	Finalizing implementation details for award policies.	Establishing a communication plan.
Long-Term	Applying new policies to Indigenous student awards.	Applying new policies to remaining LYNU student awards.	Third-order change at other post-secondary institutions.

Informing People About New Roles and Responsibilities

How change is communicated is essential and even the best crafted messages will not be properly received if the wrong channel is used. Many factors must be considered when communicating such as verbal tone, body language, written style, words selected, who is delivering the message, and leaders must remember that even not communicating, is communicating (Angela-Eliza & Valentina, 2018). My communications must deliver the same core messaging but capitalize on opportunities to customize the content to the audiences that are receiving them. Messages to students will highlight the removal of academic conditions from awards and improved access to finances, while messages to award managers will address changes to their existing tasks and highlight new duties since the current work of calculating GPAs and course credits will no longer be required, and award appeals will be non-existent.

Setting up small group meetings will be important when speaking with award managers about operational level details. I will need to meticulously work through the fine points of the changes and reassure people who may be nervous about how the changes will impact their daily work. My adaptive-authentic leadership style guides me to focus on helping people adjust to the new processes as quickly as possible and make them feel supported during the transition by ensuring their questions are addressed and they have clarity in their work.

Clarification of Misinformation About the Change

Even after the change is implemented, I must continue to actively communicate with people. I must focus my efforts on people who are not fully convinced of the change, and on those that still have questions which are causing them to be resistant (Issah, 2018). Finding and winning over key resistors will require a great deal of effort, and I must ensure that positive messaging continues even after implementation. Ending communications prematurely before the new ways have been solidified into the organizational culture could lead to long-term resistance (Kotter, 2006), and I must ask questions that address the root of the issue, while continuing to remain thoughtful to the emotional needs of people.

For the LYNU community, communications in support of this OIP should be kept simple, sincere, and widely shared using different methods such as emails, personal meetings, and group sessions. An opportunity that should not be missed is utilizing face-to-face communications since two-way conversations can improve communication success and offer immediate explanations to questions (Kent & Lane, 2021; Klein, 1996) The communication plan must flow seamlessly throughout the change plan and provide clear and consistent messaging to both campuses.

Framing Key Communication Issues

There will be three key issues that must be adequately addressed during the CIP using well prepared communication materials: (a) student questions on how to access their award funding and how the change supports EDI and social justice inequities, (b) faculty concerns about removing academic rigor from awards and if this will dilute the prestige of the award and deter academic progression, and (c) award manager questions about job changes.

Student award recipients will have questions that specifically pertain to their own unique circumstances and will want details as to how they can access their award funding once the new award policies are in place. In addition to informing about the new funding processes, I must also convey how the changes address EDI and social justice inequities, and how the new award policies provide a built-in process of respect, care, recognition, and empathy (Theoharis, 2007). Students are very caring towards each other and will ask about various situations such as what happens to award funding if they must take time off due to medical reasons, or if they suddenly need to drop out halfway through a course due to an emergency. I will dedicate time to address all scenarios students may have, and although it will be impossible to anticipate every scenario, I will assure students that on rare occasions where an exceptional circumstance occurs, great care will be given to each situation, and all will be reviewed with an EDI and social justice lens.

Faculty questions will concentrate on the integrity of awarding money to students who may not maintain a competitive academic average in their studies. Student award recipients are elaborately celebrated in the university community since award recipients are viewed as being top students who have achieved exceptional academic success. If academic requirements are no longer a condition for a student to receive their award funding, then is the award as prestigious as it appears to be, and would other post-secondary institutions view LYNU award recipients to be less competitive academically?

I will present data to the faculties to show the high instances of LYNU students who already keep their award funding despite falling below the academic threshold. This will demonstrate that students are already keeping their award funding through the appeal process, despite not meeting competitive academic averages. I will also present data showing the successful academic performance of LYNU students receiving award funding through external scholarship organizations that do not require students to meet academic requirements.

Faculty members will also have questions about students' academic progression. They will be worried that students will not graduate in a timely manner which will lead to award budgets being overspent if students take longer to complete their program. Removing academic conditions from awards places the responsibility to graduate within four years onto the student. Students who take a full course load each year tend to graduate within four years and would receive their full award funding. Should students decide to take fewer courses and delay their graduation, that decision will fall to them. LYNU award budgets will not be impacted by students who take longer than four years to graduate. All awards stipulate the maximum amount of award funding that will be paid in equal installments over four years. Students who do not graduate in four years, will have received the full amount of their award, and will be expected to independently find alternative sources of funding through student loans and bursary programs to help financially support them through their final year(s) of study.

Award managers will have complicated questions about how their work will change due to the updates to award policies. Some people will embrace the changes, while others will resist and be fearful of any variation to their job duties. I must communicate very thoughtfully with this group and answer their questions with a caring approach. The changes to award policies will feel awkward at first because change has not occurred in over three decades, and adjusting to the change will occur through social learning and adaptation (Noe et al., 2014). I must help describe what the new work will look like and be respectful of former practices to ease award managers into their new responsibilities such as greater focus on student academic programming and financial planning.

Community Voices

Too often, an institution's public commitment to social justice and EDI issues does not result in any immediate real action given how challenging it is to move away from long-standing norms (Welton et al., 2018), and LYNU leadership must demonstrate courage by introducing change in unconventional areas. I will seek out untraditional groups who may never have had an opportunity to participate in award discussions and prioritize voices from Indigenous and racialized student groups. I also want to hear from award groups who have unique perspectives such as disability and athletic award recipients. Many disability awards did not even exist when award policies were first created, and with increased awards focused on equity-deserving students, it is critical for me to gain a broader perspective about award impacts. Nothing can change without communication, and communications will build relationships, opportunities, and adaptability (Angela-Eliza & Valentina, 2018; Noe et al., 2014). This OIP relies heavily on a well-structured communication strategy delivered in a coordinated effort across both campuses. As the change leader for LYNU, I will leverage my existing networks and seek help from community allies who can help me connect with key people and relevant groups.

Change Process Monitoring and Evaluation

Following the change and communication rollout, monitoring and evaluation plans need to be applied to validate if the transition has been implemented as intended. Kaplan and Norton's (1996) balanced scorecard (BSC) model will provide feedback on internal business processes. It is the appropriate model to use at LYNU because it does not place heavy emphasis on financial performance as an indicator for success, and instead focuses on measuring how well award policies are meeting their mission (Akbarzadeh, 2012). While the change plan emphasizes supports to people through the transition, and the communication strategy is intended to change how people think and work, the BSC will help keep the LYNU community focused on critical strategic commitments and provide feedback on the progress toward achieving them (Išoraitė, 2008). Monitoring and evaluation are required to ensure good governance as it provides feedback on the new award policies' effectiveness and will help highlight areas that require improvement.

Monitoring speaks to the continual gathering of data from the inception of the project and using the information to measure the evolution of the change to show success or when to adjust (Trück et al., 2016). Building a monitoring process into the change plan ensures that data is being collected in an ongoing manner which can provide just in time information at various points during the transition. Evaluation measures the data collected during the monitoring process and provides an ongoing systematic and objective assessment of the change to provide useful information to the organization (Trück et al., 2016). Monitoring and evaluation processes can be extremely useful at any stage of a project and can provide empirical evidence to use for internal decision making and reporting.

As the primary change leader, I must build in processes that monitor and evaluate the changes applied to the monetary awards policies at LYNU. I will need to design evaluation questions (Markiewicz & Patrick, 2019) to be imbedded into surveys and create practices within award programs to ensure the continuation of feedback loops even after the change implementation is complete. My adaptive-

authentic leadership style will use the BSC as a tool to measure the effectiveness of the change, and use the information collected to support people and apply continuous improvement efforts.

Effective monitoring and evaluation practices should incorporate ethical considerations which include avoiding conflicts of interest, transparency, accountability, empowerment of the community, independent judgement, impartiality, sustainability, respect, privacy, confidentiality, reporting wrongdoing, due process, and justice (Gopichandran & Indira Krishna, 2013). Any information resulting from monitoring and evaluation approaches that I can use to help make decisions on award policies must be seen as independent and impartial to avoid any criticism from the community (Neumann et al., 2018). If the community feels that information gained from these processes is being used to manipulate policies and procedures, distrust will form, and the change implementation will face major interruptions trying to rebuild confidence.

Kaplan and Norton's Balanced Scorecard for Change

The BSC is not an actual scorecard, but a system that helps to identify objectives to connect them to strategic priorities (Kaplan & Norton, 1996), and it will create measurable targets which will directly support the items set forth in the LYNU strategic plan. The BSC is a proven and effective tool used to capture, describe, and translate intangible assets into real value, while allowing organizations to implement their differentiating strategies successfully by focusing on creating value through relationships (Niven, 2006). Developing measurement goals for the BSC will help bring together key members of the community and help build strategic advantages within the awards program (Mackay, 2004). Using the BSC will help me track and assess the progress of changes to award policies, and the BSC fits well with my leadership style, change management plan, and communication strategy.

Implementing the BSC framework into the LYNU award policies requires breaking down goals into bite sized strategies, establishing communications with community partners, and creating a feedback mechanism to evaluate performance and revising strategies when needed (Brown, 2012). Key

performance indicators (KPI) act as the measurement tool that will help determine if goals are being met

and if the change is successful (Sharma, 2016). Having KPI data will allow for assessments to be built to

provide frequent feedback which can show progress and help adjust practices accordingly.

The BSC framework attains its balance by focusing on both financial and non-financial objectives

which are categorized in four general perspectives: (a) financial, (b) customer, (c) internal business

process, and (d) learning and growth (Mackay, 2004), but post-secondary institutions often require

slight modifications in the naming of the perspectives given that many aspects of performance cannot

be measured through financial indicators (Kaplan, 2009). It should be noted, for the purposes of this

OIP, the financial perspectives category will be replaced with *resources*, which will focus on the intended

use of award funding, and the customer perspectives category will be replaced with *stakeholders*, to

reflect a more accurate relationship within a university setting.

Resources

The LYNU monetary award program places importance on improving access to post-secondary

education for equity-deserving student groups. There are varying degrees of accountability to donors,

students, and government, who all directly and indirectly provide funding to the award programs

through donations and tuition payments. To ensure funding for awards are being used properly, I must

be able to measure and show that money has been directed to students that support the intention of

the donor, offer awards within our assigned budget, and align award offers to students from equity-

deserving groups as indicated in the LYNU strategic plan (LYNU, 2018).

The use of both lagging and leading indicators will help provide a holistic assessment on the

current state (lagging) and predictive state (leading) of the award policies and will help show me an

accurate forecast if expectations are being met. "Lag indicators represent the consequences of actions

previously taken, while lead indicators are the measures that lead to - or drive - the results achieved in

the lagging indicators" (Niven, 2006, p. 144). A lagging indicator would review the current number of

qualified equity-deserving students receiving awards, while a leading indicator would show if the projected budget for awards was fully spent without exceeding the target.

Stakeholders

When deciding what to measure for the stakeholder perspective on the BSC, I must first determine who is my intended audience, and understand what they want and need from the change (Ahmad & Kim Soon, 2015). I have identified that the key stakeholders for this OIP would be student award recipients, Indigenous community leaders, and award managers. Using annual surveys, I will capture student award recipient feedback about their level of financial security throughout the term. There would be specific questions in the award recipient feedback survey to ask for insights and sentiments from Indigenous student which could be shared with the Indigenous community leaders through aggregate data. I would also gather information on award recipient academic progress and compare it to progression data from previous years (lagging indicator). All data would be aggregated and shared with Indigenous community leaders and award managers which should help stakeholders feel included, empowered to comment on the change, and build trust through being transparent on the data provided.

Internal Business Process

To ensure changes to award policies are sustained and stakeholder needs are being met, I need to set up assessments of our internal business process. The findings from the assessments will help support the creation of new processes and justify concluding of former procedures. I intend to create and implement internal award manager surveys asking for direct feedback on how the new award policies are impacting operational processes, asking what new tasks need to be created because of the elimination of others, and which of the former processes were closed off. This information can help develop a new job description which would better reflect the new award manager role (leading indicator) and helps to promote open discussions of future changes.

To implement any change successfully the entire community must understand the goal, and the BSC can help to create tangible goals that help people align their individual contributions to the university plan and link their work in direct support to strategic commitments (Mackay, 2004; Niven, 2006). The internal business goals of the BSC are intended to guide the reduction of manual tasks and improve efficiencies resulting from the changes to award policies. Award managers should experience greater increased job efficiency and more job fulfilment due to the changes in their work. Gathering monitoring information, evaluating data, and setting goals through the BSC will help identify areas for development to further increase award manager satisfaction.

Learning and Growth

Objectives associated with learning and growth must include the development of culture and competencies (Ahmad & Kim Soon, 2015). Questions asking if people understand why the change is necessary and do they believe in the new award policies? Or has there been a noticeable shift in organizational culture with respect to award programs and practices, and how is competency and personal development measured? These are all examples of questions that must be incorporated given the difficulties in measuring learning and growth due to its intangible nature (Belle, 2016). Utilizing self-assessment surveys where LYNU award managers are asked about their current level of knowledge (lagging indicator), and then asking the same questions three months and six months later, will help provide a sense of how people are growing, and allows for adjustments as needed (leading indicator).

I must work with award managers to create well defined KPIs which are formed through partnerships with stakeholder groups. Working together helps to measure what is important to the community and ensure alignment with the overall strategy to continue to improve access to the university (Sharma, 2016). I would invite award managers to facilitate group discussions to ask students for their feedback about the changes to award policies, and I would ask award managers to share if they feel supported by LYNU leaders. I would encourage each award manager to create their own

professional development goals and learning agenda in support of the award changes and share it with me to help shape future decisions on where to invest in staff development opportunities.

At LYNU, internally created performance management frameworks are developed in partnership with human resource specialists, individual faculties, and administrative units. This overarching framework supports foundational performance topics like teamwork and job knowledge, in addition to specific work areas. For example, offices that advise students would have a section that measures and develops advising practices. Updating staff performance management goals to align with specific KPI targets can help keep people focused on the change plan and results.

Additional Areas for Consideration

When evaluating and monitoring the implemented changes to award policies, I must be mindful of two items. First, that the implemented changes are not creating new barriers for access, and second, that existing inequities do not remain. The award changes must give students full access to their award funding and any performance-related criteria that are tied to award funding must be removed. I must also focus attention on award managers and guide them to see how their work brings meaning to the students they are trying to help. The award managers are a key group on both campuses and should be regularly consulted so that they can share what students are experiencing. I will pay particular attention to award managers who oversee Indigenous student awards since this is the first group that will be impacted from the changes to award policies and will have a unique perspective. In the future, the award changes will be broadened to other remaining equity-deserving student awards, and eventually to all awards. Thoughtful communications must be shared to help student groups understand why the policies changes are being rolled out gradually, and the importance to prioritize changes to Indigenous student awards.

Recommendations to Change Implementation Plan

The CIP requires me to use my adaptive-authentic leadership style to support both process changes and people through the transition. The key recommendation in support of the CIP is to imbed a robust monitoring and evaluation process into the CIP at the start. This will help me avoid manual data collection later and keep measurement top of mind. Monitoring is used to support management and accountability, while evaluation is designed to improve policies (Markiewicz & Patrick, 2019), and using the BSC model will warn me if processes are off-track or failing and will alert me to adjust the plan. The BSC is a critical tool which can help LYNU translate strategy into action (Išoraitė, 2008) and using surveys, performance management tools, and reports during the change transition will provide me with quantitative information which will allow me to notice irregularities.

Next Steps and Future Considerations

Providing students with access to the award money they were offered and aligning award policies in support of the LYNU strategic plan (LYNU, 2018) is what this OIP intends to accomplish. I will be the key change leader and recruit other community stakeholders to help me lead this change. Assisting people through the transition is the focus of the CIP, and leveraging my adaptive-authentic leadership style and experience with awards will promote the change throughout the LYNU community to help ease emotional and operational concerns. The top-down leadership structure at LYNU makes it easy to identify key stakeholders and can be used to quickly share relevant information through naturally occurring communication channels.

Once the change is implemented, both campuses can move in a coordinated effort towards the same goal. The newly approved award policies would replace the former policies that held students to academic conditions to receive their funding, and the new policies have been passed through both university Senates which makes it difficult to revert to former practices. I am intentional in my recommendation to prioritize changes to Indigenous student awards and anticipate a positive outcome

when the changes are implemented. It is my hope that people see the positive results after the first year

of launch, and then I will be able to apply the updated policies to the remaining awards to benefit other

equity-deserving students.

Studies have shown that students graduating with a post-secondary degree historically earn

more overall in their lifetime than those without a degree, and have higher employment rates (Scott-

Clayton, 2015). With the changes to award policies, my hope is that students can focus on their studies

and complete their program in a timely manner without having to worry about money. My long-term

ambition is to show post-secondary institutions across Canada the positive outcomes of removing

academic requirements from award funding and inspire them to examine their monetary award policies

and consider updating their practices. I want award communities to take notice of what LYNU leadership

is doing with awards and encourage them to question their institutional award policies and its alignment

to EDI practices. I would share LYNU results with the post-secondary community at conferences and

show the outcomes of the change with the use of data and student testimonials.

Chapter 3 Summary and Conclusion

In this chapter the changes to award policies have been implemented and the LYNU community

is transitioning to the new practice. My adaptive-authentic leadership approach continues to focus

supporting people through the transition and is woven throughout the change and communication

strategy. Applying Lewin (1951) and Bridges' (2009) change framework further keeps the attention to

supporting the emotional needs of people, while using community feedback to help improve the change

transition. Keeping open lines of communication with the community will allow people to voice their

concerns and allow me to adjust things as needed. Using a BSC to assess the changes to the award

policies will further support people as the KPIs created will be associated with personal performance

goals which tie to the university's success. Being transparent while sharing successes and challenges

with the LYNU community will keep both campuses engaged and build trust in future efforts to improve

EDI and social justice practices.

The greatest takeaway from this OIP is reminding the LYNU community to regularly review and

revise policies that make life difficult for equity-deserving students and help improve situations which

exacerbate the divisions between students from diverse backgrounds (Jack, 2020). Three decades have

passed since any substantial change was made to the monetary awards program at LYNU, and there are

still many areas where improvements can be made. I must personally use this change opportunity as a

catalyst to further explore other areas to remove barriers to access, and make the university experience

an equitable area for students to grow, learn, and develop.

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Appendix A: 2015 – 2021 LYNU Reports of Concern

Type of Report	Number of Reports
Academic Concern	337
Mental / Emotional Wellbeing	445
Conduct / Behavioral	32
Physical Health Concern	79
Safety Concern	86
Financial Concern	597
Other	44

Note. This data is manually collected by LYNU administration staff and access is limited. All data is stored within internal drives which are password protected, and data has not been published. (Confirmed with Western University Writing Support Centre on Feb 14, 2023 that reference/citation is not required since it refers to the collection of my institutional data which has not been used in any other publication, and is not accessible by others).

Appendix B: LYNU Award Appeals Data

Year	Medical Reasons	Faculty Support	Other Reasons	Total Appeals	Denied	Approved
2012	56	70	62	188	8	180
2013	62	66	54	182	12	170
2014	52	62	68	182	10	172
2015	49	62	52	163	13	150
2016	54	70	68	192	11	181
2017	64	64	60	188	14	174
2018	60	58	74	192	9	183
2019	58	70	60	188	11	177
2020	76	80	66	222	0	222
2021	60	72	56	188	8	180

Note. This data is manually collected by LYNU administration staff and access is limited. All data is stored within internal drives which are password protected, and data has not been published. (Confirmed with Western University Writing Support Centre on Feb 14, 2023 that reference/citation is not required since it refers to the collection of my institutional data which has not been used in any other publication, and is not accessible by others).

Appendix C: Change Planning and Actions

Change Stage	Change Action
Stage 1: Unfreeze (LCM)	Timeline: September to January. Innovative ideas are introduced, and consultation must take place. New policies must be socialized, and immediate concerns addressed. Focused discussions with the Indigenous community must be prioritized and unique needs of Indigenous students need to be fully articulated from both campuses.
Stage 1: Ending, Losing, Letting Go (BTM)	Timeline: September to January. People's emotions will be running high as change often creates stress. People will require support especially from leadership and should be invited to have discussions and ask questions. People must let go of the old practice, find a way to move past their feelings of loss, and prepare for the change.
Stage 2: Change (LCM)	Timeline: February to April. Changes are implemented and the detailed questions regarding how to apply the new policies and changes to operational processes must be addressed.
Stage 2: The Neutral Zone (BTM)	Timeline: February to April. Changes are implemented and the former process has been eliminated, but the new operational process has not been fully accepted. People must learn the new policies/practice while letting go of former practice.
Stage 3: Refreeze (LCM)	Timeline: ongoing from May. New award policies and practices are implemented for Indigenous student awards. Since the policies have been passed through Senate, award managers cannot default back to the previous award practices and must move forward with the recent changes.
Stage 3: The New Beginning (BTM)	Timeline: ongoing from May. People are coming out of the transition and starting to develop their new identity and find new purpose to their work. New energies will grow, and information should be shared to show the benefits of the change and alignment to the LYNU strategic plan and commitment to Indigenous students.

Appendix D: Anticipated Questions from Stakeholders

Questions

Q.1	Why is it necessary to change how monetary awards are governed? What is the root issue this solution is trying to address? Will this solution solve the root problem?
Q.2	Will this solution potentially (and unintentionally) sabotage greater efforts happening at LYNU that affect other aspects of monetary awards or EDI activities? Is this solution in alignment with university priorities?
Q.3	Who has been consulted regarding this change to awards, and who else will be additionally consulted? Are there any stakeholders that should be included in discussions but are unable to participate? What is the timeline for consultations?
Q.4	Is the recommendation the only solution? What other options have been considered and why are they not suitable? Is this a solution that must be implemented now? Or can this wait? Is the recommended solution too narrow in scope? Will this solution be irrelevant after a few years or is it sustainable long-term?
Q.5	Why is LYNU wanting to change award policies at this point? If this issue is serious and requires immediate attention, why have we waited so long to seek a solution? Are we currently aware of any stakeholders that are unsupportive or have serious objections? If so, what are they?
Q.6	How do we ensure the post-secondary community (across Canada and internationally) continues to view monetary awards at LYNU to hold their same prestige if competitive GPAs and credit load minimums are no longer a condition to receiving award funding? Have we asked faculties and students if GPA and course load minimums are important to receive award funding?
Q.7	Is current LYNU award governance practices unfair to students? Has LYNU unknowingly discriminated against students or acted unreasonably because of our current award policies?
Q.8	Are there any foreseeable financial implications to the award budgets? Would changing how awards are governed lead to LYNU ending each fiscal year under/overspent from the award budget?
Q.9	Why is this solution being introduced in phases (e.g. Indigenous awards first) rather than applied to all student awards at the same time? Would we allow other students to be governed under the new policies if there are exceptional cases?
Q.10	Given the anticipated reduction in work for many award managers that currently spend time calculating GPAs, review credit loads, deal with student award appeals, etc. will there be job losses or a reduction in staff because of decreased administrative work. If not, what will replace the work?

Appendix E: Lavis et al. (2003) Five Questions for a Knowledge Transfer Strategy

Questions	Descriptions
What should be transferred to decision makers (the message)?	At LYNU, the main message that must be conveyed is that updated policies and practices to monetary awards is a necessity. Changes recommended through this OIP will increase student access to their award funding, remove academic barriers, and promote EDI and social justice commitments outlined in the university strategic plan. The recommendation to prioritize changes to Indigenous student awards will help support the LYNU Indigenous strategic plan. Focused discussions with the Indigenous community must address the unique needs of Indigenous students from both campuses.
To whom should research knowledge be transferred (the target audience)?	The wider the audience, the more successful making changes will be as multiple opinions and questions can be considered. The target audience will be the Indigenous community, student award recipient, faculties, and award managers across both campuses to allow for a fulsome discussion. People's emotions will be running high as change often creates stress and by offering the key audience early opportunities for discussion, this can allow for questions and more information to be shared.
By whom should research knowledge be transferred (the messenger)?	The main message should be communicated by me, as the lead change agent, and it must be officially known that executive level support has been secured. It would be effective to identify a key Indigenous leader to help promote the change within the Indigenous community. I would provide a template for presentation and speaking points.
How should research knowledge be transferred (the knowledge-transfer processes and supporting communications infrastructure)?	This knowledge needs to be shared through meetings, written communications, and community discussions. All academic research should be made available, along with a written document that provides the data and statistics. Communications must be done throughout the change plan, and multiple formats of meetings must be provided. Some tactics will be to hold personal meetings, while other larger discussion groups will be effective. The communications must be consistent, relevant, and transparent to ensure people trust the information.
With what effect should research knowledge be transferred (evaluation)?	Surveys and feedback loops can be used to ask for feedback on academic research use and learning effectiveness. Key participants from the faculties should be interviewed asking if they found the academic research was properly applied, while students and award managers can be asked if they found the academic research useful, and/or if it was a key factor in their decision making.