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## Anti-Exclusionary Leadership: Increasing the Achievement of Marginalized and Minoritized Students in an Ontario High School

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## **Abstract**

This Organizational Improvement Plan (OIP) seeks to address the underachievement of marginalized and minoritized students at an Ontario secondary school. Using critical theory, the OIP recognizes that systemic barriers, the pervasive neoliberal performativity agenda, and educator biases and practices combine to reinforce stubborn inequities that negatively impact students who are racialized, poor, and/or identified as having special educational needs. The term anti-exclusion is used to propose an activist stance that challenges inclusion's connotations of assimilation into a dominant culture. Addressing inequities in a publicly funded, top-down school district context requires adaptive leadership to foster collaborative professionalism while interrogating the status quo, ensuring alignment with system directives, and leveraging competing priorities in support of the change vision. Therefore, the Change Path Model is identified as an appropriate framework to guide the structuring, implementation, communication, monitoring and evaluation of change due to its open systems perspective that views organizations as complex entities that interact with their environments. Department head leadership is selected as the change solution, and the OIP suggests that if department heads fulfil the potential of their roles in support of anti-exclusionary education, the resulting changes in professional culture will lead to increased achievement for marginalized and minoritized students. As such, the change implementation plan focuses on building department head capacity, both individually and as a team. The interrogation of implicit biases is central to the plan, as are mechanisms for student input.

*Keywords:* adaptive leadership, anti-exclusion, collective teacher efficacy, department head leadership, equity, school culture

## Executive Summary

This Organizational Improvement Plan (OIP) seeks to challenge inequities at Chelsea High School (CHS, a pseudonym), a semi-rural Ontario secondary school with 780 students in grades 9 to 12. The problem of practice (PoP) is the stubborn underachievement of marginalized and minoritized students, especially those who are racialized, poor, and/or identified as having special educational needs. Crucially, the PoP reflects broader social trends (Brown et al., 2020), and the OIP uses a critical theory epistemology (Capper, 2019) to argue that deeply entrenched social barriers (James & Turner, 2017; Ray, 2021) are reflected in teachers' mindsets (Benson & Fiarman, 2020), expectations (Cui, 2017) and biases (James & Parekh, 2021; Parekh et al., 2021). These combine to undermine student success at the local level. As such, the OIP coins the term anti-exclusion to describe an activist stance focused on interrogating barriers and educator complicity in upholding them, while working to build equitable schools. Although the term inclusion is used globally in education (Paliokosta & Blandford, 2010), anti-exclusion challenges its assimilatory connotations.

The OIP proposes that adaptive principal leadership (Heifetz et al., 2009) will motivate and mobilize teachers to interrogate their implicit biases and adopt new practices. Adaptive leadership recognizes that change is complex, iterative, and involves the management and leveraging of multiple competing priorities (Heifetz et al., 2009). This is especially important because principals lead from the middle (Kaul et al., 2022), operate as agents of the board tasked with implementing system-level policies (Leithwood, 2013), and follow a prescribed leadership framework (Riveros et al., 2016). As such, this OIP considers how to align anti-exclusionary priorities with provincial- and board-level strategic directives.

A key challenge at CHS, and an important consideration of the OIP, is entrenched non-collaborative teacher practice that was exacerbated during the COVID-19 pandemic. As the school continues to reorient itself following health and safety protocols that kept teachers apart, it is necessary to foster change readiness among staff (Wang et al., 2020) through the development of collaborative professionalism and collective teacher efficacy (Donohoo, 2017). Indeed, cultivating collaborative cultures is a key change driver that, along with focused direction, deep learning, and internal and external accountability, will support school-level coherence (Fullan & Quinn, 2016) in support of marginalized and minoritized students.

Therefore, the vision for change includes shared teacher ownership of, and responsibility for, the anti-exclusionary agenda. Teachers must critically engage with their professional knowledge (Hargreaves, 2006) to disrupt oppressive practices (Ray, 2019), and this will increase the school's capacity for improvement (Meyer et al., 2022). Student input is central to change while recognizing that the work is the responsibility of educators. As such, cogens – small-group, semi-structured conversations with targeted students – are recommended as an important data source as the change progresses (Safir & Dugan, 2021).

This complex work requires a tight-but-loose structure (Trask & Cowie, 2021) that provides clear, measurable goals but enough flexibility to allow individuals and teams to engage according to their learning orientations ((Novak & Rodriguez, 2016). As such, the Change Path Model (Deszca et al., 2020) is selected as a guiding framework due to its clear, linear structure that nonetheless allows for ongoing problem diagnosis and iterative changes as plans are implemented.

The chosen solution to address the PoP focuses on department head leadership, recognizing that the role is underutilized yet has significant potential for school

improvement (Dinham, 2007; Leithwood, 2016). Building a coherent department head team (DHT) in support of the change agenda is suggested as a first step in shifting school culture due to department head influence and credibility among staff (Lomos et al., 2011). Following deep DHT reflection to interrogate implicit biases, Katz et al.'s (2018) revised inquiry framework will be used to structure and support department head goal setting and action that aligns with the OIP's goals. The aim is to foster iterative change at the department level that is both attentive to departmental subcultures and accountable to the DHT and school administration, while simultaneously building department head capacity and staff cohesion.

The Change Path Model forms the basis of a Change Implementation Plan (CIP) designed to shape the necessary work into a year-long cycle. Recognizing that stakeholder management and engagement are key to the OIP's success, a Strategic Communication Plan (SCP) aligns with and augments the CIP. Lastly, monitoring and evaluation strategies are described. These provide opportunities to refine the process at each stage of the change path journey.

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## Acronyms

BSP (Board Strategic Plan, a pseudonym)

CHS (Chelsea High School, a pseudonym)

CIP (Change Implementation Plan)

CRRP (Culturally Responsive and Relevant Pedagogy)

CTE (Collective Teacher Efficacy)

CTI (Collaborative Teacher Inquiry)

DHT (Department Head Team)

EIE (Equity and Inclusive Education)

EFP (Equity First Plan, a pseudonym)

EQAO (Educational Quality and Accountability Office)

IDC (Irreversible Delivery Culture)

IEP (Individual Education Plan)

KPI (Key Performance Indicator)

NPM (New Public Management)

OIP (Organizational Improvement Plan)

OLF (Ontario Leadership Framework)

OME (Ontario Ministry of Education)

PESTE (Political, Economic, Social, Technological, and Environmental)

PoP (Problem of Practice)

SCP (Strategic Communications Plan)

UDSB (United District School Board, a pseudonym)

UDL (Universal Design for Learning)

## Definitions for Ontario's Educational Context

**Adaptive Leadership:** A leadership approach that mobilizes people to manage complex, iterative change initiatives in an evolving environment (Heifetz et al., 2009).

**Anti-Exclusion:** A social justice-oriented, activist stance that challenges inclusion's connotations of assimilation into a dominant culture. This term was coined by the author during the writing of this OIP.

**Coherence:** A shared understanding about the nature and purpose of work that integrates diverse perspectives to achieve shared goals (Fullan & Quinn, 2016).

**Collective Teacher Efficacy:** The collective self-perception that teachers in a particular school community can have a positive impact on students, regardless of those students' backgrounds and experiences (Donohoo, 2017).

**Critical Theory:** A social justice-oriented epistemology that challenges inequity, oppression and marginalization within organizations (Capper, 2019).

**Department Head:** A formal secondary school leader with a full-time teaching load who is responsible for curriculum and resources in a specific subject area and is paid a responsibility allowance.

**Equity:** The principle that all students, regardless of their personal stories and circumstances, should have the opportunity for academic and personal success (Ontario Ministry of Education, 2017).

**School Culture:** The shared staff personality within a school that evolves over time to influence morale, reinforce values and beliefs, and determine how things are done in given situations (Gruenert & Whitaker, 2015).

## Chapter 1: Introduction and Problem of Practice

This Organizational Improvement Plan (OIP) seeks to improve educational outcomes for marginalized and minoritized students in an Ontario secondary school and is grounded in a critical theory epistemology that recognizes schools as sites of tension: while formal education often reinforces systemic barriers through its policies, structures and operations (Cui, 2017; Parekh et al., 2020; Pomeroy, 2020; Ray, 2019), it can also be a force for positive social change (Dei, 2014; Hattie, 2015; Sarid, 2021). In navigating this tension, principals must “act as vital sources of resistance... [while pushing for] alternate ideas, and transformation within their organization” (Meyerson & Scully, 1995, p. 586). Therefore, this OIP recognizes that the principalship is fundamentally political (Winton & Pollock, 2013), involving engagement at the individual, school, regional and societal levels (Fullan, 2003). Political imperatives need strategies if school-level change is to occur (Fullan, 2003), so the work of this OIP will develop such strategies to support students on the margins.

Through educator action and student participation, these strategies will be explicitly anti-exclusionary. I use this term deliberately and with Bacci’s (2017), Fairclough’s (1992), and Galloway et al.’s (2019) work on semantics and discourse in mind. While the pervasive talk of inclusion (Rezai-Rashti et al., 2017) suggests the assimilation into a dominant culture, the intent of anti-exclusion is to propose an activist stance. This recognizes that exclusion is “structured into the educational system” (James & Parekh, 2021, p. 69), and involves persistent self-awareness and self-interrogation (Kendi, 2019) to confront the inequities that privileged educators perpetuate through our attitudes and actions (Cui, 2017).

In this first chapter, my positionality, leadership lens and organizational context will be shared to help frame the Problem of Practice (PoP). Next, the PoP itself will be introduced, along with key guiding questions and a leadership-focused vision for change.

### **Leadership Positionality and Lens**

As a high school principal in an epistemologically functionalist organization, my role has structural authority at the school level that is codified in Ontario's Education Act (2012) and has a long history of enactment (Rousmaniere, 2013). In hierarchical organizations, power is concentrated in individuals (Rottman, 2007), and the principal has symbolic power (Bourdieu, 1979) as the formal school leader. In Ontario schools, principals and vice-principals are the only non-unionized employees and the highest paid, thus reinforcing the labour-management dichotomy. The large body of research into the principal role (Rottman, 2007) reflects and reinforces the role's positional power, as does the Ontario Leadership Framework (Leithwood, 2013) with its focus on the individual actor. However, Ontario principals are agents of the board and responsible to district-level senior management. As such, I lead from the middle (Hargreaves & Shirley, 2020; Kaul et al., 2022).

As principal, I am responsible for the operation of my school, from health and safety to human resources to finances. For example, the Ontario Education Act (2012) notes that the principal must develop and disseminate school action plans for improvement, develop a code of conduct, and supervise and appraise all staff.

Ontario's conceptualization of the principal role is reflected in the Ontario Leadership Framework (OLF), which views leadership as "the exercise of influence on organizational members and diverse stakeholders toward the identification and achievement of the organization's vision and goals" (Leithwood, 2013, pp.12-13). The OLF includes five key

domains: setting directions; building relationships and developing people; developing the organization to support desired practices; improving the instructional program; and securing accountability. It also includes a series of cognitive, social, and psychological resources that can be learned over time and reflect the Skills Approach to leadership (Northouse, 2019). With its instrumental focus, the OLF proposes a tightly managed professionalism that, coupled with a delivery model of leadership, circumscribes opportunities to engage in social justice-oriented work (Newton & Riveros, 2015). Rather, the OLF fosters the enactment of competencies that lead to incremental change. Nonetheless, creative principals can leverage the potential for action at the outer boundaries of their prescribed role (Drysdale & Gurr, 2017); although it is worth noting that this must happen in the context of ongoing work intensification (Wang, 2018) that sees principals spending more of their time on operational tasks (Sebastian et al., 2010). As such, creating conditions for school-level change (Smith-Maddox, 1999) is a necessary focus of this OIP.

As a white, heterosexual male, I am a typical Canadian principal (Cui, 2017). However, I do not wholly identify as one. Instead, I see myself as a member of the English working class, an immigrant and an “imposter” (Hargreaves, 2019, p. 31) who does not really belong, and whose fundamental frames of reference are outside the context in which I work. I moved to Canada as an adult, and my outward privilege does not reflect my positionality: I sometimes feel as if I am occupying someone else’s role. As such, I am aware of my tendency to fixate on issues of social class, reflecting English taxonomies and priorities (Pomeroy, 2020). I must be cognizant of this bias as I address this OIP, because paying disproportionate attention to certain inequities means others are ignored (Pomeroy, 2020).



Perhaps because of my own (free, British) education and my personal trajectory, I believe in schools as mechanisms for social mobility (Hargreaves, 2019). As a parent and spouse in a mixed-race family, I also recognize the profound advantage of Whiteness in that mobility (see, e.g., Eddo-Lodge, 2017; Hirsch, 2018). I believe that all children will learn if they can (Greene, 2014), and educators must create the conditions for student success. We know that our work has the power to help students overcome socio-economic disadvantages (Hattie, 2015), and we must take shared responsibility (Le Fevre et al., 2020) for ensuring that it happens. Indeed, we have a moral imperative (Fullan, 2003) to free students from alienation (Gioia & Pitra, 1990) and oppression (Freire, 2000). This entails the ongoing interrogation of our practice, the deliberate removal of barriers to learning, and constant reflection to ensure we do not inadvertently reinforce those barriers. Educators working in community must inhabit a state of productive discomfort as we constantly challenge ourselves to do better (Hargreaves & Fullan, 2012), explore our biases and blind spots (Choudhury, 2021) and ensure we do not put our own comfort ahead of student needs (Campbell, 2021). Collaborative practice is essential, and its efficacy is supported by a vast body of literature (Shirley, 2016). My role as principal is to create the conditions for this to occur, while recognizing that, as a middle-aged man in a shirt and tie, my positional power implicates me in the structural oppression I strive to address.

### **Conceptual Framework**

Currently, education's macro-level focus on competition and individual choice (Srivastava, 2010), coupled with a pervasive gap-closing rhetoric, sidelines the needs of racialized and minoritized students (Martino & Rezai-Rashti, 2013). However, the impacts of systemic underachievement are well-documented in Ontario (James, 2019; James & Turner, 2017; James & Parekh, 2021), including "long-standing colonial practices that have profoundly

affected many Indigenous people” (Cote-Meek, 2017, n.p.). Yet in classrooms, educator biases and oppressive curriculum and assessment continue to favour the middle-class white majority (Cui, 2017). Therefore, I approach this PoP with a critical theory epistemology (Gillborn et al., 2018) that maintains an “intellectual closeness to struggle” (Dei, 2014, p. 247). Capper (2019) notes that critical theory has six core principles: first, a concern for suffering and oppression; second, a critical view of education; third, a focus on reuniting facts and values with social justice goals; fourth, an emphasis on power between the oppressor and the oppressed; fifth, the disruption of power through communication; and sixth, “dialogue, praxis, and leadership as a political act” (p. 69). Critical theory supports an interrogative stance and disrupts the pervasive neoliberalism that frames the work of the Ontario school district described in the Organizational Context section of this document.

A secondary theoretical lens, social constructivism (Czeh et al., 2013), focuses on learning that stems from interactions with others (Miller-Young & Yeo, 2015). It recognizes both the creation of knowledge through introspection and communication (Hirtle, 1996), and the insidious influence of deep-seated biases and prejudices on shared meaning-making (Milner, 2008; Kendy, 2019). As such, it is a valuable perspective when considering collaboration, school climate and culture. Together, critical theory and social constructivism will frame the interrogation of inequity and form the basis of the conceptual framework for this OIP (see Appendix A).

### **Leadership Approach**

The Adaptive leadership approach (Heifetz et al, 2009) is particularly relevant to an OIP that involves seeking out and leveraging opportunities for anti-exclusionary practices in a tightly structured organization with a tacitly neoliberal agenda. Adaptive leadership provides a model

for interrogating the gap between espoused school district values (equity) and teacher behaviour (inequity).

The work of this OIP is an adaptive challenge (Heifetz et al., 2009) because it involves the potential upheaval of beliefs and values within a pre-existing neoliberal framework. Adaptive leadership will involve mobilizing staff (Northouse, 2019) to address the questions, concerns, and multiple perspectives involved in coming to terms with and addressing inequity. Crucially, my leadership role will be supportive rather than directive (Northouse, 2019) if it is to lead to cultural change.

As the school community explores its role in oppression, it will be important to regulate distress (Heifetz et al., 2009) while maintaining the productive discomfort necessary to do the work (Hargreaves & Fullan, 2012). This will involve the creation of a holding environment for diagnosing needs, mobilizing resources, and managing conflict (Heifetz et al., 2009). As an adaptive leader, I will maintain this holding environment as a space for interaction while the work of change is done.

Adaptive leadership aligns with critical theory because it undermines the leader/follower dichotomy through its focus on exploratory interaction rather than hierarchical control. It also protects voices from below, especially the marginalized (Northouse, 2019). While the link between justice-oriented work and adaptive leadership is not well established (Northouse, 2019), there are examples in the literature of adaptive leadership strategies supporting anti-exclusionary agendas. For example, Connolly et al. (2020) discuss how one school district in the United States used adaptive leadership tools to successfully implement a complex equity policy.

The creation and management of the holding environment will not happen in a vacuum, but in a busy school with multiple competing priorities (Katz et al., 2018). In the face of such

challenges, my role will be ensuring staff remain energized by, and focused on, the plan so that permanent change can occur (Katz & Dack, 2013).

### **Organizational Context**

Global trends impact micropolitical issues at the school level (Crow & Weindling, 2010). Therefore, principals must understand and critique their multiple political contexts to effectively lead change (Winton & Pollock, 2013) while recognizing their roles as agents of centralized power (Riveros et al., 2016). As such, this overview of my organizational context will draw attention to broad, ongoing tensions between oppression and reconciliation (Lopez, 2018). I will then consider the impact of the global neoliberal polycscape (Mettler, 2016) on the educational context in Ontario, where particular attention will be paid to the provincial equity agenda. From there, I will explore the relationship between the United District School Board (UDSB, a pseudonym) and its influence on the site of this OIP, Chelsea High School (CHS, a pseudonym).

### **Oppression and Reconciliation**

The work of this OIP takes place during a time of upheaval and unrest. While the rise of the far right (Osler & Starkey, 2018) and the ongoing impacts of the recent pandemic conspire to foster inequity and exclusion (Glover et al., 2020; González & Bonal, 2022), the influence of the Black Lives Matter Movement, increased racial and cultural diversity across North America (Lopez, 2017), and the fact that “dispossessed and marginalized peoples all across the globe are calling for greater equity and social justice” (Lopez, 2018, p. 198) are creating momentum for change. Although Canadian institutions are responding to reconciliatory imperatives (Pardy & Pardy, 2020) to address “the horrors and harsh lessons of colonialization” (Battiste, 1998, p. 16), exclusion remains structured into the education system (Battiste, 2013; James & Parekh, 2021)—something that global neoliberal priorities fail to address (Singh, 2019).

## **Global Neoliberalism and the Co-option of Equity**

The pervasive global ideology of neoliberalism (Anderson & Herr, 2015; Srivastava, 2010) views education as a sector of the economy (McClaren & Farahmandpur, 2001) and co-opts equity as a strategy for both economic competitiveness (Rezai-Rashti et al., 2017) and accountability (Sklra et al., 2001). The global focus on the OECD's PISA scores, which rank education systems according to performance on standardized tests (Rezai-Rashti et al., 2017; Zhao, 2015), results in a decontextualized, outcome-focused understanding of equity (Steiner-Khamsi, 2014). Within this context, Ontario operates using a neoliberal understanding of education based on metadata, efficiency, and accountability (George et al., 2020) that elides systemic inequities (Martino & Rezai-Rashti, 2013). Meanwhile, diversity is cast as "an economic resource" (Rezai-Rashti et al., 2017, p. 165) in which inclusive education supports a strengthened economy (OME, 2009). This monetization co-opts social justice in support of competition and choice (Srivastava, 2010) and essentializes and exoticizes diversity within the Canadian multicultural paradigm (George et al., 2020).

## **Ontario's Equity Mandate**

It is within this context that Ontario's Ministry of Education sets the equity agenda through top-down policy directives (Shewchuk & Cooper, 2018). The previous Liberal government (2003-2018) introduced policies in support of LGBTQ2S+ students (Accepting Schools Act, 2012), Indigenous learners (OME, 2007), and mental health and wellbeing (OME, 2013). In 2017, the province launched Ontario's Equity Action Plan (OME, 2017) with the goal of "identifying and eliminating discriminatory practices, systemic barriers and bias from schools and classrooms to support the potential for all students to succeed" (p. 4). However, George et al. (2020) criticize the steady erosion of activist language from provincial policy, and the failure of

policy to recognize the structural problems that exist in the education system itself. Unless the role of existing structures in upholding inequities is acknowledged and addressed, oppression will persist (Ray, 2019).

In addition to provincial-level policies, the Ontario Ministry of Education also mandates policies that regional school boards must create and enact. Equity and Inclusive Education (EIE) policies are one example. While many of these local policies do not address critical issues such as ethno-cultural discrimination and socio-economic status (Shewchuk & Cooper, 2018), James and Turner's (2017) report on the schooling of Black students in the Greater Toronto Area, *Towards Race Equity in Education*, focussed provincial attention on structural inequities in Ontario's schools (Howell, 2022). Since then, Peel District School Board's activist-oriented Anti Racism Policy (PDSB, 2022), and Toronto District School Board's Supporting Black Student Achievement and Dismantling Anti-Black Racism (TDSB, 2020) are two recent examples of policies that name and address a specific structural barrier.

A key shift in 2022 was the de-streaming of grade 9 classes on the grounds that disadvantaged students were typically placed in less academic classes due to low teacher expectations (OME, 2022). The risk in professional practice is that educators will teach to the middle rather than supporting all learners (Haimes, 1999). This requires school and system-level leadership to develop teachers' abilities to equitably differentiate instruction.

### **United District School Board: Mission, Vision, and Values**

The focus of this OIP is a single Ontario high school that must navigate this policy context. CHS is one of 5 secondary schools within the UDSB, which also operates over 30 elementary schools. UDSB spans three small cities and several small towns and rural communities over a large geographic area. It serves over 12,000 students from a wide variety of

socio-economic backgrounds, but the region is 75% White (Statistics Canada, 2019), as are most board employees.

The Ontario Education Act (2012) dictates the management structure of the UDSB and its schools; and it reflects a structural functionalist epistemology (Capper, 2019) that encourages incremental, linear change within a tightly structured bureaucracy (Sleeter, 1991). The Director of Education (the only employee of an elected Board of Trustees) and a small cohort of superintendents make up the senior leadership team which sets the direction of the board, supervises schools, and reports to Trustees. Unlike some larger districts with dedicated Superintendents of Equity, senior leaders at UDSB have large, multifaceted portfolios. Until recently, the equity lead at the board was a special assignment teacher (SAT) with a variety of other responsibilities, but this changed in 2021 when Equity was added to a superintendent's title. The foregrounding of the portfolio at the senior management level is a structural and symbolic shift (Bolman & Deal, 2021) that results in equity being a key part of school improvement conversations, and an agenda item at all principal meetings. Indeed, equity is increasingly evident in the board's work, including the 2021 Board Strategic Plan (BSP, a pseudonym). This document guides all district activities: annual school improvement plans must reflect BSP priorities and include an equity goal. BSP foci include equity, achievement, and resource management, and must be viewed in the context of the board's mission and vision. The mission is to build learning communities where each member is loved, inspired and successful, and the vision is of a world where all are empowered to reach their full potential (UDSB, 2020).

A new board Equity First Plan (EFP, a pseudonym) (2020-24) is linked to the United Nations Sustainable Development Goals and includes actions such as developing inclusive language and embedding trauma-informed practices. Parallel to this is ongoing board-level work

to embed Universal Design for Learning (UDL) across the system. This model works towards a student-centred classroom experience designed to reach every learner (see CAST, 2023).

However, the pervasive district-level focus on all students and each learner is “not specific to eliminating inequities” (Capper, 2019, p. 60), but reflects an interpretivist epistemology that does not problematize the existing social order (Capper, 1993).

Despite this, equity conversations are central to Board Leadership Meetings (monthly gatherings of school administrators and the senior team), Family of Schools meetings (in which principals of partner schools meet with their superintendent) and the Principal Performance Appraisal process. UDSB is beginning to explore and address implicit teacher biases, deficit thinking, and culturally responsive and relevant pedagogy (CRRP) through workshop-based professional learning with external consultants.

### **Leading for Equity at CHS**

I was appointed principal of CHS in September 2020 tasked with the instrumental goal of raising poor EQAO scores. Although the school is situated on the edge of a small, semi-industrial city, the majority are of students are bussed in from small, rural communities some distance away. Over 90% of students are White settlers. CHS is a popular choice for families, and enrollment increases annually. Almost half of the student population transfer from non-partner schools in the co-terminus board, and competition between schools is a regional norm.

CHS employs 50 full-time equivalent teachers and 16 support staff. A full-time vice principal supports me in my role as principal. There are seven curriculum department heads who form the rest of the formal leadership team, but their roles are circumscribed (Leithwood, 2016): as unionized employees, they advise but cannot supervise colleagues.



The school offers the Ontario Secondary School Diploma, but no special programming such as the International Baccalaureate or Advanced Placement. Rather, a focus on experiential learning recognizes the many local opportunities for industrial work and trades. Programming in support of Indigenous learners is strong, and there are nascent partnerships with the local Mohawk community. All students at UDSB study the Contemporary First Nations, Métis, and Inuit Voices course in Grade 11.

Privatized practice and low academic expectations affect the school. The school Visioning Team (VT), which I started during the 2020-21 school year, solicited feedback from all key stakeholders and revealed a school where there are some positives—the school is welcoming and collegial—but little professional collaboration and a sense of apathy among staff and students. However, the fact that 21 staff members joined the VT is a positive sign. Also, eight teachers are engaged in a district-level leadership development program and identify as future leaders. It is also important to recognize the impact of Covid-19 restrictions on morale during this time.

Academically, marginalized students underachieve. Disaggregated school-level achievement data from 2021-22 shows that all students who failed courses face systemic barriers including poverty, racialization, and trauma. Applied level marks (for courses geared towards college and the workplace) are low, but academic level marks (for courses on the university pathway) are unrealistically high and do not correlate with poor scores on standardized tests. Students with special educational needs underperform in relation to their peers, in alignment with other jurisdictions (Parekh et al., 2021). It is worth noting that, at the time of writing, CHS does not support any English language learners.

## **Leadership in the UDSB: The primacy of the Ontario Leadership Framework**

Leadership in the UDSB is increasingly centralized as the Director seeks to build a strong brand to compete with coterminous boards. While leadership theory is not a part of district discussion, the focused enactment of the BSP aligns with what Barber et al. (2011) describe as the creation of an Irreversible Delivery Culture (IDC). With the BSP as the foundation for delivery, the senior team works to understand the delivery challenge, plan for delivery, and drive delivery (Barber et al., 2001, p.1). Results must be measured using Key Performance Indicators, an example of metric regulation that represents a shift towards neoliberal values (Morrish, 2019). Indeed, the IDC model, with its focus on rapid and decontextualized action, risks turning equity goals into instrumental outcomes that fall short of addressing systemic barriers.

Despite this, as principal I am afforded significant latitude to make key school-level decisions in terms of staffing (within union parameters), facility enhancement, and instructional leadership. The key is to ensure that initiatives align, through politically savvy decision-making (Winton & Pollock, 2013), with BSP directives. Despite epistemological differences (my critical theory perspective versus the board's implied instrumentalist interpretivism) the goal of this OIP, which is improve the achievement levels of minoritized and marginalized students, aligns with my task to raise EQAO scores, and my focus on equity aligns with the BSP. The challenge is to ensure that school-based efforts do not reinforce the elision of systemic and intersectional maldistribution (Pomeroy, 2020).

### **Leadership Problem of Practice**

The PoP that will be addressed is the academic underachievement of marginalized and minoritized students at CHS. Students at the school are marginalized through rural poverty, special educational needs, and/or minoritized through racialization.

As principal of CHS, I have significant formal influence for setting directions (Leithwood, 2013), practicing instructional leadership (Meyer et al., 2019), and negotiating and appropriating school policy in support of social justice (Winton & Pollock, 2013). This work occurs within a provincial policyscape (Mettler, 2016) that reflects a global neoliberal perspective focused on efficiency and accountability (George et al., 2020), and in which structural inequity remains a fundamental organizational norm (Dei, 2014; Ray, 2019; James & Parekh, 2021). Educators of privilege often struggle to create inclusive learning spaces due to implicit biases (Choudhury, 2021; Cui, 2017; James, 2019), and commonly perpetuate deficit perspectives when working with marginalized youth (DeMatthews, 2015; García & Guerra, 2004; James, 2019). Further, the various lockdowns during the COVID19 pandemic reinforced existing inequities (Glover et al., 2020). At CHS, a lack of rural internet and adequate technology for online learning disproportionately impacted marginalized youth and led to decreased engagement with school.

School-level achievement analysis at mid-term and at course completion shows how most teachers at CHS consistently award lower marks to students taking applied level courses. These courses, where minoritized and marginalized students are typically placed (James & Turner, 2017; Parekh et al, 2021), were designed for hands-on learners without the requisite skills to study at the academic level (EQAO, 2013). Applied level courses reinforce demographic inequities (Gallagher-Mackay, 2013; James & Turner, 2017), and for this reason were abolished from Ontario's Grade 9 curriculum in September 2022, though they remain for Grade 10 students. At CHS, applied course medians are 20% below those of the academic courses, and students from applied classes are disproportionately sent to the office for disciplinary infractions. The pattern continues at the senior level where streaming remains in place along workplace,

college, and university lines. For example, grades for college level math and science courses are consistently lower than grades for university level courses. This highlights the stubbornness of teacher expectations grounded in student demographics (Clycq et al., 2014; Hernández-Saca, 2019).

As such, marginalized and minoritized students see their status reinforced through policy (Ball et al, 2011; Bacchi, 2017), are disproportionately disciplined at school (Brown & Gallagher-Mackay, 2020; James & Turner, 2017), are disadvantaged due to subjective teacher assessments (James, 2019; Parekh et al, 2021), and suffer in terms of graduation rates and post-secondary access (Brown & Gallagher-Mackay, 2020; James & Parekh, 2021). At CHS, these broad trends are reflected in course failures and the subjective teacher-assigned learning skills recorded on provincial report cards. What school level strategies might address these inequalities to promote equitable learning outcomes for marginalized and minoritized students?

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

Several contextual challenges and opportunities frame this problem of practice. Following a brief discussion of UDSB's professional learning culture, a PESTE analysis will focus on the COVID-19 pandemic's continued impact on the learning environment (Hassan & Daniel, 2020; Robinson et al., 2022).

### **Historical Overview of the Problem of Practice**

At UDSB and CHS, the struggle to gain traction with change-oriented professional learning is a stubborn legacy issue. District-level foci regularly shift due to provincial priorities and related funding envelopes, and the district-level delivery model is top down and managed by special assignment teachers. Also, local initiatives, such as the focus on UDL, compete for time and resources with provincial priorities. Typically, small cadres of champion teachers attend

sessions at the board office and take the learning back to their schools, where it often gets lost. This is typical for change efforts, most of which fail at the level of implementation (Lewis, 2019). Teachers rarely see the connection between system level priorities and their own work, especially when change is rapid; and the resulting alienation (Stone-Johnson, 2016) is evident at CHS, where there is reluctance to participate in central initiatives.

Change at the school level has been limited. In 2015, CHS was subject to a system-level inspection that highlighted next steps for the school including increased collaboration, de-privatized practice, and student-centred learning. These needs are still in place, suggesting that previous district-level and school-based change strategies were unsuccessful.

### **PESTE Analysis**

Multiple interrelated factors influence the work at CHS. This brief PESTE analysis will consider key political, economic, social, technological, and environmental impacts on the school.

#### ***Political Context***

Alongside the neoliberal hegemony discussed earlier, increased right-wing populism (Lopez, 2017; Zembylas, 2022) has an insidious impact on CHS. As a result of mask mandates and associated pandemic measures, the affective atmosphere (Anderson, 2009) at CHS was one of reduced trust and conflict as some parents and community-members used far-right tropes (Osler & Starkey, 2018) to publicly challenge the school, frame public health measures as CHS's attempts to limit freedom, and cause division among students. Rebuilding trust in a fragmented community is an important priority (Timmons et al., 2021). The pandemic also impacted teacher morale (Siler, 2022). CHS is a unionized environment, and Ontario's teacher unions were vocal about the perceived insufficiency of safety measures (OECTA, 2021).

Unionization also circumscribes how school leaders can work with teachers in support of school improvement (Leithwood, 2016). For example, the teacher collective agreement regulates how and when professional learning can be undertaken, unless it is self-directed. This reinforces the need for educator ownership of the change agenda and for adaptive leadership that shifts problem solving away from the formal leader and towards the teachers involved (Heifetz et al., 2009).

### ***Economic Context***

At the provincial level, budget shortfalls predicated on an austerity agenda (Thomas, 2020) mean reduced staffing and larger class sizes. However, CHS is a disproportionate recipient of district-level funds for literacy and numeracy support due to its poor scores on standardized tests. Less positively, inflation is high at the time of writing, and teachers are beginning contract negotiations. If strikes occur, the impact on disadvantaged students will be disproportionately large (Abadzi, 2009).

The COVID-19 pandemic caused unemployment and financial insecurity for many school families. Parents with less flexible jobs, and without formal education, were less able to support their children with schoolwork during remote learning (Timmons et al., 2021), thus reinforcing existing inequities. In particular, the precarious employment status of many Black students and their families (Liu, 2017) makes them especially vulnerable to the aftershocks of COVID 19 (Hassan & Daniel, 2020). The cumulative effects of these economic disparities compound learning inequities for students (González & Bonal, 2021).

### ***Social Context***

CHS is a close-knit school where teachers send their children and where graduates return to teach. Warm, socially connected staff relationships help build community but also reinforce a

“culture of nice” in which educators are reluctant to challenge each other’s beliefs, biases and practices (Katz et al., 2018; MacDonald, 2011). The staff is entirely Caucasian, despite system-level diversification efforts, and there is widespread evidence among staff of naïve colour-blindness that claims not to see race (Gulson & Webb, 2015). However, racism in Canadian schools is well documented (Zinga & Gordon, 2016), and racialized students at CHS report ongoing racism from their White peers.

Meanwhile, a teacher culture that does not interrogate its own biases sees middle-class educators orienting middle-class students towards more academic programs (Seghers et al., 2021), often due to subjective assessments (Parekh et al., 2021). Moreover, in teacher conversations, students are frequently blamed for their own lack of achievement due to socio-economic factors beyond their control, such as parenting or insecure housing, and this reinforces low expectations (Le Fevre et al., 2020). Despite these significant challenges, educator commitment at CHS seems strong, and staff cohesion, though social rather than professional in nature, is a starting point for leveraging change (Drzensky et al., 2012).

### ***Technological Context***

Remote learning requirements during the pandemic forced a reliance on educational technology. Marginalized students suffered from a “leaky pipeline” of course delivery (Harris et al., 2020) due to poor internet access and teachers struggling to navigate the constraints of emergency pedagogy (Code et al., 2022). All CHS staff used a common platform – Desire 2 Learn (D2L) – to deliver their programs. A review of teacher sites foregrounded a lack of consistency, and the remote teaching format reinforced difficulties in teachers’ flexibility to meet the learning needs of all students (Stenman & Petterson, 2019). Assessment procedures in Ontario are grounded in students having multiple opportunities to demonstrate their learning

through triangulated assessment (OME, 2010), but D2L use at CHS reinforced a drill-and-test approach that persists now that in-person learning has returned, and final marks based on D2L-generated averages rather than professional judgement are common. In the current academic year, students are disproportionately deemed to be at-risk because of their performance on knowledge-based tests, reinforcing systemic, assessment-based inequities (Kang & Furtak, 2021).

### ***Environmental Context***

School design is beyond the scope of this OIP. However, minor construction at CHS in summer 2022 included the combining of several classrooms using garage doors, and the purchasing of mobile and flexible furniture to support UDL. These spaces could be leveraged to support the equity agenda. For example, less-traditional classrooms that decentre the teacher provide an opportunity to challenge the power dynamics inherent in traditional “egg crate” environments (Syed, 2022).

### **Relevant Internal/External Data**

UDSB is currently a data-poor district but is working to remedy this through the BSP. However, basic school-level demographic data, triangulated with school climate and achievement data, suggests that the students experiencing marginalization in our community are primarily members of the rural poor, students with Individual Education Plans (IEPs), and/or racialized students (there is limited overlap between these groups). It is important to note that the current lack of systematic data collection means that additional, unknown sources of exclusion and oppression may exist.

Marginalization at CHS is reflected in terms of poor academic achievement, a weak sense of belonging identified in focus conversations and climate surveys, and barriers to engagement



reinforced through teacher practice. In particular, there is a lack of culturally relevant pedagogy and triangulated assessment.

The county in which CHS is located has the lowest literacy rates in Ontario (Statistics Canada, 2019). The school shows a steady decline in literacy and numeracy since 2011 according to provincial EQAO tests and is now the lowest in the district by a significant margin. Internal data does not correlate with this decline, and marks for students in the university pathway are very high, even when they struggle to pass provincial tests. This suggests the absence of a culture of high expectations (Hattie, 2015), and perhaps a degree of teacher complacency. The failure to interrogate the disconnect between low test scores and high marks keeps university-bound students and parents happy. Moreover, it reinforces a comfortable status quo that avoids the work of changing teacher mindsets and practices. It is also possible that teacher expectations are based on student characteristics such as appearance and conduct, which is a trend in low-performing schools (Al-Fadhli and Singh, 2006). As mentioned earlier, minoritized and marginalized students tend to be streamed into non-university pathways (Parekh et al., 2021) where they attain lower marks. Their scores on standardized tests are also lower than average for the school.

This PESTE analysis and consideration of data has explored some challenges and opportunities for the CHS community, including a legacy of resistance to professional learning. In the next section, these considerations will frame four key questions to guide the work of the OIP.

### **Questions from the Problem of Practice**

The following issues drive the guiding questions. First, there are no systematic tools in place to interrogate sources of oppression at CHS. Second, there is a need to ensure that, as

principal, I select impactful leadership moves to address the adaptive challenge embedded in the PoP (Heifetz et al., 2009). Third, staying focused in the face of competing initiatives (Katz & Dack, 2013) will necessitate the strategic leveraging of existing priorities. And fourth, in a hierarchical organization that privileges certain perspectives (Borck, 2020), a key challenge will be the authentic foregrounding of student voices.

### **Uncovering, Interrogating and Removing Barriers**

First, it will be important to identify and analyze the multiple and interrelated layers of oppression at CHS. This requires the exploration of available data and is an important first step in providing context and identifying persistent challenges (Mertler, 2014). Demonstrating the impact of oppressive structures and practices will mobilize the impetus for change among staff (Heifetz et al., 2009). This must involve the personalizing of data so that educators understand the impacts of oppression on students they care about (Sharratt & Fullan, 2011). How will data be gathered and shared with educators so that they see the impact of systemic barriers on the achievement of marginalized and minoritized students at CHS, as well as their role in reinforcing these barriers?

I approach my leadership through critical theory while recognizing that educators at the school hold multiple epistemologies and are at various stages in their understanding of inequities and their potential roles in upholding them. The adaptive challenge (Heifetz et al., 2009) of the PoP will require “changes in priorities, beliefs, roles and values” (Northouse, 2019, p. 262). It is grounded in a necessary change in culture involving the fostering of collective teacher efficacy (Donohoo, 2018) in support of marginalized and minoritized students. As such, the enactment of adaptive leadership through the lens of social constructivism will involve mobilizing staff at CHS to own and address the needed change (Hargreaves, 2004). Crucially, the selected

leadership moves will involve regulating distress to create an appropriate level of productive discomfort (Heifetz et al., 2009). What intentional and anti-exclusionary leadership actions will motivate staff to disrupt patterns of oppression for marginalized and minoritized students at CHS?

### **Leveraging Existing Initiatives and Processes**

Ontario's current equity focus (OME, 2022), and the resulting de-streaming of Grade 9 courses, provide an opportunity to explore and address the systemic barriers and educator biases that led to this program shift (Parekh et al, 2021). However, the necessary focus required for permanent change in teacher practice will be challenging in the face of competing priorities (Katz & Dack, 2013) such as district-mandated professional learning projects. What existing initiatives and processes might be leveraged or appropriated at the school level (Winton & Pollock, 2013) to maintain focus on the PoP and support anti-exclusionary changes in practice?

### **Privileging Marginalized Voices**

Marginalized student voices, and those of their families, are often overlooked (James & Turner, 2017; Mayes et al., 2022). Instead, attention to student voices of privilege reinforces existing inequities (Borck, 2019). For example, the current Youth Council at CHS, which represents student interests to staff, is comprised of white, middle-class students. As such, creating a space for marginalized student voices is crucial for the development of a social justice-oriented (or anti-exclusionary) school culture (Mayes et al, 2022). This will foster belonging, which is an enabling condition for the academic achievement of marginalized and minoritized students (Vargos-Madriz & Konish, 2021; Zysberg & Schwabsky, 2021). Therefore, this OIP must disrupt the student-educator hierarchy and ensure that those on the margins are active participants in the work of change (Cheung et al., 2019). While the work of change is the

responsibility of professional teachers, how will the voices of marginalized and minoritized students be included in the change process?

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

The vision for change, a result of implementing this OIP, is of an adaptive school culture that fosters high achievement for minoritized and marginalized students. Through structured, focused opportunities for professional learning (Katz & Dack, 2013) and instructional leadership (Katz et al., 2018), this activism will see educators at CHS critically engage with their existing knowledge and commitments (Hargreaves, 2006) and interrogate their biases (Choudhury, 2021) to disrupt oppressive practices in support of social justice (Ray, 2019). Authentic student input (Mitra, 2018) will be an important data source (Safir & Dugan, 2021) and change driver, while anti-exclusionary teacher-student relationships, grounded in a growth mindset (Dweck, 2007), will lead to increased student engagement (Pianta et al., 2012).

The vision includes shared staff ownership of the equity agenda that will result in changes to teacher attitudes and actions (Pierce et al., 2018) and foster a student-centred school culture (Ismail et al., 2022). Collaborative practice will support educators through this challenging work while simultaneously increasing the school's capacity for improvement (Meyer et al., 2022). In turn, this collaboration will foster shared responsibility (O'Leary & Wood, 2019) and strong collective teacher efficacy (CTE), leading educators to believe in their shared power to engage and motivate all learners (Maddux & Gosselin, 2012), and helping students have hope in their futures (Bryce et al., 2022). The result will be increased achievement (Loughland & Ryan, 2019) for marginalized and minoritized youth. As such, the vision's anti-exclusionary orientation will align with, while reaching beyond, the instrumental goals of the neoliberal,

managerialist system (Fuller, 2012). With this in mind, the following section will explore the gap between the current context and the desired future state.

### **Gap Analysis**

The Covid 19 pandemic had a significant impact on teacher practice and instructional leadership at CHS. Teacher stress was high (Robinson et al., 2022), while provincial and regional health guidelines combined to limit pedagogical possibilities: desks were arranged in rows, professional development was in abeyance, classroom doors were closed, and frequent and unpredictable lockdowns interrupted learning. At the time of writing, there are no restrictions in place, but teaching is slow to return to pre-Covid 19 norms, and privatized practice (Harrison Berg, 2019) is common. Indeed, during a recent staff activity in which teachers were asked to brainstorm their hopes for a post-pandemic school community, the word collaboration was not mentioned. Deficit language is common, and teacher categorizations such as “special needs kids” reflect how inequity is manifested and reinforced (Bacchi, 2017; Ladson-Billings, 2021) through stereotyping. Culturally relevant and responsive pedagogy (Ladson-Billings, 2021) is lacking, while the use of test-heavy assessment strategies, the inclusion of homework in final marks, and the conflation of achievement and effort, undermine equitable grading (Feldman, 2019).

The structures required to shift CHS towards a collaborative and dialogic culture (Loughland & Ryan, 2019) are not yet in place. These include shared theories of action (Kennedy, 2016), meaningful protocols for professional conversations (Katz & Dack, 2013), consistent school-wide mechanisms for assessing progress (Markiewicz & Patrick, 2015), and meaningful collaboration with students to centre the voices of those on the margins (Safir & Dugan, 2021). In sum, the vision faces barriers. While some of these barriers result from the impact of COVID-19, others are more deeply embedded in the school culture through educator

biases, pedagogical and cultural norms, and a top-down approach (Safir and Dugan, 2021) to student voice.

### **Priorities for Change**

With the goal of closing the gap between the current organizational state and an anti-exclusionary future, three priorities must be considered.

#### ***Align the Moral Imperative with the District Imperative***

The moral imperative of this OIP is to “ignite community transformation” (Dei, 2014, p. 240) and ensure that education is done for, rather than to, marginalized and minoritized youth (Dei, 2014). The Staff at CHS must understand how multiple forms of structural oppression, such as sexism, racism, and homophobia intersect to limit opportunities (Lopez, 2017), and must work to address their own biases and oppressive practices to build an anti-exclusionary school.

However, my mandate as principal to improve poor scores on standardized tests means I am under scrutiny from the senior team to meet instrumental goals. My success as a leader is viewed from a neoliberal policy perspective (Newton & Riveros, 2017) in which test scores are conflated with school performance (Zhao, 2015). These implicit neoliberal values also impact professional norms and culture (Trujillo et al., 2021) at the school level. Many educators have internalized the constraints of New Public Management (Hall & McGinity, 2014), meaning any attempt to frame and mobilize anti-exclusionary activism will require appropriation from the dominant neoliberal discourse (Ryan, 2010). Winton and Pollock (2013) highlight the need for strategic policy appropriation, in which principals seek “support in official policy documents for pursuing goals not explicitly stated in those texts” (p. 50). As an agent of the board, I must be able to demonstrate that the work of this OIP supports district level priorities and meets student and community needs, while negotiating a policy context that may obstruct my attempts to foster

anti-exclusionary practices (Srivastava, 2010). Fostering teacher collaboration and collective teacher efficacy, two interconnected drivers for effective schools (Hattie, 2015), will create a culture that is able to navigate this tension in the best interests of students.

***Build Collective Teacher Efficacy Through Staff Coherence and Collaboration***

Collective teacher efficacy has a powerful effect on student outcomes (Hattie, 2015), students' emotional engagement, and educator commitment (Donohoo, 2018). Therefore, CTE is a key change driver for this OIP and processes to foster CTE must be a priority (Loughland & Ryan, 2019). These processes must be designed to emphasize teacher ownership of successes and failures (Ross et al., 2004), and the holding environment (Heifetz et al., 2009) must be informal enough to support this ownership (Akiba & Liang, 2016) while avoiding the risk of contrived compliance which is common in top-down professional learning (Lockton, 2019). Ownership will help foster the development of a shared stance (Strahan, 2003), staff coherence (Fullan & Quinn, 2016), and collective teacher efficacy. When educators' behaviour mitigates the impacts of systemic inequities on student achievement, the emergent culture will believe in its capacity for success (Bandura, 1986).

***Develop Routines for Sustained Action and Permanent Change***

Strong organizational routines are necessary for anti-exclusionary change (Galloway & Ishimaru, 2020), and must be deployed at the individual and school level (Stosich, 2016). These routines must reflect the iterative nature of improvement work; leverage the school as a learning organization (Katz et al, 2017); support educators in interrogating personal practices and biases (Choudhury, 2021); buffer educators from distractions to help maintain focus (Leithwood, 2013); and include teachers in decision-making to sustain motivation (Greany, 2018). The critical theory epistemology undergirding the work necessitates the enactment of leadership that challenges the

status quo while operating within in, such as selecting routines that centre youth in the school improvement discourse (Safir & Dugan, 2021). These routines must navigate the neoliberal traps of metricization (Hall & McGinity, 2015) and performativity (O’Leary & Wood, 2019), while simultaneously demonstrating to the system, through appropriate data-use, monitoring and evaluation, that the change in school culture is working to foster increased achievement.

### **Value-Added Benefits to the CHS Community**

A collaborative educator culture, one that takes an anti-exclusionary approach to teaching and learning and foregrounds student voice, will benefit all learners and their families, especially as educators gain deeper understandings of intersectional identities and barriers. For example, while the students identified as marginalized and underachieving at CHS are primarily racialized and/or poor, issues of gender, sexuality and dis/ability will also impact educator perceptions and the student experience (McCoy et al., 2022).

Moving away from privatized practice and developing CHS as a learning organization will open minds, change mindsets, and challenge the status quo (Stoll & Kools, 2017). The dismantling of othering (Pollack, 2013) will help foster important relations with parents from low-income communities (Blitz et al., 2020). Also, the development of pedagogies in which students see themselves (Khalifa et al., 2019) and the centring of student voice will increase belonging and improve school climate (Vargas-Madriz & Konishi, 2021). As a result, academic achievement will improve (Zysberg & Schwabsky, 2021).

### **Leadership Considerations**

Three levels of leadership will impact the trajectory of this OIP. At the macro level, the BSP and EFP guide the work of schools. I must work closely with my superintendent to garner system support for the agenda at CHS and demonstrate alignment with system goals. Also,



multiple provincial and district initiatives must be implemented at the school level. It will be important to navigate these in ways that do not detract from the work of the OIP, and to seek out opportunities to leverage them in support of school-level priorities.

Team approaches foster commitment (Deszca et al. 2020), and at the meso level it will be necessary to explore opportunities for shared and/or distributed leadership. Dinham (2007) and Leithwood (2016) point to the potential of department head teams in supporting instructional leadership, and this will be explored in this OIP. Professional learning communities (Katz & Dack, 2013) are another example of an existing model that is supported at the district level and could be leveraged. Also, anti-racist critical dialogue tools (Walker & Wellington, 2022) have potential for both staff and student leadership development.

Micro-level leadership will see classroom teachers creating anti-exclusionary classroom cultures and practices that centre the needs of minoritized and marginalized students. It will be crucial to scaffold support so that this level of leadership occurs collaboratively and fosters the CTE that will lead to increased student achievement.

### **Chapter 1 Conclusion**

This OIP strives to address a complex, entrenched and overwhelming societal and education system problem with focused school-level interventions. This first chapter outlines the leadership PoP and considers it in relation to my leadership positionality and lens as a principal. The need for a critical theory epistemology grounded in anti-exclusion is explored as a response to the neoliberal agenda that elides inequities and fails to address systemic barriers. Adaptive leadership is discussed as the selected approach to drive change, and this will be discussed in more detail in Chapter 2 along with proposed solutions to the PoP.

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

The second chapter of the OIP provides an overview of the leadership approach to be used and a complementary framework that will guide the change process. Organizational change readiness is explored, and three potential solutions to the PoP are outlined. Finally, a change solution is selected.

### **Leadership Approach to Change**

In Ontario, an instrumental approach to the principalship views the distinction between leadership and management as a false dichotomy (Leithwood, 2014), while the OLF's foregrounding of managerialist competencies reflects what Riveros et al. (2016) call the "global infatuation" with neoliberal leadership standards (p. 594). The resulting misalignment between the OLF and social justice-oriented leadership (Riveros et al. 2016) makes the OLF a challenging framework for anti-exclusionary change.

Therefore, this critical theory oriented OIP challenges the OLF's primacy as a "compendium of effective leadership" (Riveros et al., 2016, p. 604) and takes Kotter's (1990) view that management and leadership are separate constructs. If management produces order and consistency, leadership generates movement and change (Kotter, 1990). Indeed, leadership is a creative act (Simonet & Tett, 2012) that has the potential to foster inclusivity, participation, and social responsibility (Hughes, 2016) to drive collaborative change (Rost, 1997). It is not the instrumental enactment of predetermined competencies.

Before addressing adaptive leadership as the approach to be used in this OIP, it is important to note that, like other mainstream leadership theories, it is grounded in a functionalist epistemology based on the limited perspectives of "white, heterosexually assumed males" (Capper, 2019, p. 20). As such, it risks reinforcing positional power or constituting new

inequities (Bacchi, 2017; Pomeroy, 2020). Moreover, in a OIP focused on cultural shift, transformational leadership may appear the more obvious choice due to its focus on inspirational motivation and collective vision-building (Notgrass, 2014). However, despite its epistemological origins, adaptive leadership is best-suited to this critical theory-oriented OIP. (See Appendix B for a comparison of adaptive leadership and transformational leadership.)

### **The Anti-Exclusionary Case for Adaptive Leadership**

Adaptive leadership supports anti-exclusionary work for three key reasons. First, it challenges the conflation of leadership, power, and authority (Fine, 2016) and asserts that formal leaders are not the sole holders of power in organizations (Peck & Dickinson, 2009). Rather, adaptive leadership relies on multiple perspectives to orchestrate change (Heifetz et al., 2009), and as such makes room for marginalized voices. Second, this OIP requires educators to address systemic barriers and interrogate implicit biases (Cui, 2017; Ray, 2019), and adaptive leadership provides mechanisms to interrogate organizational and social structures (Fine, 2016) while discerning and unlearning oppressive practices within them (Lind & Ekwerike, 2022). Third, change occurs when equity-focused leaders build collective power (Ospina et al., 2012), and adaptive leadership's focus on holding environments (Heifetz et al., 2009) provides opportunities to work through the discomfort of change, build motivation, and create shared action in politically challenging situations (Campbell-Evans et al., 2014). This is crucial for building collective teacher efficacy in support of marginalized and minoritized students.

Therefore, adaptive leadership is a compelling model for addressing teacher mindsets and behaviours. It is also appealingly practical (Nelson & Squires, 2017), and there are multiple examples of its effectiveness across organizational contexts (Campbell-Evans et al., 2014). This

next section will briefly explore the theoretical foundations and desired behaviours of adaptive leadership, and from there the model will be considered in the specific context of CHS.

### **Theoretical Foundations of Adaptive Leadership**

Adaptive leadership is grounded in “efforts to understand *in practical ways* [emphasis added] the relationship among leadership, adaptation, systems, and change” (Heifetz et al., 2009, p. 13) and its appeal lies in its actionable nature. Although the model’s research foundation is grounded in a loose interpretation of evolutionary biology (see Heifetz et al., 2009, pp. 13-15), various studies demonstrate its effectiveness in practice (for example, see Adams et al., 2013). Benzie et al. (2017) demonstrate the model’s value in addressing a “wicked problem which eludes a linear formulation and is open to multiple framings” (p. 227). The work of this OIP is a “wicked problem” because it is deeply rooted, multifaceted and resistant to resolution (Zhao et al., 2019). The key behaviours of adaptive leadership provide a roadmap for addressing its complexity.

### **Key Behaviours of Adaptive Leadership**

Heifetz et al. (2009) propose six leadership behaviours that support the work of change. The first, getting on the balcony, involves removing oneself from the situation being addressed and gaining “a clearer view of reality” (Northouse, 2019, p. 262). More broadly, adaptive leadership requires frequent movement between perspectives to reduce the risk of important situational factors being ignored. Second, identifying adaptive challenges involves careful diagnosis of problems to ensure that the correct issues are addressed. Third, regulating distress involves maintaining productive disequilibrium to ensure that there is sufficient discomfort to address the need to change – but not too much. In terms of fostering accountability, this means encouraging teachers to be “responsible within the group or system (internal accountability), and

to respond to and engage with system priorities and performance therein (external accountability)” (Fullan & Quinn, 2016, p. 13). Fourth, maintaining disciplined attention requires adaptive leaders to stay focused on the change vision in the face of competing priorities. Fifth, giving the work back to the people involves seeking ways to ensure others adopt and enact the change vision. And sixth, protecting leadership voices from below is especially important in an OIP that interrogates bias: leaders must examine their own reactions, and protect those who raise difficult questions and challenge thinking (Odongo, 2020). With these behaviours in mind, the application of adaptive leadership within the school context will now be explored.

### **Adaptive Leadership for CHS**

This section will address three necessary adaptive leadership tasks in the context of CHS: diagnosing the issues to be addressed, selecting a change process, and creating a holding environment in which the work of change will occur.

#### ***Diagnosis***

At CHS, multiple symptoms of systemic inequity are intertwined with issues of school culture, making it important to identify what can be strategically addressed at the school level. This involves taking a balcony view to assess the political landscape, the tenacity of the status quo, and the interplay of personal and systemic realities while determining how these factors influence the adaptive challenge to be addressed. The model proposes that diagnosis does not occur in a vacuum, but while the messy work of the system (Sugrue, 2000) is underway. Adaptive leadership recognizes this complexity, as well as the fact that self-diagnosis is as important as system diagnosis (Heifetz et al., 2009). This is especially important in an OIP that explores educator biases and leadership complicity in reinforcing inequities.

The adaptive challenge of this OIP aligns with the archetype known as the “Gap Between Espoused Values and Behavior” (Heifetz et al., 2009, p. 78). While the BIP, EFP, and recent school improvement plans speak of supporting disenfranchised learners, this is not borne out in educator practice or student achievement at CHS. Rewiring the school culture (Grunert & Whitaker, 2015) will require iterative and incremental change (Heifetz et al., 2009), and adaptive leadership provides the tools to identify the most appropriate options, as well as the strategies needed to stay focused on “bold aspirations among challenging realities” (Heifetz et al., 2009, p. 2).

### ***Selecting a Change Process***

A key aspect of adaptive leadership is carefully weighing change options (Heifetz et al., 2009) while recognizing the potential inaccuracy of diagnoses (Campbell-Evans et al., 2014). It is important to choose strategies that allow for alternative solutions that may arise during the change process (Campbell-Evans et al., 2014). Also, adaptive leadership considers potential unintended consequences at each stage of decision-making (Heifetz et al., 2009). For example, change that overwhelms teachers will harm their practice (Shen, 2008). Crucially, the adaptive challenge of this OIP involves the kind of learning that leads to social transformation (Flood & Romm, 1996). It requires educators at CHS to interrogate the implicit values that underpin their practice and explore the factors that lead to inequitable student achievement. Therefore, the change process selected must be tight enough to ensure sustained focus, but loose enough to flex (Trask & Cowie, 2022). Clear goals, structures and strategies are needed to frame the work (tight), but time and space for reflection and iterative change (loose) will ensure that unanticipated opportunities are leveraged, and that staff are provided with varied, personalized

opportunities to engage in the work of change (CAST, 2023). According to the tenets of adaptive leadership, this work will occur in a carefully created holding environment (Heifetz et al., 2009).

### ***Creating a Holding Environment***

The holding environment is a psychological space, one that is safe enough to allow for experimentation, but uncomfortable enough to ensure problems are addressed (Lead3, 2019). Change requires disequilibrium (Heifetz et al., 2009) and possibly fear and resentment (Kegan & Lahey, 2009). Crucially, it involves the experience of loss (Heifetz et al., 2009). For example, a move towards collaborative pedagogy at CHS will result in lost autonomy for educators who embrace privatized practice and in doing so avoid the vulnerability inherent in shared work (Donohoo, 2017; Fiarman, 2015). As such, the holding environment is a space in which the ripeness for change (Heifetz et al., 2009) can be assessed, and motivation cultivated so that educators begin to own the change process, both individually and collectively. The resulting sense of propulsion puts leadership into the hands of many (Heifetz et al., 2009) and creates the conditions (Fullan & Hargreaves, 1992) for collective teacher efficacy and anti-exclusionary practice.

With adaptive leadership established as the approach to be used for addressing this PoP, it is now necessary to determine a framework to guide the change process.

### **A Framework for Leading Change**

Change initiatives often face significant resistance (Nadler & Tusham, 1989; Lewis, 2019) and rarely succeed (Basford & Shaninger, 2016; Deszca et al., 2020). Anti-exclusionary change is hard to achieve because “ideological change is not a rational process” (Basile & Azvedo, 2022, p. 1087) and involves interrogating personal complicity in marginalization (Kendi, 2019). Therefore, it is vital that a strong yet flexible change framework is in place to

challenge resistance (Kegan & Lahey, 2009) while building and maintaining momentum (Basile & Azvedo, 2022).

This section proposes the Change Path Model (Deszca et al., 2020) as a suitable framework for the work of this OIP, and one that aligns with adaptive leadership. Also, Nadler and Tushman's (1989) Organizational Congruence Model is explored as a complimentary tool to support organizational analysis and change. The section concludes with an overview of how the Change Path Model will be used in conjunction with the Organizational Congruence Model to frame the solutions that conclude this chapter.

### **The Change Path Model and Adaptive Leadership**

Like the adaptive leadership approach, the Change Path Model views change as a “an intensely human activity, involving careful consideration of individual values, beliefs and perceptions” (Deszca, 2019, p. 5). Moreover, the model relies upon the management of organizational (dis)equilibrium, in alignment with adaptive leadership.

The Change Path Model offers a series of interconnected steps useful for determining what will occur in the holding environment. First, the awakening stage involves the development and communication of a change vision. Second, mobilization requires the assessment of organizational dynamics and the identification and leveraging of change agents. Third, acceleration involves continued momentum along with increased stakeholder engagement and empowerment. And fourth, institutionalization focuses on monitoring and stabilizing the renewed organization. These steps allow for iterative change while providing a focus on forward momentum.



### **The Change Path Model: A Strategic and Pragmatic Choice**

The use of the Change Path Model in this OIP is both a strategic and pragmatic choice. It is strategic because the model is designed to address complex change and is therefore well-placed to deal with “wicked problems” such as the cultural shift required at CHS.

The epistemology undergirding this OIP “pivots upon relationships of power” (Capper, 2019, p. 69), and the Change Path Model, while grounded in the business sector, focuses on the impacts of power and culture within organizations (Deszca et al., 2020). Therefore, the Change Path Model allows for a critical theory lens when mobilizing change. It also reaches beyond single loop learning (in which problems are diagnosed and fixed) and supports deeper double loop learning that engages educators in exploring the influences on decision-making (Tamarack Institute, n.d.) in a tightly structured organizational context.

Second, the model is a pragmatic choice because it builds upon key ideas from classic frameworks such as Kotter’s (1995) Eight-Stage Change Process and Duck’s (2001) Five Stage Change Curve. As such, it represents a contemporary synthesis of canonical change frameworks while reflecting Deszca et al.’s (2020) more recent consultancy work in the field. The model’s focus on change at the organizational level (rather than systemic or individual) makes it ideal for addressing a school-focused PoP.

### **Limitations of the Change Path Model**

A key caveat when using the Change Path Model is the lack of research concerning its effectiveness. However, the Organizational Congruence Model (Nadler & Tushman, 1989), which Deszca et al. (2020) emphasize as a complementary approach to the Change Path Model, is supported in various studies (see Waldersee & Eagleson, 2002; Saton and Gilson, 2015). This

model is briefly discussed in the following section, and its interconnectedness with the Change Path Model is shown Appendix C.

### **Nadler and Tushman's (1989) Congruence Model: An Interconnected Approach**

Nadler and Tushman's (1989) Organizational Congruence Model explains how organizational inputs (environment, resources, and history/culture) interact with the transformation process (informal/formal organizational factors, people and work) to deliver change (outputs). Effective change depends on congruence between these interdependent variables (Nadler & Tushman, 1989).

The adaptive leadership behaviour of taking a balcony view (Heifetz et al, 2009) provides an opportunity to understand the inputs that shape the organization and its readiness for change (Nadler & Tushman, 1989). These inputs are managed in the holding environment (Heifetz et al, 2009) where the transformation process takes place (Nadler & Tushman, 1989). The Change Path Model's four interconnected phases – awakening, mobilization, acceleration and institutionalization – provide the forward momentum for change and are discussed in more detail below.

### **Applying the Model at CHS**

This section explores how the model applies to the current context at CHS. Crucially, the model allows for ongoing revision of the work of change, reflecting adaptive leadership's tenet that understandings and strategies may shift as learning occurs (Heifetz et al., 2009).

#### ***Inputs***

The culture, history and PESTE analysis relevant to this OIP are discussed in Chapter 1. They will be revisited again in this chapter when organizational change readiness is explored. Taking a balcony view of these inputs will provide sufficient distance from the daily work of the

school (Heifetz et al., 2009) to more clearly observe how current mindsets and practices disadvantage minoritized and marginalized students.

### ***The Work of the Holding Environment***

The holding environment is a “containing vessel in which work can be done” (Heifetz et al., 2009, p. 155), created and managed to support change. As such, the holding environment is the space in which the four stages of Change Path Model occur (see Appendix C).

**Awakening.** In the awakening stage of the Change Path Model, leaders develop and disseminate the vision for change (Deszca et al., 2020). In the case of this OIP, awakening involves foregrounding the crisis of inequity at CHS and sharing the vision of an anti-exclusionary culture. This vision must be communicated with key stakeholders (Lewis, 2018): staff, students and families. From a district perspective, the vision will be seen as supporting the goal of raising scores on standardized tests.

Data collection and analysis is integral to all steps of the Change Path Model. However, it will be important to provide evidence for the needed change during the awakening stage. The available achievement data, while limited, is powerful but needs augmenting. As such, an equity audit is an appropriate symbolic move and a way to gather key data from community members. Designing the audit with staff and stakeholders could help build momentum, and Fisher and Frey’s (2022) equity taxonomy provides a useful starting point. The taxonomy considers the physical integration of students, instructional excellence, opportunities to learn, social-emotional engagement, and student empowerment.

**Mobilization.** The Change Path Model’s mobilization stage proposes the creation of teams and coalitions and aligns with adaptive leadership’s focus on motivation. The forming of an equity-focused data team is an example of how teachers could be involved in leadership

development and sow the seeds of data-driven decision-making. Mobilization considers the learning needs and styles of followers while leveraging existing change agents, and addresses both formal and informal aspects of the organization. At the mobilization stage, it will be important to manage the holding environment where the challenging work of addressing educator biases will be done (Choudhury, 2021). Also, Kellerman's (2009) followership typology will be helpful in determining the support educators require. It will also be important to leverage staff personality, skills and related assets for the benefit of the change agenda (Deszca et al., 2020). The broader school culture must also be considered (Gruenert & Whitaker, 2015).

Further, mobilization requires structures and protocols. These are crucial tools for supporting the intentional interruption of established practices through the challenging of biases and assumptions (Katz & Dack, 2013; Katz et al., 2018), and for developing collective teacher efficacy (Donohoo, 2017). As such, the proposed solutions to the PoP must include mechanisms to support implementation (Barber et al., 2011).

**Acceleration.** In the Change Path Model's acceleration stage, momentum-building occurs in the context of iterative action planning and implementation. For example, Crowfoot and Prasad (2017) use the example of the professional learning communities (PLCs) to show how teams should continually collect data, execute plans, study what was learned, and act on their findings. At this stage, the leadership task is to maintain the holding environment (Heifetz et al., 2009), recognizing the complexity of multiple educators working individually and collectively in support of a shared goal.

**Institutionalization.** The Change Path Model's final stage is that of institutionalization, monitoring and adjustment, recognizing that multiple initiatives often happen simultaneously (Katz et al., 2018). At this stage, the organization is continually reflecting and adapting through

routinized inquiry (Datnow & Park, 2014). Regardless of the chosen solution, determining and tracking community attitudes towards anti-exclusion will necessitate surveys, conversations, and observations: How do teachers speak about marginalized students? Is there still evidence of deficit thinking and language (Garcia & Guerra, 2004)? Can educators speak to systemic inequities and the impacts on their practice? Administrator-led classroom observations and interviews will be needed, and existing structures that can be used as part of the process include school improvement planning routines, the teacher performance appraisal process, and parent meetings. Also, individual student profiles can be used to personalize data (Sharratt & Fullan, 2012). Evaluating change is complex, and there are risks of oversimplification (Martino & Rezai-Rashti, 2013). Moreover, the quest for desired outcomes (or outputs) may inadvertently ignore the unintended consequences of change. This highlights the need to monitor the wide-ranging impacts of implementation rather than focusing on narrow targets (Birch & Jacob, 2019). First, however, it is necessary to assess the current state of the organization. This will help determine the solutions to be used to address the PoP.

### **Organizational Change Readiness**

Before addressing solutions to the PoP, it is important to evaluate change readiness at CHS. “Readiness for change is a multi-dimensional, multi-level, multifaceted construct” (Wang et al., 2020, p. 2) and variables to consider include the content of the proposed change, the context, the process to be used and the evaluation criteria (Amenakis & Bedeian, 1999). Addressing these inputs (Nadler & Tushman, 1989) in the holding environment will support the change agenda (Heifetz et al., 2009) while recognizing that change readiness is fluid. As Musselwhite and Plouffe (2010) point out, “change readiness is the ability to continuously

initiate and respond to change in ways that create advantage, minimize risk, and sustain performance” (n.p.).

To some extent, the solution chosen to address the PoP will determine which change-readiness variables should be prioritized. For example, solutions that include distributed leadership must address micro-politics within the team (Berkovich, 2020), and policy-oriented change must account for a complex typology of actors (Ball et al., 2011). In an OIP that addresses disadvantage, it is also important to note that change readiness analysis may inadvertently reinforce inequities through the oversimplification of cause and effect (Martino & Rezai-Rashti, 2013; Pomeroy, 2020). Also, because educator vulnerability is necessary to interrogate biases, trust in the change-leader must be explored due to its correlation with educator belief in the value of change (Zayim & Kondakci, 2015).

Chapter 1’s PESTE analysis (a key input of the Organizational Congruence Model) describes CHS as a growing school community coming to terms with the impacts of COVID-19. Privatized practice is the norm, and low expectations for marginalized and minoritized students are reflected in achievement data. From the district perspective, the school is in a crisis due to underperformance on standardized tests. Also, the most-recent district-level school evaluation from 2015 aligns closely with the current reality, suggesting little growth or change in the intervening years. The provincial and district level equity agenda is grounded in neoliberalism (see Shewchuk & Cooper, 2018).

With this context in mind, change readiness will now be explored from two perspectives. First, the interaction of individual (educator) and organizational (school level) change readiness will be considered using Wang et al.’s (2020) research-informed conceptualization of school-based system readiness. Second, Gruenert & Whitaker’s (2015) School Culture Typology will

explore how shared professional attitudes shape organizational culture. School culture entails the interaction of educators' shared beliefs, values, and assumptions (Blodget, 2022), and therefore has a significant impact on change readiness. Change agendas typically fail when cultural influences are not acknowledged (Harris & Jones, 2017), making it important to understand cultural dynamics. It is important to note that the School Culture Typology does not directly address student marginalization or educator attitudes towards it. As such, it will be important to explore how CHS's culture reinforces bias and prejudice (see Gillborn, 2006; Sondel et al., 2022) while influencing change readiness.

### **Applying the Conceptualization of System Readiness for Change (Wang et al., 2020)**

Wang et al.'s (2020) framework includes four constructs that address the individual and organizational levels: efficacy, valence, commitment, and leadership. These will be considered in the context of change readiness at CHS.

#### ***Change Efficacy***

First, change efficacy is connected to collective teacher efficacy (CTE) and refers to educator beliefs that, together, they have the capacity to plan for and enact change (Wang et al., 2020). At CHS, privatized practice is a barrier to shared change efficacy. Moreover, some staff report that student failure is the result of poverty and family dynamics, and in student success meetings teachers will often blame students for their lack of achievement. This reflects Warren's (2002) finding that 70% of educators hold negative beliefs about certain students, especially those who are racialized and/or live in poverty. If teacher attitudes towards students are self-fulfilling prophecies (Thomson et al., 2004), then "the examination of teacher attributions of student success and failure is highly significant for effective implementation of inclusive practice" (Woodcock & Faith, 2021, p. 221). While there are certainly equity champions at CHS,

the regular expression of deficit thinking among teachers suggests that change efficacy is not yet in place. In terms of change readiness, it will be important to identify and leverage teachers who demonstrate higher self-efficacy, and who view student performance as fluid rather than fixed. This cohort is more likely to support and enact change (Thoonen et al., 2011).

### *Change Valence*

Change valence refers to the perceptions of change recipients at the individual and organizational levels. In the context of this OIP, valence addresses the perception that the planned change will benefit the school. Heifetz et al. (2009) note that, in general, change equates to loss and will be resisted. Moreover, people will avoid change if their self-interest (such as independent practice) is threatened (Armenakis & Harris, 2002; Kegan & Lahey, 2009). At this stage, the planned change solution has not been introduced, but the school visioning team has committed to an equity-focused future (without yet determining what this will look like). Also, equity is increasingly foregrounded at the district level, as described in Chapter 1. Therefore, CHS is at the awakening stage of the Change Path Model (Deszca et al., 2020). Change valence is low and must be continually reinforced through carefully crafted messaging that challenges the status quo and foregrounds the deficits in the current system (Klein, 1996). This will highlight the gap between espoused values and behaviour that frames the adaptive challenge of the PoP (Heifetz et al., 2009). Crucially, communication must be strategic, recognizing the positive impact of effective messaging on variables such as commitment and performance (Hussein, 2013). It must carefully balance the acknowledgment of educator complicity in inequity (see Cui, 2017; Sondel et al., 2022) without ascribing blame in ways that cause defensiveness and disengagement.



### ***Commitment***

If change valence is not yet in place, the lack of current commitment to the change process is a given. However, there is significant educator commitment to the school community that can be leveraged through leadership support (Ryan & Deci, 2000) during the disequilibrium of change (Heifetz et al., 2009). At the individual level, educator mindsets vary. Using Kellerman's (2008) Followership Typology, educators at CHS are predominantly "bystanders" (who avoid engagement with initiatives) and "participants" (who are partially engaged and sometimes willing to take a stand in favour of, or against, change agendas). Persuading participants to support the work of the OIP is an important aspect of change readiness (Kellerman, 2008). Also, a small cohort of "activists" (change agents) consists primarily of department heads and is willing to challenge current practices to better support students. These influential enthusiasts (Ball et al., 2011) must be central to the change agenda.

### ***Leadership***

Adaptive leadership fosters change readiness and follower motivation at the individual and organizational levels. As principal, I feel ready to lead change – indeed, change is imperative – and I have the support of my vice-principal. Therefore, my role will be to use adaptive strategies to assess and build trust in support of the OIP, recognizing that trust not only creates change readiness, but "reciprocally generates conditions for realizing transformational goals" (Edwards-Groves & Grootenboer, 2021, p. 260). Also, leadership provides cultural support (Wang et al., 2020). It is therefore necessary to briefly explore the staff culture at CHS and its readiness for change.

### **Applying Gruenert & Whitaker's (2015) School Culture Typology**

The School Culture Typology (Gruenert & Whitaker, 2015) is an assessment rubric that considers factors such as attitudes to student achievement, collegial awareness, shared values, and communication (see Appendix D). It is helpful because of its (unacknowledged) alignment with the Organizational Congruence Model and its consideration of the work, people, and in/formal organization that interact throughout the change process (Nadler & Tushman, 1989). I completed the rubric with my vice-principal, recognizing that our biases as formal leaders influence our responses (Gehlbach & Vriesema, 2018). Nonetheless, the findings reflect the balcony view (Heifetz et al., 2009) and the results align with observations contained in the district assessment report from 2015. Therefore, they have value in terms of providing additional context for change readiness.

The completed typology suggests that CHS is an evenly matched combination of “balkanized” and “comfortable collaborative” cultures. In balkanized cultures, competition between small teacher cliques creates division, and strong cliques often undermine principal decision-making through their actions (Gruenert & Whitaker, 2015). Meanwhile, comfortable-collaborative cultures reflect a “culture of nice” (Katz & Dack, 2013) in which teachers avoid meaningful pedagogical conversations that might be seen to challenge peers’ practice. Combining the two types reveals a culture in which educators are judgemental within cliques while superficially collegial. Educator opinions about colleagues, while discussed in small groups, will not be shared with those about whom the opinions are held. In terms of change readiness, balkanized cultures will sabotage agendas they dislike, and comfortable-collaborative cultures tend to avoid challenges (Gruenert & Whitaker, 2015). When the change agenda is

grounded in discomfort and disequilibrium, as the work of addressing inequitable mindsets and practices most certainly is, there is no doubt it will be perceived as a threat.

### **A Summary of Organizational Change Readiness at CHS**

While the extant equity agenda speaks to emerging readiness, the balkanized/comfortable-collaborative culture feeds into this agenda as a weakening factor. Similarly, teachers labeled as participants may undermine activists while being simultaneously susceptible to their influence. As such, the variables are not static but interrelated and fluid (Musselwhite and Plouffe, 2010). Nonetheless, at this stage the school demonstrates a lack of readiness in key areas at the individual and organizational levels, and this must be factored into the choice of solutions to address the PoP. Appendix E shows a visual representation of change readiness at CHS.

### **Change Drivers to Foster Coherence**

The work of this OIP must be coherence-seeking. Strategies to address identified needs, such as exploring deficit thinking and building collaboration, should align in support of the overarching change vision. Fullan and Quinn (2016) argue that coherence can only be achieved “through purposeful action and interaction, working on capacity, clarity, precision of practice, transparency, monitoring of progress, and continuous correction” (p. 2), and they propose four change drivers that comprise the Coherence Framework (Fullan & Quinn, 2016): focusing direction, cultivating collaborative cultures, deepening learning, and securing accountability. For the purposes of this OIP, focusing direction requires adaptive leadership to build support for the change vision; cultivating collaborative cultures entails the fostering of professional collaboration to challenge the existing staff culture; deepening learning involves building teacher capacity to support anti-exclusionary practice; and securing accountability requires the balancing

of internal and external accountability through the fostering of shared responsibility and the use of effective monitoring and evaluation strategies. These change drivers are essential considerations in the Change Implementation Plan (CIP), Strategic Communications Plan (SCP) and monitoring and evaluation strategies discussed in Chapter 3. Moreover, the framework's dynamism (Fullan & Quinn, 2016) is well-suited to the "wickedness" of the PoP's adaptive challenge.

### **Ethical Considerations**

Leadership ethics have a significant impact on follower action (Walumbwa et al., 2012), and while defining ethics in practice is both challenging (Lawton and Pa'ez, 2014) and beyond the scope of the OIP, four ethical standards (care, respect, integrity and trust) govern Ontario educators (Ontario College of Teachers, 2021) and the work of this OIP. Care speaks to empathy in practice, which is an important change lever (Hartman, 2017) for exploring implicit biases and systemic barriers. Respect aligns with anti-exclusionary practice, which is at the core of this OIP, and trust speaks to relationship-building with multiple stakeholders. For example, it will be important to consider equitable, invitational and culturally appropriate ways to gather input and feedback from students during the change process (Hayhoe et al., 2017). Lastly, integrity focuses on continual reflection in support of moral action and aligns with adaptive leadership's focus on iterative diagnoses and solutions. It is also worth noting that, as a leader, my integrity rests on ensuring accountability (Leithwood, 2013) so that teachers meet the challenge of the PoP and have high expectations for all students (Hattie, 2015).

A practical ethical consideration involves data use. Although personalized data about students engages teachers (Sharratt & Fullan, 2012), confidentiality requirements in Ontario limit the storage and sharing of information (Municipal Freedom of Information and Protection of

Privacy Act, 1991). In a medium-sized school in which students are well-known, anonymization will be difficult to uphold. As such, meaningful information that connects inequity to achievement must be carefully managed. Meanwhile, the sharing of narratives must be done with permission to avoid appropriation.

Lastly, while the work of change is the responsibility of educators who must shift their mindsets and practices, it is vital that community voices are heard in ways that genuinely uphold an ethic of care; Finefter-Rosenbluh (2022) warns that voice initiatives intended to support students often become the “power apparatuses of teacher surveillance” (p. 842), and this must be avoided. Mechanisms for the ethical integration of student voice are discussed in Appendix F and Appendix G.

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

With the above ethical considerations in mind, this section will explore three potential solutions to the PoP. (Timelines for the chosen solution will be addressed in Chapter 3.)

#### **Solution 1: Collaborative Teacher Inquiry through Professional Learning Communities**

Collaborative teacher inquiry (CTI) is “a systematic approach for educators to identify professional dilemmas and determine resolutions through shared inquiry, problem solving, and reflection” (Donohoo, 2017, p. 60). It is an effective model (Fullan & Quinn, 2016) that uses inductive, deductive, and abductive reasoning for meaningful analysis and combines theory with practice (OME, 2010). Moreover, CTI can be scaffolded in a variety of ways, including action research partnerships, school networks, and professional learning communities (PLCs) (OME, 2010). This proposed solution focusses on PLCs as the mechanism for supporting CTI. Many structural protocols exist to support PLCs (see, for example, Katz & Dack, 2013), and there is some pre-pandemic experience of using PLCs in UDSB, albeit in a limited way.

A professional learning community (PLC) is “a group of teachers [that] critically shares and interrogates its practice in an ongoing, reflective and collaborative way, focusing on professional growth and with an orientation on learning” (De Neve and Devos, 2016, p.264). Teachers share and question their practice from an inclusive yet critical perspective (De Neve, Devos, & Tuytens, 2015) with the goal of improving student achievement (Voelkel, 2022).

PLCs should include diverse voices to foster meaningful dialogue (Courtney et al., 2017), and avoid comfortable-collaborative norms (Gruenert & Whitaker, 2015). While there is no ideal size or format for a PLC, Donohoo (2017) notes that too many or too few members reduce efficacy. For the purposes of this proposed solution, the assumption is that multiple PLC teams of between 4 and 7 members will be formed.

This proposed solution uses Donohoo’s (2017) Collaborative Inquiry Four-Stage Model (CIFSM). In the first stage (“Plan”), teachers select a focus, develop an inquiry question, and devise a theory of action that connects educator practice to student learning (Donohoo, 2017). The latter, abductive step is crucial for a PoP that addresses the impact of educator mindsets and practices on disadvantaged students because educators must make connections between their work and its effects (Parekh et al., 2021). In the second stage (“Act”), teachers implement changes and collect evidence of the impact. In the third stage (“Observe”), they examine data to identify patterns and themes, unpack their assumptions, and may revise the theory of action. Lastly, in the fourth stage (“Assess”) teachers formulate conclusions, debrief and celebrate their efforts. They then repeat the cycle.

### ***Required Resources and Supports for Solution 1***

Educators require significant time to develop the skills required for PLCs (Lator, 2006). However, the alignment with district priorities means that experienced board-level staff would be available to provide support during the learning phase. Also, PLCs can operate with various degrees of sophistication (Courtney et al., 2017), meaning that Fullan's (2009) "Ready, Fire, Aim" approach – in which the work begins, and strategies are finessed along the way – may be appropriate. The UDSB teacher collective agreement requires that teachers must be provided with release time to participate in non-voluntary professional learning, so supply teacher costs must be factored into the budget and may limit how many staff are able to participate. Ideally, the school culture would shift to the extent that teachers value PLCs enough to use their own time, but pressure from the union in the current climate may limit this. Lastly, PLCs require strong structures to be effective (LeClerc et al., 2012). Luckily, there are many existing protocols that could be used or adapted (see, for example, Donohoo, 2017; Katz & Dack, 2013; Katz et al., 2018). Additional support required at all stages includes encouragement and reinforcement from the principal, vice-principal and department heads, ongoing follow-up, and mechanisms to involve teachers in decision-making (LeClerc et al., 2012).

### **Solution 2: Expert Coaching from External Consultants**

Coaching provides teachers with access to expertise that is geared to their needs and aimed at improving practice (Coburn & Russell, 2008; Rhodes, 2012). Increasingly, it is seen as a valuable strategy for addressing equity-focused school improvement (Dean et al., 2021), and it can help educators interrogate the intersections of belief, behaviour, and ways of being (Aguilar, 2020). While peer coaching is an effective option in some contexts (see So et al., 2021), the current lack of expertise at CHS means Solution 2 proposes the hiring of external

consultants. These could be individual experts, consulting companies, or staff from other school boards. For example, some larger Ontario school boards have in-house equity leads available to support other districts. For the White, middle-class staff of CHS, learning from and with someone from a marginalized or minoritized community would help foster understanding and empathy (Choudhury, 2021) and undermine the trope of the single story that essentializes difference (Adichie, 2018).

Following an interview process, the selected coach/consultant would meet with the school administrative team to discuss the PoP and school context. From there, s/he would co-create a plan with the school leaders that aligned with the Change Path Model and involved all teachers. Relationships would be built over time, and the consultant's external lens would assist with maintaining a balcony view (Heifetz et al., 2009) of the school and its progress. There would be opportunities to meet virtually and in-person on professional development days, at staff meetings, and during the instructional day (with supply coverage for teachers). Buffone (2022) notes that the work of equity consultants can be both proximal, including supporting teachers with data use and CRRP, and distal, including reviewing existing teacher guides and course outlines to ensure diverse voices (Buffone, 2022). This allows for a holistic approach. Also, plans can be adjusted within the holding environment to maintain momentum and respond to iterative diagnoses of issues (Heifetz et al., 2009).

### ***Required Resources and Supports for Solution 2***

Procuring external consultants requires a significant financial commitment. CHS has a reserve fund, but costs may not be sustainable. As mentioned, supply teachers would also be necessary to provide release time for staff to participate in the work.



### **Solution 3: Fostering Department Head Equity Leadership**

CHS's department heads support teachers in their subject areas, assist with scheduling, and purchase resources. They are appointed for 3-year terms through an interview process that does not consider seniority, thus providing school leaders with atypical hiring autonomy. The lack of a formal job description means there is some ambiguity to the role, although the teachers' union acknowledges that department heads should "foster exemplary teaching and a collegial, collaborative work environment within a department" (ALOECTA, 2012). Unfortunately, despite significant evidence of department head influence on student-centered practice, culturally responsive curriculum, pedagogy (Highfield, 2012), and student achievement (Dinham, 2007; Leithwood, 2016), the potential of the role is underutilized across systems (Seashore & Walstron, 2012).

As such, Solution 3 proposes equity-focused capacity building so that CHS's department heads can become anti-exclusionary instructional leaders. They will learn with and from colleagues (OECD 2014), as well as through more formal mechanisms. Later, distributed leadership (see Mayrowetz, 2008) will be used to influence and build capacity among department members (Gronn, 2002). Department heads will work at the distal and proximal levels to improve student outcomes.

Dinham (2007) identifies several areas in which effective department heads operate to support student success. These include relationship-building, advocacy, external relations, department planning, and organization. Department heads also collaborate, work as team-builders, and set expectations for a culture of success (Dinham, 2007). These areas align with the OLF and therefore with district priorities. They also recognize the multifaceted nature of leadership, which Leithwood (2013) describes as "a bundle of activities exercised by a person or

group of persons which reflect the particular circumstances in which they find themselves” (p. 5). Therefore, Solution 3 involves PoP-focused department head goalsetting and team-leadership, in consultation with the principal/vice-principal team, based on the analysis of equity data. The awakening stage would include the exploration of the department head role, the facilitated interrogation of department heads’ implicit biases (Aguilar, 2020), and leadership capacity-building to support department head influence (Leithwood, 2016). Goals would be addressed with scaffolded support such as professional learning opportunities (conferences, coaching or mentoring sessions, professional reading, etc.) and regular team meetings. At the mobilization and acceleration stages, department heads would work to diagnose problems, motivate staff, and foster CTE within their subject area teams, while working together to de-privatize practice and shift the school culture. Lastly, during the institutionalization stage, department heads would be accountable for anti-exclusionary cultures in their teams. It should be noted that the current team of department heads is committed to school improvement, but that leaving the position while remaining a teacher at CHS is an option for anyone who does not wish to take an equity-focused leadership role.

### ***Required Resources and Supports for Solution 3***

The department head team is already established, as are some norms related to the role. For example, there are regular team meetings and department heads are expected to meet with their subject groups multiple times during the school year. The department head responsibility allowance negates opposition to meeting outside of the school day or during lunch, which takes away supply teacher costs. Also, heads typically hold department meetings at lunch and provide food – this, too, is an unchallenged norm. The relatively small size of the department head team (7 staff) means that supply costs would be manageable if, for example, a retreat to focus on the

awakening stage of Solution 2 is planned. The small size of the team also means that the reserve fund, plus the school's professional development budget, would provide ample flexibility to support necessary professional learning.

### **An Evaluation of the Proposed Solutions**

The three proposed solutions will now be evaluated, and a preferred solution selected.

#### **Evaluating Solution 1: Professional Learning Communities**

PLCs are effective tools for supporting the interrogation of established practices through the challenging of biases and assumptions (Katz & Dack, 2013), and for developing collective teacher efficacy (Donohoo, 2017). They are also a well-tested mechanism (Courtney et al., 2017) for systematizing dialogue to maintain focus (Fichtman Dana et al., 2011). As such, they are a potential fit for addressing the PoP. The challenge at CHS is that privatized practice is entrenched, and engagement with mandatory PLCs may result in contrived compliance (Metwally, 2019). Moreover, balancing the need to provide support while allowing autonomy for the work of the PLC (Courtney et al., 2017) may make it difficult to manage the holding environment: the questions addressed in PLCs may be misaligned with the PoP; dialogue may default to the comfortable-collaborative school norm; and the work of equity may become performative (McCullough & Erasmus, 2022). Moreover, the significant demographic divide between teachers and students in Ontario (Shewchuk & Cooper, 2018) means that without prior learning about systemic barriers and the interrogation of biases, the work of PLCs may elide the inequities they are intended to address. The key concern, then, is that PLCs may not provide the necessary framework for shifting educator attitudes. In other words, the inputs (Nadler & Tushman, 1989) may be misaligned with the transformation process. As such, this solution will not be selected.

### **Evaluating Solution 2: Expert Coaching from External Consultants**

Consultants bringing marginalized voices to the table could mobilize staff to explore implicit biases, and programmatic communication could help maintain motivation in the holding environment. Shared staff experience grounded in the exploration of biases could generate meaningful professional conversations to support CTE and foster de-privatized practice over time (see, for example, Stephens et al., 2022). However, the variety of follower types (Kellerman, 2008) and learner styles (CAST, 2023) means it would be challenging to ensure that all teachers benefit. Further, making the work obligatory for staff would negatively impact engagement given that teacher resistance to external consultants is often high (Dean et al., 2021). Lastly, ensuring quality consulting would be an additional challenge because many consultants fail to orient themselves to the specific needs of schools (Dean et al, 2021). This significant risk, along with the challenge of reaching all learners, rules out this solution.

### **Evaluating Solution 3: Fostering Department Head Equity Leadership**

The preferred solution, then, leverages an existing school structure. Department heads at CHS hold significant professional capital (Hargreaves & Fullan, 2012). More broadly, they have “the unequalled opportunity of direct, daily contact with teachers and students” (Weller, 2001, p. 74); a significant influence on teacher participation in professional learning (Leithwood, 2016); and a crucial role in leading high performing schools (Dinham, 2007). Importantly, department head leadership avoids the risk of top-down initiatives that would likely be met with disdain (Thacker, 2017).

Through the lens of adaptive leadership, department heads will work – independently and together – within the holding environment to foster trust (Strahan, 2003) and staff motivation. Also, they will help maintain an appropriate level of disequilibrium through the balancing of

harmony and goal attainment (Sweetland & Hoy, 2000) within their departments. Cogens can be used on an ongoing, iterative basis to support the work and ensure student input (see Appendix G). Members of the department head team are at various stages of learning and will require different entry points into anti-exclusionary work, but their commitment is in place. Change will occur when they build collective power (Ospina et al., 2012).

However, departments as cultural units can create significant organizational and political division (Berkovich, 2020), and their fragmented nature (Vissher & Wittziers, 2004) can reinforce privatized practice. Therefore, it will be important to continually assess the department head team climate, recognizing that multiple coalitions and dynamics are at play (Mooney & Amazon, 2011).

Despite some caveats, department head leadership holds the most promise of the three proposed solutions: as an under-utilized resource, department heads have significant potential as change agents (Leithwood, 2016); their work with colleagues will improve student achievement (Lomos et al., 2011); and the flexibility inherent in small-team capacity-building allows for a shared, adaptive approach to addressing the PoP (Campbell-Evans et al., 2014).

## **Chapter 2 Summary**

The second chapter provides a rationale for using adaptive leadership in support of anti-exclusionary change. It then outlines how the Change Path Model and Organizational Congruence Model align to provide a strong framework for change management. An organizational analysis shows that the staff culture at CHS is limited in terms of change readiness, and this helps determine three potential solutions to the PoP. Leveraging the department team to foster anti-exclusionary change is selected as the strongest solution.

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

This final chapter is guided by the following theory of action: If department heads fulfil the potential of their leadership roles in support of anti-exclusionary education, then the resulting changes in professional culture will lead to increased achievement for marginalized and minoritized students. The chapter outlines an adaptive yet sequential change implementation plan to foster department head leadership and describes a communication strategy designed to support educator commitment and professional growth. Monitoring and evaluation strategies are then discussed. Lastly, next steps and future considerations are explored.

#### **Change Implementation Plan**

This Change Implementation Plan (CIP) recognizes that cultural change takes patience (Greuenert & Whitaker, 2015), optimism and persistence (Benson & Fiarman, 2020) in the face of multiple distractions (Katz & Dack, 2013). It is therefore attentive to tight-but-loose dynamics: while sharp goals and accountability measures limit innovation and ownership, overly loose plans result in “drift and inertia” (Trask & Cowie, 2022, p. 589). As such, the CIP uses the Change Path Model (Deszca et al., 2020) as a linear guide to sustain necessary focus (Katz & Dack, 2013; Moore Johnson, 2015) while maintaining the flexibility to be improvisational when necessary (Heifetz et al., 2009).

Appendix H shows the scope of the CIP and the interconnections between the elements it will address.

#### **The Change Path Model as a Scaffold for the Change Implementation Plan**

The Change Path Model provides the structure for a CIP designed to be carried out in a single school year, with the preparation (awakening) occurring in May-June of the previous

school year for a program launch in September. While communication and monitoring are important components of the CIP, these are addressed in later sections of this chapter.

***Short Term: Awakening (May to June)***

This initial stage of the CIP involves articulating the gap between the present state and the desired future (Deszca et al., 2020). In alignment with the Coherence Framework (Fullan & Quinn, 2016), the key leadership action is twofold: first, to focus direction on anti-exclusionary practice; and second, to clearly communicate to staff how strong department head leadership (Leithwood, 2016) and teachers' work as department members (Aubrey-Hopkins & James, 2002) will support positive change. It is crucial to challenge the school's comfortable and balkanized status quo (Gruenert & Whitaker, 2015) that perpetuates inequity, and this necessitates the fostering of a holding environment for introducing sufficient disequilibrium (Heifetz et al, 2009) to challenge but not threaten staff (Perry et al. 2015). The holding environment will be used to foster change efficacy, change valence, and change commitment (Wang et al, 2020) through strategic communication (Lewis, 2019) that leverages opportunities for department heads to motivate their curriculum teams.

Deszca et al. (2019) point out that "the change process won't energize people until they begin to understand the need for change" (p. 104). The impact of systemic barriers on academic grades (Brown & Gallagher-Mackay, 2020), educator professional judgement (Parekh et al, 2021), and student engagement (Iachini et al., 2013) will be shared via pertinent research and available school-level information. This includes EQAO data, course medians, final marks, and climate data. As discussed in Chapter 2, the ethics of sharing personalized data must be carefully considered. However, helping educators see the direct impact of inequity on their students will create the moral imperative for change (Fullan, 2003; Safir & Dugan, 2021; Sharrat & Fullan,

2011). Meanwhile, district equity policies, plus pressure to improve poor EQAO scores from the senior leadership team, will provide necessary external accountability (Fullan & Quinn, 2016).

***Medium Term: Mobilization (September to October)***

This second stage of the CIP focuses on coalition- and capacity-building for the department head team (DHT), which will be leveraged to reach the change vision (Deszca et al., 2019). Three key areas will be addressed. First, department heads will explore the potential of their roles as change agents (Dinham, 2007; Leithwood, 2016) and as members of a collaborative team (Fullan & Quinn, 2016). Second, each department head will set an anti-exclusionary departmental goal that aligns with the change vision and supports cohesion (Fullan & Quinn, 2016). Third, department heads will develop individual and team capacity to achieve their goals.

**A Retreat for Team Building and Goal Setting.** The CIP proposes a DHT retreat to launch this work. Learning conversation protocols will ensure that dialogue remains focused and professional (Katz & Dack, 2013; Katz et al., 2018; see Appendix I). The retreat will allow school administrators to gather a balcony-view perspective of department head dynamics, and to operate as participants and observers in order to identify the values, relationships, and potential conflicts within the team that may impact the change agenda (Heifetz et al., 2009). Also, the retreat will provide an opportunity to assess where department heads are on their leadership journeys and the individualized and team interventions that will be needed to support growth (Deszca et al., 2019).

Professional dialogue grounded in the change vision will result in purpose-driven goal setting (Fullan & Quinn, 2016). While a key attribute of adaptive leadership is giving work back to the people (Heifetz et al., 2009), it will be important to ensure that goals align with both the change vision (as discussed in Chapter 1) and system priorities.



**Exploring Unconscious Bias.** Following the retreat, the DHT will explore the unconscious biases that lead to deficit thinking and perpetuate inequities (Garcia & Guerra, 2004; Milner, 2008). The CIP places this difficult work after the retreat’s coalition-building because positive team relationships will increase its effectiveness (Davis et al., 2022). Addressing inequity means starting with ourselves (Benson & Fiarman, 2020), and we must deliberately and systematically explore our own biases (Cuir et al., 2021) while considering their impacts on our practice. It is imperative that the administrative team participate in this self-interrogation with department heads and share in the vulnerability (Benson & Fiarman, 2020). Therefore, the use of an external equity consultant will be necessary. This work will foster an atmosphere of bravery (Benson & Fiarman, 2020) in which challenging conversations become a part of the team culture (Singleton, 2020). Meanwhile, Gino and Koffman (2021) note the importance of developing specific strategies to address biases, including “calling out stereotyped views, reflecting on counter-stereotypical examples, adopting the perspectives of others, and increasing interactions with different kinds of people” (n.p.). This learning will help DHT members “tune their ears to deficit discourse and recognize it as an outward expression, or artefact, of a school’s deeper cultural levels” (Pollack, 2012, p. 887). Crucially, an important outcome of this work will be the refining of the goals set at the retreat to ensure they do not inadvertently reinforce barriers (Bacchi, 2017; Pomeroy, 2020).

**Implementing an Inquiry Cycle to Build Capacity.** The final focus of the mobilization stage is the implementation of a leadership-focused inquiry cycle that will support the DHT in achieving its goals. The selected model is Katz et al.’s (2018) revised inquiry framework (Appendix J) which is based on traditional learning cycles such as those discussed in Chapter 2. The revised framework is specifically designed to address adaptive leadership challenges, and

the key difference between traditional cycles and the revised model is its focus on planning for, and reflecting on, incremental leadership moves rather than taking an all-at-once approach to addressing problems (Katz et al, 2018). This is important when managing a complex holding environment (Heifetz et al., 2009), and it supports the iterative change needed to shift school culture. Crucially, the model foregrounds the deep reflection necessary for work involving the constant interrogation of biases and their insidious impact on practice (Chui et al., 2022; Milner, 2008). It also fosters a culture of data use and supports team building: department heads become each other's critical friends who support and challenge each other using focused leadership conversation protocols (Katz et al., 2018). Therefore, the mobilization stage of the CIP concludes with the DHT learning the value (why) and process (how) of the leadership inquiry cycle with the goal of fostering effective engagement.

***Medium to Long Term: Acceleration (October to March)***

Acceleration involves empowering others in support of the change vision, building momentum, and managing and celebrating incremental changes (Deszca et al., 2019). Maintaining disciplined attention is key (Heifetz et al., 2009), and the DHT, with support from the principal and vice principal, must focus on continued capacity-building at the individual and team levels (Stosich, 2016). At this stage, department heads will work with their department members to foster collaborative, anti-exclusionary practice through the establishment of routines for learning (Kallemeyn, 2014). These include regular meetings to share equity data, provide updates on departmental goals, and revise plans based on emerging evidence. It will also be important to schedule opportunities for teachers, including the department heads, to observe each other's teaching from an equity perspective. Department heads will continue to build consensus around the change vision (Deszca et al, 2019) and leverage their credibility as classroom teachers

(Lomos et al., 2011) to foster engagement. The ongoing use of the revised inquiry cycle, and regular check-in meetings with the DHT, will build momentum and support accountability. Progress, focused on student achievement, will be shared in a variety of ways, as described in the Strategic Communication Plan.

Normalizing talk about bias for all teachers is crucial at this stage (Benson & Fiarman, 2020), and department heads will work with administration to identify differentiated approaches for supporting staff in exploring their implicit biases based on learning needs and engagement (see CAST, 2023). Staff must be challenged, but not to the extent that deflection or defensiveness takes over (Perry et al. 2015). Depending on the learning needs and engagement levels of individuals and/or groups of staff (CAST, 2023), further work with external consultants or the district equity lead will be planned to provide necessary opportunities for deep reflection (Kulkarni et al., 2021), and release time will be provided where possible to allow for this to occur. Meanwhile, the DHT will continue to work with administration to further develop their leadership capacity in areas identified during the inquiry cycle and through their use of Katz et al.'s (2018) learning conversations protocol.

***Long-Term: Institutionalization (April to June)***

This final phase of the Change Path Model “involves the successful conclusion of the transition to the desired state” (Deszca et al, 2019, p. 54). However, this sense of finality sits in tension with the recognition that continued change will be necessary and may involve the use of new processes to meet the change vision (Deszca et al, 2019). In this instance, institutionalization means that reflective department head leadership becomes a school norm. Ongoing department head inquiry and, from there, regular department meetings focused on anti-exclusionary professional learning, become a part of the formal structures and professional

culture at CHS. Moreover, strong connections between departments are established in support of change (Tenkasi & Chesmore, 2003). The erosion of deficit thinking and its replacement with teacher hope that improved practice will positively impact disadvantaged youth (Milner, 2008), coupled with the resulting increase in collective teacher efficacy, will lead to improvements in student achievement (Haight, 2011). Progress will require ongoing communication and monitoring, both of which will be discussed in future sections of Chapter 3.

### **Managing the Transition**

A key challenge for changing mindsets and practice at schools is the lack of time available to meet outside of the classroom. Teachers at CHS are tightly scheduled, and their collective agreement places limits on the ability of principals to engage them in professional learning unless it is considered voluntary. As such, funds must be set aside to provide release time as well as catering to entice staff to attend meetings. This tension between the need for growth and unionized constraints is an ongoing issue in Ontario (Leithwood, 2016).

Additional factors that must be considered in relation to transition management include performance tracking, stakeholder and personnel engagement, and unanticipated barriers to the change agenda such as provincial or district priorities that detract from the work.

### **Using Key Performance Indicators as an Alignment Strategy**

UDSB uses Key Performance Indicators (KPIs) to quantify progress on district-level strategic priorities. KPIs are defined as “the critical (key) quantifiable indicators of progress toward an intended result” (Aavenir, 2023) and the senior team requires that all initiatives are scored in this way. While KPIs are grounded in neoliberal performativity (Redden, 2019) and misaligned with the critical theory orientation of this OIP, they can have a positive impact on organizational performance (Bhatti et al., 2014). As such, KPIs will be used in the evaluation of

this OIP for reasons of politically savvy (Winton & Pollock, 2014) alignment with district-level practices. KPIs will be drafted as a key part of the Monitoring and Evaluation Plan with stakeholder input, with the caveat that they will focus on building coherence in support of the achievement of marginalized and minoritized students. As such, KPIs will be leveraged to provide focus and accountability during the multifaceted and complex work of change.

### **Managing Stakeholder and Personnel Engagement**

A key premise of the CIP is that department heads will be active change leaders and leadership team members. Using Kellerman's (2008) typology of followers, the current team comprises supportive participants and engaged activists, representing a medium to high level of engagement. However, the focus on anti-exclusion is new to the team, and the recognition that team members have enabled and benefited from inequity (Benson & Fiarman, 2020) will likely result in some shame, guilt and grief (Aguilar, 2020). These negative emotions may impact motivation and reduce the belief that the change agenda is attainable (Stiles, 2008). As a formal leader, I must work to ensure that the holding environment is both supportive and challenging while being attentive to emotional strain (Leithwood & Beatty, 2008). Here, trust is key so that team members are open to sharing their discomfort (Berkovich, 2020). As the department head team coheres, it will be important to pay close attention to dynamics: for example, groupthink can limit critical reflection (Katz & Dack, 2013), and the intersection of interpersonal attitudes with the work of change must be carefully negotiated to maintain focus (Berkovich, 2020).

When department heads are working with their teams, their leadership skills, positionalities, and motivation levels will interact with departmental subcultures to impact fidelity to the change vision (Barber et al., 2011). Moreover, interpretations and recontextualizations of the change vision and goals will depend on department-level values and

commitments (Ball et al., 2011). Department perceptions of department heads will rest on micropolitical factors. As members of the principal's inner circle (Berkovich, 2020), their perceived credibility will be intertwined with the formal leader's. My role, then, will be to continually foster positive staff relationships while leveraging my formal position to symbolically empower the department head team (Barber et al., 2011).

Specific and individualized support may be needed for department heads to help them navigate their unique contexts. For example, it will be important to engage with resisters who may attempt to derail the work of change (Gaubatz & Ensminger, 2017). This complex work could be supported through peer mentoring and leadership coaching from central staff. Staff cogens could also be used. Ultimately, staff engagement with the change vision relies on leadership with high levels of concern for results and equally high levels of concern for people (Blake & Mouton, 1962). This is a difficult balance to achieve.

The other crucial stakeholder is the local district. UDSB's focus on alignment means that the CIP must be seen to support system goals. As such, conversations with the senior team, especially the school superintendent, must demonstrate that the CIP supports strategic priorities.

### **Implementation Challenges and Limitations**

The work of one school cannot remove entrenched systemic inequities because "we can't quickly undo centuries of history" (Benson & Fiarman, 2020, p. 22). As such, staff who engage deeply with the change vision may experience fatigue (Ormiston et al., 2022), especially since the impacts of COVID-19 continue to linger in terms of teacher mental health (Palma-Vasquez et al., 2021). Teacher burnout occurs more quickly than teacher efficacy (Pas et al., 2011), so fostering collective teacher efficacy (Donohoo, 2017) is essential to provide a buffer from distress and maintain optimism (Leithwood, 2013). This is especially important in a system

where the school-level focus of the CIP may be derailed by external priorities (Katz & Dack, 2013), leading to initiative fatigue (DeWitt, 2021). Constant refocusing and the maintenance of healthy, productive disequilibrium (Heifetz et al., 2009) is crucial.

As people wrestle with the new skills and understandings required to meet the change vision, an implementation dip is inevitable (Fullan, 2011). Dealing with this involves preparing staff for the dip's inevitability, pausing when necessary to regroup, and offering targeted support to move forwards once again (Fullan, 2011).

The CIP (see Appendix K for a summary chart) requires teachers to interrogate their biases for change to occur, but the extent to which targeted interventions lead to meaningful outcomes over time remains uncertain (Sukhera et. al, 2021). Indeed, it is unclear whether formal, structured bias training has any impact at all (Hagiwara et al., 2020). While this casts doubt on the ability of the CIP to foster authentic change, the moral imperative means the work must happen anyway. How this imperative is communicated is the focus of the next section.

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

Klein (1996) argues that change “can often flounder because not enough strategic thought is given to communicating” (p. 42). Therefore, a Strategic Communications Plan (SCP) will frame the change vision and support the capacity to enact it (Higgs & Rowland, 2005). It will focus on the dissemination of information and the soliciting of input from stakeholders (Lewis, 2019), primarily the educators at CHS. The SCP must be responsive to audience needs at different stages of the CIP, and provide multiple means of engagement (CAST, 2023) through a variety of media (Barber et al., 2011; Klein, 1996). First, the SCP will be introduced using Deszca et al.'s (2020) phases of the change process, with a focus on aligning communication with the Change Path Model and the CIP. Next, the SCP will be discussed more broadly with

reference to Lavis et al.'s (2003) framework for knowledge transfer. Here, communication channels and audience will be key considerations. Taken together, these two sections form the basis of the Knowledge Mobilization Plan.

### **Communication Needs for Stages of the Change Path Process**

Deszca et al. (2020) argue that different communication strategies should be used as change progresses. At the *pre-change phase* (Deszca et al., 2020), the goal is to solicit early support from senior leadership, and conversations with the school superintendent (the conduit to the senior team) will demonstrate alignment between the change vision and board policies and priorities.

Next, key stakeholders will be addressed during the *developing the need for change phase* (Descza et al., 2020) and the SCP will “provide a clear, compelling rationale for the change” (p. 350) in alignment with the awakening stage of the CIP. The focus here is CHS’s educators, whose shifting attitudes and practices will drive the change process. In this phase, Deszca et al. (2020) highlight the need for sticky messages, which Boster et al. (2018) define as “simple, unexpected, concrete, credible, emotional, and stories (SUCCES)” (p. 4). Sticky messages are thoughtfully crafted to be memorable and persuasive (Heath & Heath, 2007) and will be used during the sharing of the change vision with a focus on the students we know and teach in order to appeal to educator emotions (Sharratt & Fullan, 2011). Here, the UDSB strategic communications team will be a resource, and crafting messages with the department head team will support commitment-building and consistency.

Research is inconclusive as to whether gain-framed messages (which emphasize the advantages of engagement with the vision), or loss-framed messages (which emphasize the disadvantages of non-engagement) are most effective (Lewis, 2019). Therefore, sticky messages



that address the need for change from both perspectives will be developed, emphasizing that change is both morally necessary and attainable (Arkemanis & Harris, 2002).

At the *midstream change and milestone communication phase*, which aligns with the Change Path Model's mobilization and acceleration stages, communication with staff will be necessary in the areas of process and impact. Here, the DHT will provide leadership in support of the principal and vice-principal. In terms of process, it will be necessary to solicit and provide feedback around the use of new departmental mechanisms including Katz et al.'s (2018) revised inquiry cycle. Meanwhile, communication around the ongoing impact of the change process will be important, and celebrating small successes will help maintain momentum (Deszca et al., 2020). Because the CIP's leadership is somewhat diffuse and spread across departments, there is a risk that messaging may shift or that gossip or rumours may distract from the change vision. Here, "change agents have a choice: they can communicate clear, timely and candid messages about the nature and impact of the change or they can let the rumours fill the void (Deszca et al., 2020, p. 351). Therefore, an important part of the SCP will involve addressing back-channel communication that reveals conflicting interests (Ritchie, 2018).

Lastly, the *confirming and celebrating the change phase* aligns with the institutionalization stage of the Change Path Model and focuses on communicating the effectiveness of the change process while capturing the learning that occurred (Deszca et al., 2020). In this case, communicating teacher growth, and the increased achievement of marginalized and minoritized students, will be the focus. However, this phase does not mean that the communication work is complete. Rather, it will involve sharing next steps and preparing educators for further necessary changes through revised sticky messages.

With these communication phases in mind, the plan's knowledge mobilization framework will now be addressed.

### **Communication through a Framework for Knowledge Transfer**

Lavis et al.'s (2003) Knowledge Transfer Framework provides a clear structure for the planning and management of communication. It considers what decision makers need to know, who needs to share and receive knowledge, the communication methods to be used, and the impacts of the knowledge transferred. This section will use Lavis et al.'s (2003) framework to explain how, why, and to what ends communication will be used to support change.

#### ***Knowledge Transfer to Decision Makers***

The key decision makers in this SCP are the department heads at CHS whose leadership is central to school improvement (Leithwood, 2016). Department heads will use their decisional capital as formal leaders (Hargreaves & Fullan, 2012) to influence department members, and therefore require a strong understanding of the systemic and school-level evidence that undergirds the change vision. Not only must department heads recognize the interconnections between systemic barriers (Ray, 2019), implicit biases (Chiu et al., 2022) and educator practices (Cui, 2017; Parekh et al., 2021); they must also be equipped to use evidence in support of the sticky messages designed to promote the change vision. This will support the bridge-building between multiple individual and subcultural perspectives (Ball et al., 2012) that is necessary for transformation (Leithwood & Beatty, 2008).

Department head ownership of the change vision's sticky messages will help create momentum. However, they may need support from external consultants or the district strategic communications team in strategizing the best ways to reach their departmental audiences. This

work is crucial due to the strong correlation between shared vision-building and student achievement (Silins & Mulford, 2002).

It is important to communicate solutions as well as problems (Lavis et al., 2003), and department heads must develop an understanding CIP and its role in bringing about change. The CIP's processes, including the use of conversation protocols and the revised inquiry cycle, require learning, and a key aspect of the communication plan will be department head training to ensure they are proficient users of, and advocates for, the tools to be used (Al-Alawi et al., 2018).

### ***Knowledge Recipients***

It is important to craft messages to specific target audiences (Lavis et al., 2003), and the key audience for this SCP is the staff of classroom teachers at CHS whose attitudes and practices must shift, individually and collectively, to enact the change vision.

All other groups are secondary because their influence on the change process is less direct (Lavis et al., 2003). Of these secondary groups, the school board, via CHS's superintendent, will be informed of how the CIP is impacting performance on district level goals. Also, as recipients of change, students must be kept up to date with shifts in teacher instructional practice (Zaneldin, 2010). Regular cogens, particularly with student participants from marginalized and minoritized communities (Safir & Dugan, 2021), will provide opportunities for important two-way communication (Lewis, 2019) about the change process and its impact.

Parent communication at UDSB is mediated through the strategic communications team, and when it occurs must align with BSP priorities. However, one-on-one conversations with parents, particularly those on the school council, can be more candid and solicit input about the change process. Community agencies who work with CHS (such as the school's addictions counsellors and the local public health unit) are also a potential audience.

### ***Knowledge Transfer Agents***

As the formal leader in the school, the principal is the obvious conduit for information – the person who will foreground the change vision and report on its progress through communication with stakeholders. The role’s symbolic power lends credibility to the change agenda (Barber et al., 2011), and this credibility can be fostered (Baruti, 2022) through the building of relational trust at all stages of the communication process (see Tschannen-Moran, 2014; Tschannen-Moran & Gareis, 2017). Here, two-way feedback with stakeholders (primarily staff, superintendents and students) is an important communication strategy (Lewis, 2019) to monitor how the principal’s messaging is received.

As well as principal communication, department head communication is key. As middle-managers, department heads experience feedback from above and below (Branson et al., 2016), and act as boundary spanners (Lewis, 2019) between the principal and the teaching staff. Their role is to use communication to build “collegiality, cooperation and teamwork” (Branson et al., 2016, p. 130) and their specialist curriculum knowledge (Shulman, 2000) can lead to respect and allegiance from their colleagues (Leithwood, 2016). This will help department heads persuasively communicate with their teams.

### ***Knowledge Transfer Methods***

While there are a variety of communication mechanisms in place at CHS (ex., newsletters, group emails, staff meetings), interactive strategies are most effective (Lavis et al. 2003). Whole staff meetings, department head meetings, and department meetings must be scheduled regularly and structured in a way that allows for focused reflection and dialogue. Again, conversation protocols (Katz et al., 2018) are useful tools in this regard, and strategies to enliven formal meetings, such as the interactive use of technology, may help foster engagement

(Johnson, 2015). It is also worth noting that the conversation protocols and inquiry cycles are crucial communication mechanisms as conduits between departmental work and school-level leadership. Meanwhile, existing tasks such as the drafting of the annual improvement plan and cyclical school policy reviews will be leveraged to support the change agenda. Indeed, routine management tasks can be used to influence progress (Leithwood, 2013).

Beyond standard meetings, Barber et al., (2011) note the value of “unusual” communication (p. 203). As mentioned earlier, a department head retreat is proposed as a mechanism to launch the CIP: this opportunity for learning will provide a respite from the busyness of school and demonstrate the importance of the change agenda. Unusual ways to communicate with the staff might include off-site gatherings on professional development days, equity walkthroughs, or staff cogens. Social media will help share the work with a wider audience.

The principles of universal design are also applicable to communication strategies, and the SCP must provide stakeholders with multiple means of engagement, representation, action and expression (CAST, 2023). First, engagement opportunities will be designed to stimulate motivation and interest. These will include strategic conversations with individual teachers to help identify advocates for the change agenda (Novak & Rodriguez, 2016) and regulate the distress of others (Heifetz et al., 2009). Second, multiple means of representation will ensure that information is presented in ways that appeal to different stakeholders and stakeholder groups: beyond sticky messages, language and images must be tailored to various needs and preferences through multiple methods of communication, such as infographics, videos, and photographs (Novak & Rodriguez, 2016) that will augment but not replace interpersonal communication (Lavis et al., 2003). Third, multiple means of action and expression will provide differentiated

opportunities for people to share what they know, what they have learned, and what their next steps might be. For example, although courageous conversations are important venues for addressing our own biases and their impacts (Benson & Fiarman, 2020), a first step for some staff may be journaling or completing surveys (Novak & Rodriguez, 2016). A caveat here is that while communication will be differentiated, it must not become diffuse. Rather, it must align with the change path's phases to support sequential progress (Deszca et al., 2020).

### ***Knowledge Transfer Impacts***

The impacts of knowledge transfer are intertwined with the anti-exclusionary work of the CIP, the monitoring of which will be discussed in the next section. However, Lavis et al. (2003) note that knowledge transfer can be impactful in three ways.

First, instrumental use is defined as “solving a particular problem at hand” (p. 228). While instrumentalism is a key component of neoliberalism (Srivastava, 2010) and at odds with the conceptual framework of this OIP, the change vision is nonetheless invested in the academic achievement of marginalized and minoritized students. Second, conceptual use “involves a more general and indirect form of enlightenment” (Lavis et al., 2003, p. 228). Here, knowledge about systemic barriers will intersect with educator self-reflection around unconscious bias to drive change. Third, symbolic use relies upon “institutional contingency” (Moran, 2010, p. 889) whereby knowledge is shaped to fit the contexts in which it is used. Here, symbolic knowledge about inequity and the need for anti-exclusionary education will be harnessed to persuade CHS's teachers that de-privatized practice and increased CTE are morally necessary.

The above considerations inform the knowledge mobilization plan for this OIP, which combines Deszca et al's (2020) phases of communication and Lavis et al.'s (2003) framework for knowledge transfer (see Appendix L).

## **Change Process Monitoring and Evaluation**

Monitoring and evaluation are distinct yet connected mechanisms: monitoring is the ongoing process of data gathering to check that initiatives are on target, and evaluation is less frequent assessment used to track whether a change process has the desired effect (Scottish Council for Voluntary Organizations, 2023). Monitoring and control are crucial factors in the change process (Heystek & Emekako, 2020), and effective accountability can lead to increased educator motivation (Heystek & Emekako, 2020) and professional trust (Lefevre et al., 2020). Moreover, structures focused on continuous data review support the growth of internal and collective accountability over time (Knapp & Feldman, 2012). As such, monitoring and evaluation are promising tools for the development of an anti-exclusionary educator culture at CHS.

This section explores monitoring from a tight-loose perspective that aligns with the CIP. It draws on Simons's (1995) work to balance empowerment and control and uses the Change Path Model's sequencing to ensure linear progress despite the complexity of the adaptive challenge being addressed. A model for evaluation, based on the balanced scorecard (Kaplan & Norton, 1992), integrates the change drivers from the Coherence Model (Fullan & Quinn, 2016) and is presented as a tool for further staff capacity-building as next steps are developed.

### **Tight-Loose Monitoring for Achievement Targets and Cultural Growth**

This OIP addresses an adaptive challenge (Heifetz et al.) in which ambiguity and complexity are high and time to project completion is long (Deszca et al., 2020): shifting individual attitudes as well as professional culture will require ongoing diagnosis and analysis (Heifetz et al., 2009). As such, the choice of measures will be necessarily loose, with a focus on maintaining (and potentially adapting) the change vision, establishing milestones, and learning

through iterative change (Deszca et al., 2020). Qualitative measures are appropriate here (Markiewicz & Patrick, 2016). Conversely, the goal of increasing the achievement of marginalized and minoritized students allows for the use of more precise, goal-focused, quantitative measures (Deszca et al., 2020) such as course completion data and scores on standardized tests. Monitoring, then, will align with the tight-loose orientation of the CIP, and here Simons (1995) provides four tools that “reconcile the conflict between creativity and control” (n.p.). The first pair reflects the iterative, adaptive work that will occur in the holding environment, and the second pair are more traditional control mechanisms.

### ***Adaptive Monitoring: Interactive Control Systems and Belief Systems***

Interactive control systems focus on significant information that requires regular attention and review (Simons, 1995). This data is best discussed in face-to-face teams comprising representatives from different hierarchical roles and is “a catalyst for an ongoing debate about underlying data, assumptions, and action plans” (Simons, 1995, n.p.). Here, the work with the DHT, facilitated using Katz et al.’s (2018) revised inquiry protocol, will be a crucial monitoring mechanism as department goals are set, implemented and revised. Regularly scheduled meetings will be important to ensure this work becomes systematic.

Belief systems “communicate core values and inspire all participants to commit to the organization’s purpose” (Simons, 1995, n.p.). While this OIP strives to shift the professional culture at CHS to foster collaborative practice grounded in anti-exclusionary thinking, implicit bias training is often ineffective (Kalev et al., 2006) and sometimes inadvertently reinforces barriers (Gino & Koffman, 2021). As such, the careful monitoring of individual and collective staff attitudes using surveys (Gino & Koffman, 2021) and one-on-one conversations (Aguilar, 2020) will be important. It will be crucial to monitor department head beliefs here, as well as



those of the administrative team. Working with an external consultant and/or UDSB's equity lead will be important for principal and vice-principal self-reflection.

***Instrumental Monitoring: Boundary Systems and Diagnostic Control Systems***

Boundary systems and diagnostic control systems align with Ontario's focus on securing accountability (Leithwood, 2013) and ensure that procedural standards are met (Simons, 1995). First, boundary systems "set limits of authority and action and determine acceptable and unacceptable behaviour" (Deszca et al., 2020, p. 381). Here, it will be especially important to monitor the leadership activity of department heads. Leithwood (2016) notes that department heads are often reluctant to monitor colleagues' instructional practices, possibly due to established relationships they do not want to harm. However, although Ontario's labour landscape prevents department heads from evaluating teachers (OECTA, 2012), monitoring colleagues is an important part of the role (Leithwood, 2016). UDSB's expectations for department head leadership will be leveraged here to ensure that team members fully participate in the change process, and the work of individual department heads will be monitored through the sharing of department meeting agendas and minutes, regular one-on-one conversations in which progress data is shared, classroom observation notes from department head observations, and administrator observations of department meetings. The monitoring of department head responses to principal and vice principal leadership is also important due to the role formal leaders play in teachers' motivation (Eyal et al., 2011). To help avoid contrived compliance (Lockton, 2019) and support two-way communication (Lewis, 2019), department heads will be provided with opportunities to monitor and provide feedback on principal and vice-principal leadership through the change process (DeWitt, 2016).

Lastly, diagnostic controls monitor critical performance outcomes (Simons, 1995). With the key outcome for this OIP being improved academic attainment for marginalized and minoritized students, the monitoring of at-risk reports, mid-term and final grades, EQAO scores and post-secondary pathways (Brown et al., 2020) will track shifts in achievement. Also, the monitoring of teacher-assigned learning skills will provide evidence of whether teacher perceptions of marginalized and minoritized students, and those with special educational needs, continue to show bias (Parekh et al, 2021).

Taken together, Simon's (1995) measurement systems provide a framework for tight-loose monitoring that requires a mixed-methods approach for data collection (Markiewicz & Patrick, 2016). While some of these tools are discussed earlier as part of the communication plan, they provide double duty. This is because, broadly speaking, two-way communication is a mechanism for monitoring perceptions, reactions, and perceived barriers (Heifetz et al., 2009; Lewis, 2019). For example, cogens with staff or students to share information about the change process will also provide information about their perceptions of change. With these tools in mind, monitoring will now be considered in the context of the Change Path Model.

### **Monitoring and the Change Path Model**

The enactment of this OIP will involve significant flexibility as the school culture adapts, yet it must also follow a sequence, as described in the CIP. As such, it is necessary to address specific monitoring strategies to be used during each phase.

#### ***Awakening (May-June)***

The awakening stage focuses on outlining the change vision and need to change, fostering change readiness, and soliciting engagement. Here, it will be necessary to focus on monitoring the change readiness of individual department heads and the DHT through one-on-

one conversations and team discussions. This information will be triangulated using a change readiness survey adapted from Claiborne et al. (2013) that specifically addresses the change vision, and the responses will help guide further conversation and the planning of next steps. The survey will also be used for the whole staff to help provide a balcony view of educator attitudes (Heifetz et al, 2009). Here, the survey will be anonymized to promote greater disclosure; especially important due to the sensitive nature of the topic (Murdoch et al, 2014). Again, responses will be used to determine necessary next steps to prepare staff for the change, recognizing that the work must begin regardless (Fullan, 2011).

### ***Mobilization (September-October)***

At the mobilization stage, department heads will explore the potential of their role, and this work will be monitored through focused conversations, both individually and as a team. As discussed earlier, structured conversation protocols are important to promote deep learning (Katz & Dack, 2013; Katz et al., 2018). However, Jones et al. (2019) note the value of two two-way, informal discussions, including casual dialogue and unscheduled dialogue. These conversations help foster reciprocal, collaborative relationships (Gordon, 2017). As such, combining formal mechanisms with informal conversations will support professional learning (Thomson, 2015) and provide rich feedback.

It will be important that informal conversations address educator motivation, which is a key factor in school performance (Taylor et al., 2014). Also, it will be necessary to monitor department heads' personal accountability for the change vision (Heystek & Emekako, 2020) and the growth of team collective efficacy. Here, tools from Donohoo (2017) will be used to track progress. Internal accountability is important for the setting of authentic goals (Heystek & Emekako, 2020), and the goal-setting process must be monitored to ensure that department heads

set goals that align with the change vision. It is also essential that department heads place sufficient value on the goals and have the drive to attain them (Ravinshanker & Alpaio, 2022). Here, monitoring conversations will be combined with opportunities for department heads to provide feedback in formats they identify as helpful and engaging (CAST, 2023). Monitoring pertaining to the interrogation of biases is described in the context of belief systems, above.

### ***Acceleration (October-March)***

This stage is the most complex and iterative because it involves department heads working as leaders with their teacher teams and teachers shifting their attitudes and practices. Again, tight-loose monitoring is important, because while it will be necessary to set clear agendas and routines for the work that DHT members will do within their departments (Kallemeyn, 2014), they must be allowed sufficient autonomy to confidently adjust as needs shift (Dinham, 2006). Monitoring from the principal and vice-principal will also be necessary to determine where department heads may require additional support or mentoring as leaders. Here, the OLF (Leithwood, 2013) can be used to identify and discuss specific areas of growth.

In terms of department-level progress, the key monitoring mechanism will be the DHT's use of the revised inquiry cycle (Katz et al, 2018). Here, "sticking with the template matters" (Katz et al., 2018, p. 118), and regular team meetings will "add an aspect of accountability to the leadership inquiry process (because of the social pressure)" (Katz et al., 2018, p. 118). The impact on teacher practice will be considered during learning walks (City et al., 2010), and the impact on culture must be monitored separately through teacher cogens and, towards the end of the time period, the use (but not overuse) of staff surveys (Gino & Koffman, 2021). Small, protocol-based group conversations scheduled during staff and department meetings will monitor shifts in thinking around biases (Benson & Fairman, 2020), and cogens with minoritized and

marginalized students will identify the extent to which staff are perceived as culturally responsive allies (Style, 2014).

### ***Institutionalization (May-June)***

As mentioned earlier, institutionalization does not mean the work is done. However, it does mean that the initial CIP cycle is complete and will be reviewed so that planning for the next school year, beginning in May, can begin. It also means that the processes used for this OIP, centered on department head leadership and departmental collaboration, are becoming entrenched at CHS. Therefore, this stage warrants an evaluation process to judge program performance to date (Markiewicz & Patrick, 2016).

### **Evaluation**

The proposed evaluation tool for this OIP brings together Fullan and Quinn's (2016) change drivers for coherence and Simons's (1995) four levers of control in an adapted model of the balanced scorecard (Kaplan & Norton, 1996). The balanced scorecard is designed to integrate important measures into a tracking tool that provides leaders with an "integrated and aligned perspective" (Descza et al., 2020, p. 389) that connects initiatives with the change vision and measures their success (Kaplan & Norton, 1996). It also provides an opportunity to determine which areas require further attention (Descza et al., 2020), and whether improvement in one area has occurred at the expense of another (Kaplan & Norton, 1992).

Appendix M shows the proposed balanced scorecard for evaluation. The *focusing direction* quadrant will measure the perceived clarity of the strategy and the related department head goals, as well as the success of the administrative team and DHT in maintaining focus on the change agenda. The *deepening learning* quadrant will address the extent to which staff members grow in awareness of their implicit biases and their roles in upholding and/or

challenging inequity. The *cultivating collaborative* cultures quadrant will consider how department teams are working together to improve anti-exclusionary practices, and the *securing accountability* quadrant will consider the extent to which student outcomes are improving. It will also measure educator ownership of, and participation in, the change agenda (Pierce et al., 2018).

Key Performance indicators (KPIs) for each quadrant will be determined and refined during the mobilization and acceleration stages and measured using the 0-1.0 scale favored at UDSB. The school leadership team, comprising administration and department heads, will draft these indicators and they will be shared among staff. The school superintendent will also be invited to participate in this work, recognizing the need to align school-level KPIs with district-level strategic priorities. A caveat is that KPIs may shift as understanding of the change process develops – hence the drafting of the KPIs once the change work is underway.

The proposed balanced scorecard also includes stakeholder evaluation questions at each quadrant. These questions replace the objectives, measures and targets that appear on generic balanced scorecards (Kaplan & Norton, 1996). The reason for this is twofold: first, there is significant value in stakeholder involvement when determining evaluation questions because it encourages active participation in the change agenda; and second, because it can support capacity building around what needs to be done (Markiewicz & Patrick, 2016). In writing questions and ensuring they align with the KPIs, participating stakeholders—in this context, educators at CHS—will further develop their understanding of the goals to be addressed. This could be an opportunity to create a sub-committee of non-department heads interested in developing their leadership skills, provided that additional training is provided (Labin et al., 2012). Questions from students that arise during cogens will also be incorporated. Here, Kaplan

& Norton's (1992) question, 'How do we look to shareholders?' (n.p.) can easily be adapted to address the students we serve.

### **Monitoring for Iterative CIP Refinement and Anti-Exclusion**

The design of the CIP and the monitoring plan provide multiple opportunities to refine the process at each stage of the change journey. Utilizing adaptive leadership practice, as described in Chapter 2, will help ensure that the holding environment is one in which productive disequilibrium is maintained (Heifetz et al., 2009). Meanwhile, the centrality of DHT inquiry is grounded in determining iterative next steps (Katz et al., 2018) as the change progresses. A key challenge is that the work of monitoring will be carried out by a White, middle-class leadership team with a White, middle-class staff. There is a risk that our language use (Pomeroy, 2020), our categorizations of difference (Bacchi, 2017), and our lingering deficit thinking (Clycq et al., 2014; Garcia & Guerra, 2004), may limit our sense of what is possible for our students (Petroni & Lewis, 2012). Seemingly innocuous professional judgements may reinforce existing inequities (Parekh et al., 2020). Two dangerous themes in data-use initiatives are important here: first, they often ignore the injustices that shape student outcomes; and second, they can lead teachers to attribute student performance to causes unrelated to their practice (Bertrand & Marsh, 2021). In addition, teacher use of data often leads to tracking and ability grouping rather than meaningful differentiation to support learners (Datnow & Park, 2017). It is crucial to be alert to these pitfalls as monitoring takes place and, again, to gather feedback from students about their experiences of the change journey.

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

Systemic inequity is deeply entrenched and permeates education (Ray, 2019). After the CIP is enacted, it will be essential to determine the next best moves (Katz et al., 2018) to

continue to shift CHS towards anti-exclusionary practice. In this sense, the CIP is the first phase of a learning cycle that will lead to future cycles, and future CIPs.

The focus on the DHT is grounded in the underutilized nature of this group in secondary schools (Leithwood, 2016). Therefore, the success of the CIP is largely dependent on the ability of team members to enact strong leadership as change agents, and to work collaboratively to support coherence across curriculum areas. At UDSB, department heads are hired from within the school for three-year terms. Rather than seniority-based appointments, an interview process is used for selection. An important next step will be to seek out and develop future department heads from the current staff. Also, as staff turnover occurs, new teachers will need to be onboarded in their departments and supported with anti-exclusionary mentorship that builds professional trust and confidence (Demerath, 2018). At UDSB, principal and vice-principal assignments can change without notice due to district needs, and department head tenures are typically significantly longer than the formal school leaders' (Dinham, 2007). Therefore, it is imperative to ensure that the DHT owns the work if it is to continue once a new principal has been appointed. This foregrounds the need for ongoing, cyclical capacity building in the areas identified in the CIP.

All UDSB schools (indeed, all schools) are seeing the impacts of inequitable structures (Ray, 2019) and practices (Cui, 2017; Parekh et al., 2107). Seeking ways to share the learning from CHS with the district is an important next step. Here, networked learning communities (Katz & Earl, 2007) show promise.

Changing political, social, economic, policy and technological contexts will impact the work of this OIP. Ministry directives and district priorities may challenge momentum. Continuing to foreground the change-work will be a necessary challenge, and leveraging



unanticipated circumstances in support of the agenda is both possible and necessary (Fullan & Quinn, 2016).

### **Chapter 3 Conclusion**

This final chapter outlines the change implementation plan to address the problem of practice. It also describes a communication plan and monitoring and evaluation strategies. The work is grounded in leveraging the department head role to shift school culture in support of marginalized and minoritized students. Next steps and future considerations are discussed.

### **OIP Conclusion and Narrative Epilogue**

This OIP is an attempt to address stubborn, deep-seated societal and educational barriers through anti-exclusionary, equity-seeking work at the school level. Time-pressures, disparate provincial priorities and neoliberal performativity are just some of the challenges school leaders face when striving to make a difference. However, the work of this OIP demonstrates that current circumstances, however imperfect, can be leveraged to positively impact students. Indeed, existing structures – in this case, the traditional department head team – have significant potential to drive change when they are used strategically.

As a secondary school principal whose length of tenure at any given school is uncertain, this OIP provides a clear roadmap for change at any UDSB secondary school, recognizing that the department headship is a typically underutilized role (Leithwood, 2016). This work has transferable value, and I will seek out opportunities to share it.

Engaging in the Western EdD program is a humbling and enriching experience. I came into it with a strong sense of the “why” of equity, but the “what” and “how” were elusive. The work of the OIP has been instrumental in developing my understanding of organizational change and my work as a school leader. Hopefully, marginalized and minoritized students will benefit.

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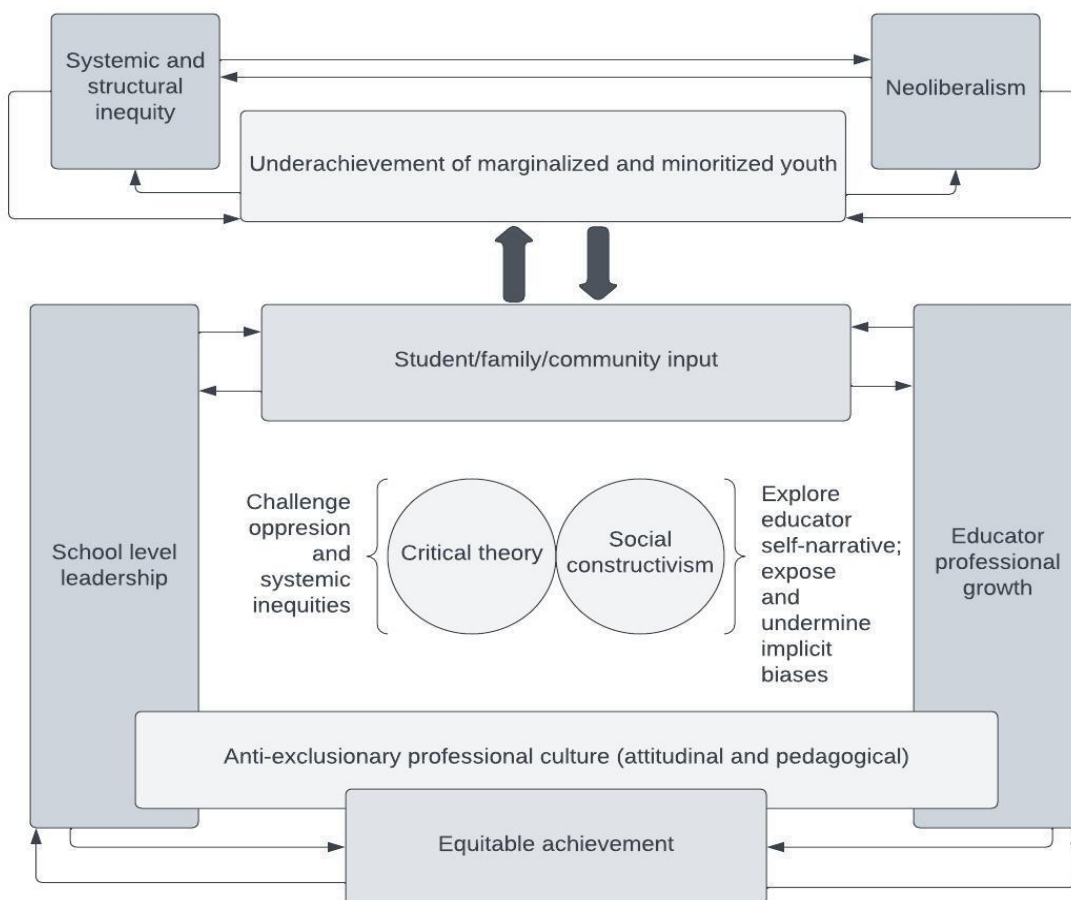
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## Appendix A: Conceptual Framework for the Organizational Improvement Plan



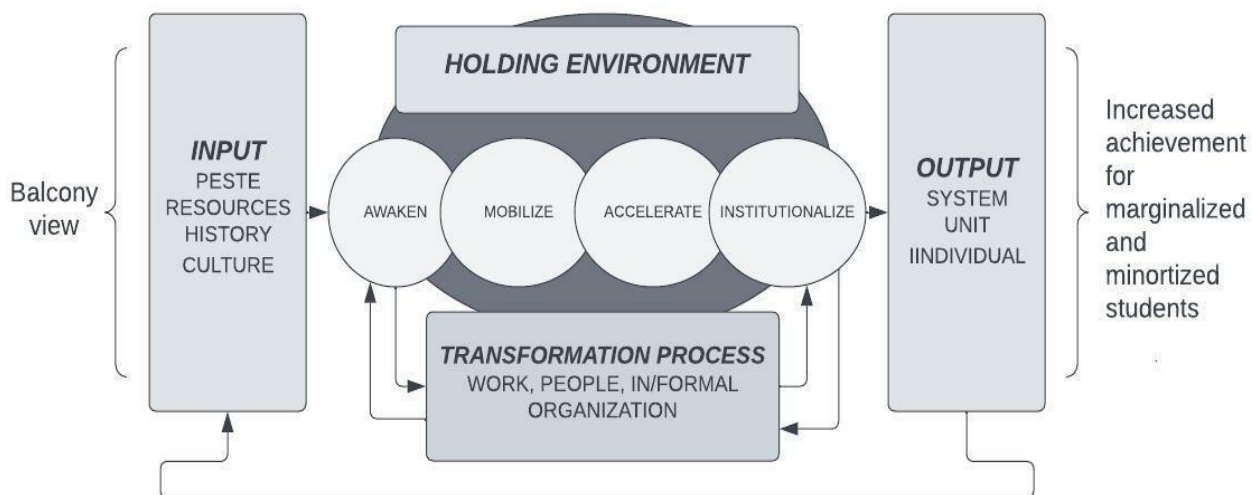
*Note.* The scope of this conceptual framework is school-level change.

### Appendix B: Comparing Transformational and Adaptive Leadership

Transformational Leadership	Adaptive Leadership
<p>Focused on “charismatic and affective elements of leadership” (Northouse, 2019, p. 163).</p> <p>Leaders motivate followers through inspiring a collective vision, and this work is grounded in the leader’s ability to influence others.</p> <p>Aligns with trait-based leadership: leaders are dominant, self-confident, and have strong moral values that, in turn, engage followers and lead to high expectations.</p> <p>Lacks conceptual clarity and processes but has a string focus on values and morals.</p>	<p>Focused on addressing complex adaptive challenges.</p> <p>Leaders create a vision for change based on the careful diagnosis of needs. Giving work back to the people is a key leadership behaviour.</p> <p>Aligns with the follower-centred approach: leaders ground their behaviours in the problem to be addressed and are focused on how people shift their attitudes and practices to meet the adaptive challenge.</p> <p>Provides clear leadership behaviours while allowing for the messy, iterative nature of complex change.</p>
<b>Summary</b>	
<p>The transformational leadership approach, grounded in the personal skill set of a charismatic leader, relies upon motivational strategies to bring about change. It is “fundamentally morally uplifting” (Northouse, 2019, p. 179) and therefore seems appropriate for anti-exclusionary leadership; but it lacks guiding processes to bring about change. Meanwhile, adaptive leadership provides a clear set of leader behaviours. While adaptive challenges are not necessarily moral in nature, adaptive leadership provides a strong roadmap for the complex task of shifting educator mindsets and practices at CHS.</p>	

*Note.* The information in this chart is synthesized from Heifetz et al. (2009), Northouse (2019), and Notgrass (2014). The chart is included because of questions received during a presentation of the OIP’s key components to peers in the Ed.D. program. Peers wondered whether transformational leadership might be a preferred approach for this OIP due to the need for cultural change (or transformation). This chart is intended to augment the reasons for selecting adaptive leadership, as described in Chapter 2 of this document.

**Appendix C: The Interrelationships between Adaptive Leadership, The Change Path Model, and the Organizational Congruence Model**



*Note.* Inputs and outputs are mediated through the holding environment, in which the work of change occurs. The four stages of the Change Path Model provide the forward momentum for the transformation process. This diagram is adapted from Deszca et al. (2020) Heifetz et al. (2009), and Nadler and Tushman (1989).

### Appendix D: School Culture Typology Activity, Completed for CHS

	TOXIC	FRAGMENTED	BALKANIZED	CONTRIVED COLLEGIAL	COMFORTABLE COLLABORATIVE	COLLABORATIVE
STUDENT ACHIEVEMENT	__ Many teachers believe that if students fail it is the students' fault	__ Teachers usually do not discuss issues related to student achievement	__ Most teacher discussions related to student achievement are restricted to within departments, cliques, or close friends	__ Teachers are given time to discuss student achievement and are expected to use it for that purpose	__ Teachers are given time to discuss student achievement but spend most of this time giving one another advice	__ Teachers are given time to discuss student achievement and spend this time critically analyzing one another's practice
COLLEGIAL AWARENESS	__ Many teachers do not care about the effectiveness of other teachers	__ Most of the teachers are unaware of what other teachers are teaching	__ Most teachers are aware of only what their friends in the school are teaching	__ School leaders expect teachers to know what their colleagues are teaching	__ Teachers occasionally observe and discuss what their colleagues are teaching	__ Teachers seek out opportunities to observe and discuss what other teachers are teaching
SHARED VALUES	__ Values that many teachers share don't fit the students' needs	__ There is not much agreement among teachers concerning educational values	__ There are small groups of teachers who share educational values	__ School leaders provide teachers with a list of school values	__ Teachers generally agree on education values	__ Teachers strongly agree on educational values
DECISION MAKING	__ Decisions are easily made because many teachers don't care what happens	__ Teachers are usually not interested in participating in decisions that concern students	__ There are small groups of teachers who attempt to control all decisions concerning students	__ School leaders expect teachers to participate in all decisions concerning students	__ Teachers occasionally show an interest in decisions made concerning students	__ Teachers are expected to participate in decisions concerning students
RISK TAKING	__ Many teachers protect their teaching styles from "innovation"	__ Most teachers typically do not experiment with new ideas	__ Innovations are usually initiated within a single grade or department	__ School leaders mandate that teachers try new ideas	__ Teachers occasionally like to experiment with new ideas	__ Teachers are constantly looking for new ideas
TRUST	__ Teachers talk behind their colleagues' backs	__ Trust among teachers is not considered necessary	__ There are teachers who trust only certain colleagues	__ Teachers are placed in situations where they are required to trust each other	__ Trust among teachers is assumed and not a critical issue	__ There is strong interdependence among teachers

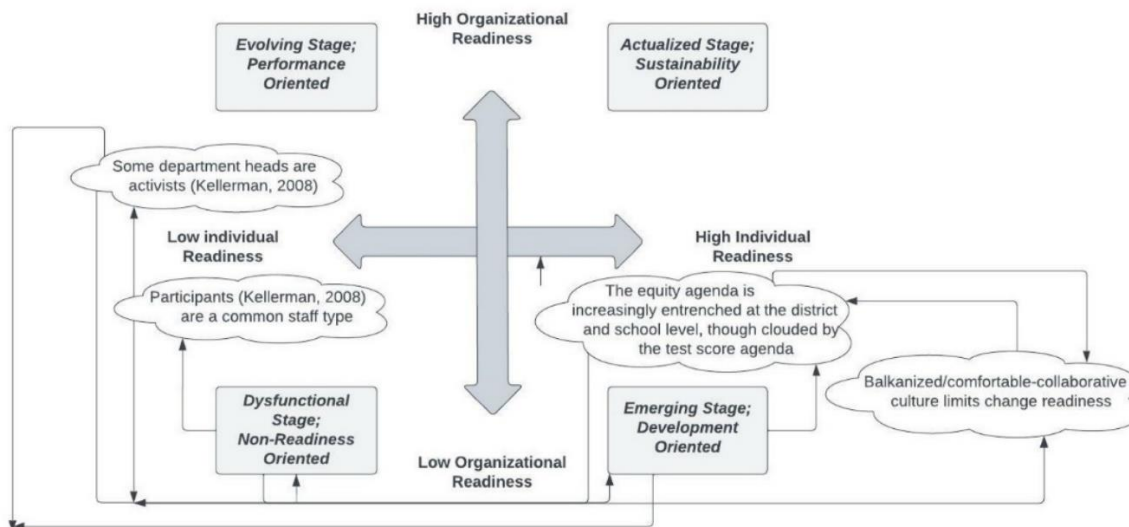
	TOXIC	FRAGMENTED	BALKANIZED	CONTRIVED COLLEGIAL	COMFORTABLE COLLABORATIVE	COLLABORATIVE
OPENNESS	__ Teachers who are committed to students and learning are subject to criticism	__ Teachers usually are not interested in suggestions concerning instruction made by other teachers	__ Teachers usually keep their opinions about instruction among their friends	__ Teachers are expected to contribute to discussions about effective teaching at meetings	__ Teachers are occasionally open to giving or receiving advice concerning instruction	__ Teachers are very interested in their colleagues' opinions concerning instruction
PARENT RELATIONS	__ Many teachers avoid parents whenever possible	__ Teachers would rather not have parents' input regarding instructional practice	__ There are cliques of teachers that parents perceive as superior to others	__ School leaders require teachers to be in contact with parents regularly	__ Most teachers are comfortable when parents want to be involved in instructional practices	__ Teachers actively seek the involvement of parents in classroom instruction
LEADERSHIP	__ School leaders are seen as obstacles to growth and development	__ School leaders are not very visible in the school	__ School leaders frequently visit or praise the same teachers	__ School leaders monitor teacher collaboration	__ School leaders encourage teachers to give each other advice without being too critical	__ School leaders challenge ineffective teaching and encourage teachers to do the same
COMMUNICATION	__ School policies seem to inhibit teachers' abilities to discuss student achievement	__ Communication among teachers is not considered important	__ It is difficult to have productive dialogue with certain groups of teachers	__ Communication is dominated by top-down mandates	__ Warm and fuzzy conversations permeate the school	__ Any teacher can talk to any other teacher about teaching practice
SOCIALIZATION	__ New teachers are quickly indoctrinated by negative staff members	__ Teachers quickly learn that the school has an "every man for himself" culture	__ New teachers are informally labeled, the typecast as belonging to certain teacher cliques	__ There are many mandatory meetings for new teachers to attend	__ New teachers are encouraged to share their experiences with other faculty members	__ All teachers assume some responsibility for helping new teachers adjust
ORGANIZATION HISTORY	__ New teachers are quick to share negative stories about the school	__ "Teachers asking for help" has traditionally been considered a professional weakness	__ Some grades, departments, or teams consider their successes as separate from the whole school	__ School leaders have established strong control over much of what goes on at school	__ The school is known for its constant celebrations	__ There is an understanding that school improvement is a continuous issue



TOTAL	Column A: _____	Column B: _____	Column C: _4_____	Column D: _4_____	Column E: _____	Column F: _____
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*Note.* This chart is a direct copy of that provided in Greunert, S., & Whitaker, T. (2015), *School culture rewired*, pp. 67-69). Copyright 2015 by ASCD. The chart was completed by the administrative team at CHS, with selections/responses highlighted in pale grey.

## Appendix E: Organizational Change Readiness at CHS



*Note.* This figure, adapted from the work of Wang et al. (2021) shows how cultural components at CHS align with stages of change readiness.

## Appendix F: Mechanisms for Integrating Student Voice

### *Pre- and Post-Initiative Student Consultation*

Meaningful consultation leads to increased student belonging and a positive attitude towards learning (Ruddock & Fielding, 2006). Also, staff will be more likely to address concerns stemming from students they know and care about (Sharratt & Fullan, 2012). As such, carefully selected student teams (Safir & Dugan, 2021) would be consulted during the change process changes to provide input and reflect on their experiences of new classroom experiences. Also, student exit cards with strategic prompts would be easy to collect and would provide valuable feedback on new practices (Marzano, 2012) from large sample groups.

### *Focus Groups and Forums*

Student focus groups (Natishan et al., 2000) or broader, community-based forums (Baroutsis et al., 2016) could generate meaningful data to provide feedback on educator practice and the evolving school culture. Solution 2's use of external consultants is the best fit for this strategy because marginalized youth are more likely to be open with a third party: with known authority figures, they may repress their voices to avoid conflict (Emdin, 2010). However, the mechanism could still be used. For example, the board's special assignment teacher for equity could be engaged to manage forums, or one-time consultants could be hired if funds permit.

### *Co-generative Dialogues*

This model for student input provides a "powerful way to listen with a mindset of radical inclusion" (Safir & Dugan, 2021, p. 178). Co-generative dialogues, or cogens (Emdin, 2010) are structured, small-group discussions that occur over four or more short, usually weekly sessions. While educators select participants, the intent is to include a cross-section of demographics and marginalized voices (Safir & Dugan, 2021). Cogens use a specific discussion protocol (see below to address student perceptions of teaching and/or leadership and could bring forward new diagnoses or iterative solutions and help monitor and evaluate change. Also, they could be used at multiple points of the change process in all three proposed solutions.

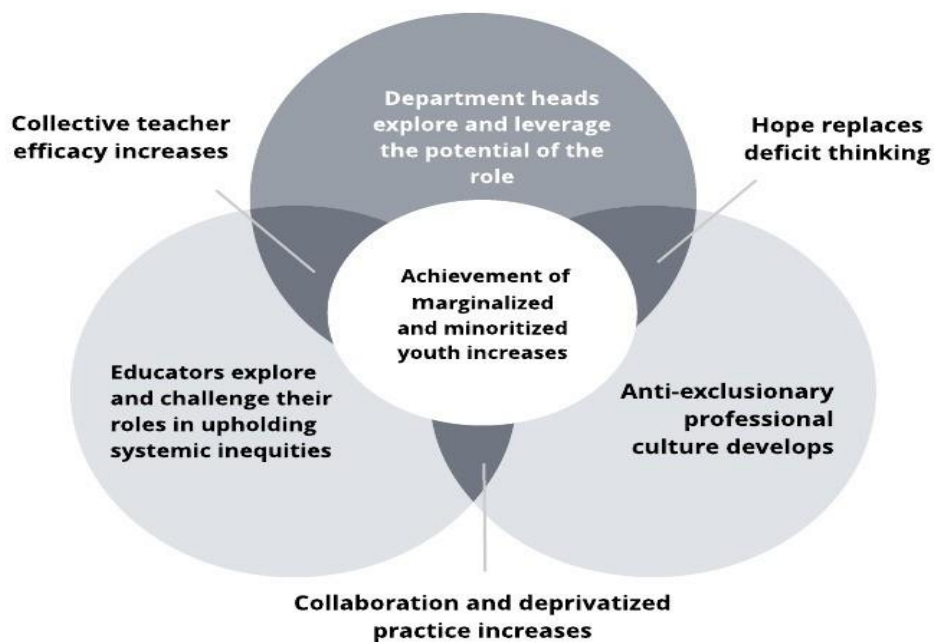
## Appendix G: The Cogens Protocol

Here are a few steps to experiment with cogens as a listening strategy:

- Identify a group of four to five students (or adults) who represent a cross-section of perspectives, demographics, and ability levels. Be sure to include some of the least heard voices.
- Arrange an initial meeting, outside of class time, and make a personal invitation to each student: “I am working on improving my teaching or leadership and really value your perspective.”
- Set ground rules for the discussion, such as “Only one person speaks at a time”, “Everyone has an equal voice”, and “If you have a critique, offer a suggestion.”
- Brainstorm issues the group could work on together. Take deep breaths and listen deeply for what is said and not said. Invite candor from participants.
- Invite the group to choose a small classroom (or leadership) issue to work on together. Ask for their ideas around how to improve the issue.
- Meet with the group at least four times, roughly once a week, or until you all feel successful at improving the identified issue. In the final session, celebrate impact and reflect on learning: “What was this experience like for you? What did we learn together?”
- Invite a new, representative group into a new cogen with you. Rinse and repeat!

*Note.* This outline of the cogens protocol, grounded in the work of Emdin (2010), is reproduced from Safir, S., & Dugan, J. (2021), *Street data: A next-generation model for equity, pedagogy, and school transformation*, p. 179, Corwin. Copyright 2021 by Shane Safir.

## Appendix H: The Interconnections Between Elements Addressed in the Change Implementation Plan



*Note.* The achievement of marginalized and minoritized youth (centre) is the goal of the CIP.

Department Head Leadership (dark grey) is the key catalyst for change.

## Appendix I: Katz et al.'s (2018) Learning Conversations Protocol

Protocol rules:

1 facilitator (rotating)

1 leader presenter

Everyone else: critical friend analysts/feedback providers

### Setting the Stage for the Protocol

Facilitator to review the norms as well as the “why” behind them:

- follow the steps
- no placing blame
- tolerate discomfort in the process
- leader presenter to take their own notes
- everyone else to keep a parking lot for personal connections (AKA be selfish!)

#### 1. Introduction (5 to 8 minutes)

- The facilitator reviews the “why” behind this step
- Leader presenter to briefly explain where they are in the process – leadership inquiry, last few next best learning moves, reflections learning from and about the moves – using their updated inquiry template as support

#### 2. Clarifying the Leader Presenter’s Work (5 to 8 minutes)

- The facilitator reviews the “why” behind this step
- The group asks clarifying questions to fill in any gaps
- The group offers no judgements or interpretations about what the leader presenter was doing and no suggestions
- Leader presenter answers specific questions in a crisp and precise manner

#### 3. Interpreting the Leader Presenter’s Work (8 to 10 minutes)

- The facilitator reviews the “why” behind this step
- The group tries to understand the leadership inquiry and or latest learning move(s) at a deeper level
- Each individual puts forward how they are conceptualizing or representing what the group has heard
- Group members avoid any push to consensus and put forward as many different ways of thinking about the inquiry as possible
- Group members offer no suggestions
- Possible prompts:
  - I think I heard or didn't hear [leader presenter] say that...
  - This makes me think about...
  - I wonder if this issue is really about...
  - I am curious why [leader presenter] would think that...

- I wonder what assumptions [leader presenter] is making in order to draw those conclusions...
- Leader presenter:
  - Doesn't speak, listens to how they have been understood by the group
  - Asks themselves, "Why would they think that?"
  - Works on active listening – agree before you disagree. Asks themselves, "Why might they be right?"

#### 4. Quick Clarification (2 minutes)

- The facilitator reviews the "why" behind this step
- Group members ask any additional questions of clarification that have come up
- Leader presenter can clear up any inaccuracies or missing information but not more than that

#### 5. Implications for Thinking and Practice (8 to 10 minutes)

- The facilitator reviews the "why" behind this step
- Group members discuss the implications for the leader presenter's learning or where they think the leader presenter should go next in their thinking based on what they've heard and discussed
- Possible prompts:
  - I think [leader presenter] really might want to think about...
  - I think a possible next step in [leader presenter's] learning might be...
  - Is there other evidence that can be gathered around...?
  - What do you think about [leader presenter] trying to learn...?
- Leader presenter doesn't speak and works on active listening

#### 6. Consolidate Thinking and Plan Next Steps (5 minutes)

- The facilitator reviews the "why" behind this step
- Leader presenter refers to their notes and summarizes what they are thinking with input from the group. What resonates?
- If possible, leader presenter talks about the next best learning move

#### 7. Reflections on the Process (5 to 8 minutes)

- The facilitator reviews the "why" behind this step
- Leader presenter reflects on their learning from the collaborative analysis by being asked: How did we push your thinking and add value because we were together?
- Each member of the group shares one thing that was put in their "parking lot" of personal connections

The whole group reflects on the process of using the protocol (what did/didn't work well in terms of the intended learning conversation)

*Note.* Reproduced from Katz, S., Dack, L.A., & Malloy, J. (2018). *The intelligent, responsive leader*, pp. 154-155. Copyright 2018 by Corwin.

## Appendix J: The Revised Inquiry Framework

### **The Revised Inquiry Framework**

- 1) Develop an inquiry question (What's your challenge of professional practice and why?)
- 2) Determine your "next best learning move" (How do you intend to intervene and why?)

### **For *each* "next best learning move":**

- 1) Develop a plan to investigate the hypothesis
- 2) Determine success criteria *and* associated evidence to be collected (and how)
- 3) Implement the plan
- 4) Analyse the evidence in relation to the success criteria
- 5) Reflect on the learning
- 6) Determine "next practice" (the next "next best learning move") for the inquiry cycle to continue

*Note.* Reproduced from Katz, S., Dack, L.A., & Malloy, J. (2018). *The intelligent, responsive leader*, p. 105. Copyright 2018 by Corwin.



### Appendix K: A Summary of the Change Implementation Plan

<p><b><u>Awakening</u></b>  <i>What must change?</i>          Focus on all staff</p>	<ul style="list-style-type: none"> <li>• Outline change vision and need to change</li> <li>• Foster change readiness: solicit engagement through moral imperative</li> <li>• Connect with district priorities to leverage accountability</li> </ul>
<p><b><u>Mobilization</u></b>  <i>How will we lead?</i>          Focus on department head team</p>	<ul style="list-style-type: none"> <li>• Examine potential of department head role with the team</li> <li>• Foster collaborative department head team culture</li> <li>• Set anti-exclusionary department head goals</li> <li>• Begin to interrogate unconscious bias with department heads</li> <li>• Introduce cycle of inquiry to address goals</li> </ul>
<p><b><u>Acceleration</u></b>  <i>How will we establish momentum?</i>          Focus on departmental growth through department head leadership</p>	<ul style="list-style-type: none"> <li>• Work on anti-exclusionary practice, aligned with change vision, in departments</li> <li>• Begin to interrogate unconscious bias with department teams</li> <li>• Operationalize and embed department head inquiry cycle and make incremental moves to achieve goals</li> <li>• Adjust next steps based on needs and progress</li> <li>• Introduce additional professional learning as required</li> </ul>
<p><b><u>Institutionalization</u></b>  <i>How will anti-exclusion become a cultural norm?</i>          Focus on culture shift</p>	<ul style="list-style-type: none"> <li>• Department head leadership and department teamwork is a norm</li> <li>• Anti-exclusionary practice is a shared goal among staff</li> <li>• Monitoring is in place to track professional culture and student achievement</li> <li>• New or revised processes and supports are introduced as needed</li> </ul>

*Note.* The CIP uses the Change Path Model from Deszca, G., Ingols, C., & Cawsey, T. (2020).

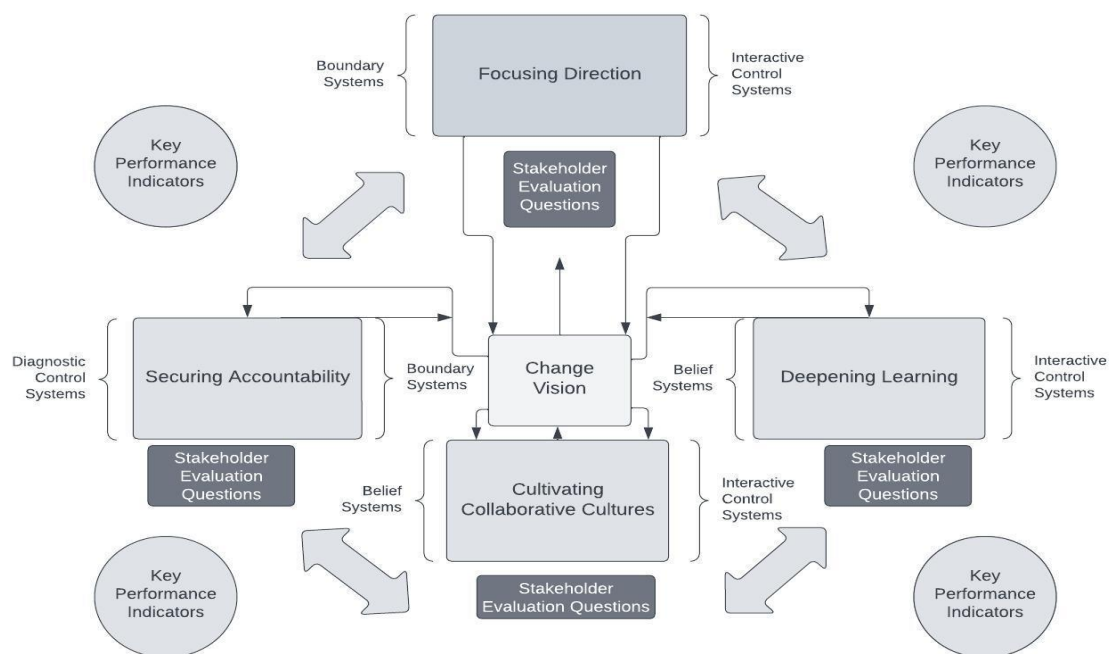
*Organizational change: An action-oriented toolkit* (4th ed). Sage.

### Appendix L: Knowledge Mobilization Framework

Change Path Model Communication Plan (Deszca et al., 2020)		Lavis et al.'s (2003) Framework for Knowledge Transfer				
		<i>Knowledge Transfer for Decision Makers</i>	<i>Knowledge Recipients</i>	<i>Knowledge Transfer Agents</i>	<i>Knowledge Transfer Methods</i>	<i>Knowledge Transfer Impacts</i>
<i>Pre-change</i>	<b>Awakening</b>	Principal solicits support from senior team	Superintendent, board equity lead	P/VP	Share achievement data, cultural analysis, draft plan	CIP is seen to align with district strategic priorities
<i>Developing the need for change</i>		Communicate leadership role and expectations of DH and DHT; support DHT in communicating to their departments	Primary: DHT and educators at CHS; secondary: students and parent community	P/VP communicates with all stakeholders; DHT focus on their departments	Sticky messages share problems and solutions through existing media (newsletters, staff meetings, etc.); student cogens; UDL engagement strategies	Stakeholder support centered on the moral imperative to change is in place. Staff motivation increases.
<i>Midstream change and milestone communication</i>	<b>Mobilization</b>	Inquiry Cycle introduced as necessary capacity building strategy; Implicit biases are explored with DHT and then staff	Primary: DHT and educators at CHS; secondary: students and parent community	P/VP communicates with all stakeholders; DHT focuses on departments and feeds back to the team. External consultant supports the work on implicit bias	DH Team meetings embed the inquiry cycle; information is fed back to at department and whole staff meetings; external consultant supports the exploration of implicit biases and impacts; positive change (student impact) is shared through email/meetings/ conversations	Effective inquiry cycle is underway and valued across departments; educators understand the impact of implicit biases on student outcomes and can articulate their complicity; student achievement increases due to shifts in practice
	<b>Acceleration</b>					
<i>Confirming and celebrating</i>	<b>Institutionalization</b>	P/VP monitor and share ongoing impacts with senior team, DHT, strategic communications team and staff  Students/parents are informed and give feedback	Collaborative, reciprocal communication between P/VP, DHT, and staff with a focus on achievement to date and next steps	P/VP communicates with all stakeholders; DHT members focuses on their departments and provide feedback to the DHT and P/VP team  Staff communicate impact to DH and P/VP	Ongoing use of inquiry cycle; department meetings, staff meetings, emails.  Revised sticky messages prepare staff for next steps	Staff understand and articulate the changes in culture and impact on students; next steps are understood; iterative planning is aligned with the change vision; celebration of collaborative success builds CTE

*Note.* The framework is adapted from Deszca et al.'s (2020) Change Path Model. It also uses core themes from Lavis et al.'s (2003) Framework for Knowledge Transfer.

## Appendix M: A Balanced Scorecard to Evaluate the Change Implementation Plan



*Note.* Adapted from Kaplan, R.S., & Norton, D.P. (1996). Using the balanced scorecard as a strategic management system. *Harvard Business Review*, 74(1), 76. The four quadrants are taken from Fullan, M. (2011). *Coherence: The right drivers in action for schools, districts and systems*. OPC/Corwin. The four levers of control are from Simons, R. (1995). Control in the age of empowerment. *Harvard Business Review*, 73 (2), 80-88.