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Developing French Language Learning Leadership

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Abstract

This Organizational Improvement Plan (OIP) analyzes the leadership shortage in a French language school board and the scarcity of qualified, skilled, and knowledgeable principals and vice principals willing to lead schools as learning organizations within minority contexts. French language principals have a unique responsibility for ensuring instructional excellence and learning, and they must lead in ways that transmit the mission and values of Francophone language and culture (Leurebourg, 2013). They must understand the cultural context of leading in minority environments and that organizational survival depends upon adaptability and the capacity to learn as an organization. Organizations should have a long-term strategic succession plan to attract, recruit, hire, and develop potential leaders. However, fewer individuals are willing to lead schools since the responsibilities are taxing, the remunerations are incongruent with the invested time, and the professional supports for leadership development are lacking. Drawing on multiple directions of inquiry to identify and analyze the problem of practice, this OIP proposes a change strategy inspired by Senge's (2006) *Learning Organization*, and Cawsey, Deszca and Ingols' (2016) *Change Path Model*. Change progress will be measured using a *Strategy Map* and a *Balanced Scorecard* (Kaplan & Norton, 2004) that fuses the criteria of Learning Organization Dimensions (Watkins & Marsick, 2017) throughout the various phases of the organizational change strategy.

Keywords: Principal shortage, leadership development for learning, French-language education.

Executive Summary

French school districts in Ontario are facing significant challenges regarding the recruitment of qualified, skilled, and experienced school principals. Searching for unique candidates with exceptional instructional leadership capacities who understand the dimensions of the French-language culture, and the educational mandate within a minority setting, is a difficult endeavor. This Organizational Improvement Plan (OIP) attempts to address this problem of practice (PoP) within the existing environmental context.

A substantial number of recent retirements, and the heightened impact of the teacher shortage on the French-language education system, are factors that contribute to the current situation, where school principal positions are vacant, and vice-principal positions are filled with unqualified, individuals with limited experience. Principals play an essential role in school improvement and have an indirect influence on student learning (Leithwood, 2013) therefore the issue will be addressed. This OIP uses a multiple lens, or a four-frame approach (Bolman & Deal, 2013) to examine the problem. Consequently, these structural, human resources, cultural and political perspectives provide entry points for the creation of solutions to confront this complex challenge. Beyond the immediate need to recruit and develop principal leaders, a secondary change phase exists in parallel to transform the district into a learning organization (Senge, 1996). The current leadership vacancy, alongside the proposed organizational change plan provides a window of opportunity to begin the gradual process of a cultural shift towards a learning organization which will surface first in structural and procedural organizational dimensions.

Functionalist and realist ontological approaches intertwine to inform the leadership perspectives that impel this OIP. Although organizations exist independently of the individual, the relationship between the individual and the organization influences change. Shaped by external factors, the organization can be considered a social construction, resulting from individual ideas, visions and beliefs (Burke, 2018). The duality and tension of these co-existing ontological viewpoints of organizational improvement are best supported by adaptive and transformational leadership approaches that influence proposed solutions, strategies and interventions to address the PoP. Leadership beliefs are shaped by identity, context, and power and my leadership positionality as Assistant Superintendent of Education, is a positive influence that will catalyze the district into a change to improve organizational outcomes.

Structured as an Organizational Improvement Plan (OIP), this project is viewed through Bolman and Deal's (2013) frames, and Nadler and Tushman's (1980) *Organizational Congruence Model*, both of which provide a pathway for potential solutions. Furthermore, this OIP is organized around the constructs of two change models: *The Change Path Model* (Cawsey et al., 2016), and the disciplines for building a *Learning Organization* (Senge, 1994). These tools situate my approach to this project through formal mechanisms that will consolidate the OIP's vision, limit obstacles, and privilege distributed and participative leadership. Adaptive and transformational leadership approaches have a kinship with the concepts of a learning organization (Senge, 1996), and they combine to provide the momentum that supports the anticipated change. Although the proposed change solutions are planned, the OIP considers the complexity of change (Stacy, 2003), and suggests flexible approaches to confront unpredictable circumstances. The recommended change initiatives are continuous and gradual in nature, and consider open systems theory of organizational change.

Finally, this document offers recommendations for action, steps required to mediate resistance, and how to communicate change to the organization and to individuals. Tools such as the *Strategy Map* (Kaplan & Norton, 2004) and an even more detailed *Balanced Scorecard* (Kaplan & Norton, 2004) provide clear pathways for individual and team objectives, and publicly highlight responsibilities. Ongoing measurements to monitor the change progress will incorporate a leadership development program evaluation, an iterative model (PDSA) and Watkins & Marsick's (1997) *Dimensions of the Learning Organization Questionnaire* (DLOQ) to guide improvements.

Potential solutions examined in this OIP include a rigorous recruitment and selections strategy, the creation of a succession plan, and a tiered leadership program for aspiring, emergent, vice principals and principals that is responsive to their needs and experiences. The proposed solutions integrate learning organization (LO) (Senge, 1996) concepts into their approaches, and provide an introduction of the model into the existing district culture. The distant aspiration is that the system and schools will gradually become learning organizations with the capacity to change and adapt to new environments and circumstances as its members, individually and collectively, learn their way to realizing this vision. A strong executive leadership approach intersected by adaptive, transformational, and distributed currents, influences this OIP and attempts to provide tools for the organization to examine methods to attract and develop learning leaders in a French language education district.

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Acronyms

ADFO	Association des directions des écoles de langue française de l’Ontario
CPM	Change Path Model
CR	Comité de recherche (Research Committee)
DLOQ	Dimensions of the Learning Organization Questionnaire
FD	French District
HR	Human Resources
IEL	Institute for Educational Leadership
LO	Learning Organization
LOM	Learning Organization Model
NTIP	New Teacher Induction Program
OIP	Organizational Improvement Plan
PAL	Politique d’aménagement linguistique
PBL	Problem Based Learning
PD	Professional Development
PDSA	Plan, Do, Study, Act
PoP	Problem of Practice
PQD / PQP	Programme de qualification à la direction (Principal’s Qualification Program)

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Chapter 1: Introduction and Problem

Successful leadership plays a significant and underestimated role in improving student learning and “leadership is second only to classroom instruction among all school-related factors that contribute to what students learn at school” (Leithwood, 2012, p. 5). Recruiting and selecting the best learning leadership candidates is the first step in improving organizational leadership capacity, which is crucial to the successful implementation of large-scale reform and increased student learning. Organizations must engage potential leaders, build their capacity, and retain a new cadre of system leaders. The contextual reality of a French language board in Ontario reveals that the district is unable to fill vacancies, and that there is a limited number of qualified individuals willing to work under current conditions. The gap between the preferred state of having an accessible workforce of promising candidates and the stark reality of vacant leadership positions in the board is the focus of the problem of practice (PoP) which drives this Organizational Improvement Plan (OIP).

The French language education system’s current challenge is examined through Bolman and Deal’s (2013) approach and Nadler and Tushman’s (1980) *Organizational Congruence Model* which provide multiple angles of interpretation to inform the proposed solutions. The combination of change models form the framework for organizational actions that will result in the desired outcome of securing skilled, knowledgeable and self-efficacious principals ready to embark upon the journey of creating Francophone schools as learning organizations.

Organizational Context: A Brief History of French Schools in Ontario

There is value in understanding the context of organizational change and its drivers, because organizations exist in temporal, cultural, and community circumstances. History, politics, culture,

and environment are contextual factors that influence change (Smith & Graetz, 2011), and leadership, central to organizational evolution, is also influenced by the dynamic relationship between these factors. This OIP draws upon a deterministic perspective, that assumes that organizations must respond to external environmental contexts (Cawsey, Deszca & Ingols, 2016). It provides an extensive analysis that highlights macro and micro discourses pertinent to the internal and external environment. It also situates the organization in a broader political, economic, and social setting, while identifying and analyzing change drivers in the strategic educational atmosphere. French language districts in Ontario exist in unique milieus and require distinctive leadership with the capacity to engage in positive, strategic, organizational change from a Francophone perspective.

The *Canadian Constitution Act* and specifically, the Canadian Charter of Rights and Freedoms (1982) provides the legal foundation for French language education systems in Canada. Section 23 of the Charter (1982) constitutionally guarantees minority language educational rights and the language of instruction, which permeate systemic governance policies and procedures. This political context, framed by a vivid history of suppression, resistance, and perseverance, reinforces a pride for Francophone education and culture that infiltrates leadership in French language school districts. In Francophone minority settings, where students living in Ontario exist in social and cultural environments dominated by English language and culture, schools are often the most significant link between families and French-speaking groups formed within English-speaking majority communities (Berger, 2017).

Francophone education plays a pivotal role in the unremitting struggle for equity, accessibility, and the resistance to assimilation (Berger, 2017). Within this critical context, the educational mission of high academic expectations centers upon the acquisition of advanced

language skills, and the development of complex values that shape students' identities (Dalley & Roy, 2008). French language school districts in collaboration with parents and community organizations, refer to the theoretical components of the *Politique d'Aménagement Linguistique* (Ontario Ministry of Education, 2004) (PAL) which helps schools increase their capacity to create learning and teaching conditions that ensure the protection, enhancement, and transmission of the French language and culture. The PAL demarcates language as a culturally expressive tool that provides access to a system of values and a way of interpreting the world (Berger, 2017). System and school leader decisions must consider the dimensions of French-language and culture as they establish a francophone environment conducive to the vitality and pluralism of the minority French-speaking community.

The school district in this study, hereafter referred to as the French District (FD) shares pieces of its history with all French-language schools in Ontario: one where Francophones were denied the right to French education with the implementation of Regulation 17 in 1912 (Ontario Ministry of Education, 2004). After decades of political and legal struggles, French school boards secured governance rights 1998, with the creation of 12 French-language school districts with culturally and linguistically responsive structures. Although the creation of the 10 Catholic and two Public French language school boards was a tremendous success, this gain also has drawbacks. Each board covers immense geographic territories which impacts financial expenditures associated with travel. Furthermore, there is limited access to French pedagogical material and human resources, and there are challenges for professional networking opportunities. Constantly in search of innovative solutions to these challenges, the boards remain inspired by their collective purpose. French language education has made progress in the political arena, securing governance rights and developing a mandate that describes their *raison*

d'être. Francophone schools are vehicles for language and culture and the Ontario Ministry of Education (2004) defines the mission:

to ensure the academic achievement of every student, to implement high-quality programs and services that are specific to the French speaking community, to create a dynamic and pluralistic Francophone environment reflective of Ontario's French-language community, to promote identity building, and to form significant partnerships between schools, families and the community. (p. 8)

Exceptional individuals are required to implement this complex mission that transcends instructional leadership capacities, to one where language, culture, and community partnerships are integral to the educational experience of Francophone students. This leadership must be cultivated and French language boards must improve learning leadership opportunities to increase student achievement in the linguistic and cultural context of French-language education.

The FD's Catholic vision permeates organizational values, purpose, and mission and is embodied in directions, operational procedures, and relationships; faith-based leadership is fundamental to the organization. It strives to create a learning organization where innovative pedagogy prepares Catholic graduates for the future. In addition to the emphasis on the Catholic vision, leadership focuses on achieving high academic expectations, and on developing a linguistic and cultural appreciation of French language (Gérin-Lajoie, 2006). Strategic planning revolves around five axes; personal and academic success, identity building through the transmission of French-language and culture, implementation of high-quality programs and services specific to the French speaking community, the creation of a dynamic and pluralistic Francophone environment and the development of partnerships between schools, families and

the community. Love, integrity, respect, excellence, and inclusivity are values that underpin the district's strategic pillars.

With approximately 10,000 elementary and secondary school students in 30 schools, with 30 principals and 32 vice-principals, the FD spans a geographic area of more than 30,000 km². The recent wave of retirements – eight principal retirements in 2018 and nine predicted retirements in 2019 – has left the system with at least 60% of school principal positions vacant over the next two years. Moreover, six principal positions were filled by vice-principals with less than one year of administrative experience, and 10 new vice-principals have been placed in schools, even though 50% of them have not acquired Part 1 of the Ontario Principal's Qualifications (PQP). The overwhelming number of inexperienced educational leaders compounds the effects of leadership vacancies in the board.

An emerging challenge is the unprecedented increasing student enrolment alongside declining supply of qualified French language teachers: There was a 53% decrease in teacher education program enrolment in 2014-2015, a 7.2% decrease in 2015-2016 (Ontario College of Teachers, 2017). High attrition rates compound the problem – French language program graduates reached 17% in 2015 while 20% of New Teacher Induction Program (NTIP) supported teachers in French-language boards leave the profession and 20% do not renew their license after five years (Ontario College of Teachers, 2017). Since principals are selected from this already-limited teacher pool, principal recruitment is strained.

A Functionalist and an Interpretivist Ontological Position

Educational research is influenced by philosophical foundations and particularly, ontological and epistemological assumptions. Together, these elements form a paradigm

orienting ideas, plans and thinking that is intricately linked to the researcher's work (Mack, 2010). The paradigm is foundational to the theoretical frameworks scholar practitioners use when constructing the meaning of reality and knowledge, and how they investigate relationships and behaviors. Similarly, leadership beliefs are shaped by identity, context, and power; such views affect the way people construct an understanding of leadership, as well as the way they act as leaders (Kezar & Lester, 2010). As the leader in this problem of practice, it is necessary to explicit my ontological and epistemological position, and to develop an awareness of its impact on the interpretation of the problem as well as the proposed solutions. Equally important, is the need to recognize personal assumptions that form the basis for a mental model about the way the world functions as this can become a blinder to changes in the environment, in processes, in relationships and, in values.

Counter to Burrell & Morgan's (1979) notion that ontological categories are mutually exclusive, it is beneficial to include objective and subjective elements to organizational analysis. My change philosophy is inspired by a functionalist (Smith & Graetz, 2011), realist approach (Burrell & Morgan, 1979), however, it intertwines interpretivist (Penuel, Coburn & Gallagher, 2013) elements especially when examining micro change (Kang, 2008). According to Marsick and Watkins (2003), a learning organization has two components; the people who comprise an organization, and the structures and culture created by the social institution of the organization. While organizations and individuals exist independently, their relationship influences change. The FD, shaped by external and internal factors is a social construction resulting from individual thoughts, viewpoints and attitudes (Burke, 2018). The co-existence of these ontological approaches to organizational change reflects the intricacy of organizational transformation that I will drive forward with a combination of adaptive (Heifetz, 1994; Heifetz, Grashow & Linsky,

2009; Northouse, 2016) and transformational leadership (Avolio, 1999; Bass & Avolio, 1994; Kouzes & Posner, 2012; Northouse, 2016) methods. Furthermore, a variation of change models invested in interpretivist (Burrell & Morgan, 1979) and complexity theories (Stacey, 2003) are lenses through which the problem is framed, and from which solutions are proposed. These approaches allow for multiple interpretations of events (Scotland, 2012), and consider the direct experience of people involved as the problem of practice is identified, and throughout change implementation (Mack, 2010).

Leaders should develop an “epistemological consciousness” (Capper & Green, 2013, p. 65), and an awareness that assumptions, beliefs, theories, and implementation strategies are elements of organizational change philosophy that influence leaders’ perceptions and their approach to change (Smith & Graetz, 2011). Educational leadership also requires a foundation in change theory, as it is a powerful tool when it informs education reform strategies (Evans, Thornton & Usinger, 2012; Fullan, 2006). It provides leadership with structures to interpret organizational transformation and suitable options to impact the process (Evans et al., 2012). Leithwood (2004) argues that effective leadership sets strong directions and influences members to move in those directions. Equipped with an epistemological conscience, an understanding of change theory and its application to my organizational context, I hope to inspire positive organizational change while supporting individuals throughout the process.

Leadership Position and Lens Statement: Adaptive and Transformational

Leadership

Organizations can exist in contradictory states (Smith & Graetz, 2011) and a multi-philosophy leadership approach recognizes these inconsistencies, and the complexity of change

which are catalysts for organizational learning. Beyond effective leadership skills, qualities and styles, leaders must interact productively to the multiple internal and external demands that influence the organization (Smith & Graetz, 2011). They must link planned organizational change to appropriate theories to facilitate effective and sustained improvement (Evans et al., 2012). Different organizational contexts require different leadership approaches, and to foster a learning organization in an educational institution situated in a dynamic environment, concepts from both transformational and adaptive leadership lenses frame my leadership position (Northouse, 2016).

As a Superintendent of Education, with multiple system portfolios, I collaborate with various teams who support the realization of system-wide objectives outlined in the Board Improvement Plan for Student Achievement (BIPSA). My immediate supervisor is the Director of Education, and in addition to focusing on large-scale improvements, I supervise six elementary schools and work directly with principals and vice-principals to increase school effectiveness linked to student well-being and achievement. From a micro perspective, the leadership vacancies in schools is an immediate concern, and from a systems perspective, this is symptomatic of a larger dilemma. It is for this reason that the OIP includes a second order change, one to gradually transform the FD into a learning organization that can anticipate problems and provide innovative solutions. Although my positional authority offers me the opportunity to lead from a top-down position, authoritarian legitimacy is incongruent with my moral imperative (Fullan, 2003). My privileged leadership positionality situated at the top of our organization, affords me the opportunity to bring about change, however, because leadership is about influence (Northouse, 2016), I assume leadership to produce meaningful organizational improvements that supersede mandated initiatives. Using strategic leadership for learning when

working with system teams and with principals, I intentionally promote inquiry and dialogue, encourage collaboration and team learning, create continuous learning opportunities, and empower people toward a collective vision. As a transformational leader, my core values, manifested in my actions, demonstrate that I embody organizational values (Bass & Avolio, 1994) of: (a) love; (b) equity; (c) excellence; (d) integrity; and (e) respect. These values are transferred into an intentionally designed learning architecture that promote a self-perpetuating learning organization culture.

Although there is conceptual confusion surrounding the notion of a learning organization (Watkins, 2017), this OIP focuses on a definition that converges on several factors mentioned hereafter. Continuous learning and improvement are significant themes, and Garvin (1993) and Lewis (2002) propose the importance of creation, acquisition, and transfer of knowledge. Senge (2006) and Moilanen (2005) mention individual, team, and organizational learning anchored in concrete values, visions, and goals, as well as change and transformation. Armstrong and Foley (2003) refer to the appropriate processes and cultural and structural facets that support learning and development. In line with these themes, the OIP includes the understanding that a learning organization incorporates dimensions of leadership, strategy, participative policymaking, continuous learning, dialogue and inquiry, team learning, empowerment, and facilitating processes and structures (Garvin, 1993; Gephart, Marsick, Van Buren, Spiro, & Senge, 1996; Griego, Geroy & Wright, 2000; Holt, Love & Li, 2000).

This OIP considers a learning organization as one that constantly grows its capacity to learn, and changes rapidly to meet the challenges of an unpredictable environment. There are two kinds of organizational learning from experience (March, 1991). From one perspective,

organizations make investments in exploration to generate new knowledge. On the other hand, they invest in exploiting proven theories, strategies, and technologies. The OIP proposes the creation of a culture that promotes an organization that learns from experiences of exploration and exploitation. Furthermore, Argyris and Schön's cognitive view (1978, 1996) blends individual and organizational learning. They define organizational learning as what occurs when individuals, acting as agents of the organization, make meaning of experiences by detecting and correcting errors, adding to organizational wisdom. Research has identified a correlation between the presence of the dimensions of a learning organization and knowledge performance (Watkins & Dirani, 2013) and these will be integrated into the metrics for monitoring the emergence of a learning organization in the FD.

In alignment with Meyer's (1982) findings, the proposed change plan integrates two types of change reflective of organizational learning. The first order change can be viewed as developing organizational resilience as it proposes immediate solutions to address the FD's leadership shortage, and to return to business as usual. The second order change focuses on the creation of a learning organization which stems from retaining new practices and knowledge generated by adapting to the unpredicted problem. Changes in organizational vision, ideology, and structure will enable a deeper transformation, or second order change. The underlying theory of organizational learning as adapting to experiences is implicit in the terms resilience and retention. However, the significance of a cultural perspective which includes the vision, or ideology and structure that drive transformational changes, are included in the OIP's change plan. In sum, experiential and cultural perspectives of organizational learning are incorporated into the conceptualization of this OIP's definition of an organizational learning.

A learning organization requires coordinated organizational learning processes and infrastructures that promote continuous realignments between the organization and its environment. Schools must be reconceptualised to embrace this concept which involves a revitalisation of school leadership for learning that orients leaders and organizational members into becoming high-quality knowledge workers. Organizational structures and processes will evolve to create an adaptive organization that can thrive in a changing external atmosphere. Designing schools as learning organizations requires a leadership focus on developing and sharing a vision centred on student learning, creating and supporting continuous learning opportunities for all staff, promoting team learning and collaboration, establishing a culture of innovation and exploration, embedding systems for collecting and exchanging knowledge and learning, learning from and with the external environment and the extended learning systems, and modelling and cultivating learning leadership (Kools & Stoll, 2016). Beyond the structural level, the change plan will include a concentration on the FD's culture as it influences organizational vision, values, history, memory, objectives, vision and outcomes. Schein (1996) argued that the idea of organizational learning refocuses on culture as a means of changing the capacity of the organization to grow. Organizations are complex systems composed of sub-systems and that the capacity to maintain itself and grow depends upon shared assumptions that underlie these systems and live beyond the individuals that populate them. Schein (1996) continued, "Culture is both the consequence of the organization's prior experience and learning, and the basis for its continuing capacity to learn" (p. 5).

Founded on Senge's (2006) work on learning organizations, the district's long-term objective is to create an organization that continuously learns, adapts, and changes. This macro change will result in a district where individuals materialize a common vision focused on

improving student learning, where innovative thinking is cultivated, and where shared objectives consider systems thinking. Systems thinking (Senge, 2006) highlights the interrelationship between the disciplines, and focuses upon the process of their interactions rather than the sum of their parts. The organizational learning perspective, drawn from Argyris and Schön's (1978) double loop learning, extends beyond detecting and correcting errors, to engaging organizational members in questioning and modifying existing norms, procedures, and objectives to change the organizational knowledge base (Dodgson, 1993). These deep changes can be supported when leaders combine adaptive and transformational leadership approaches.

The intentional integration of transformational leadership theory supports the collective vision to create a learning organization because transformational leadership can promote organizational innovation (Northouse, 2016). Working with various teams across the system, I hope to facilitate intellectual stimulation (Bass & Avolio, 1994), another feature of transformational leadership, as we analyze and reconsider existing administrative structures, information systems, human resources practices, and leadership (Greiner & Cummings, 2009) to develop new possibilities that move the organization closer to the desired future state. From an organizational design perspective, I will purposefully design learning into work, devise structures that emphasize teamwork, collaboration, and networking across organizational boundaries. The work design will leverage technology, engage in approaches such as design thinking, and action research, but regardless of the form, it will promote information sharing and the development of new skills, knowledge and competencies, consistent with the learning organization. This will be facilitated by leadership development programs, mentoring, coaching and other professional development opportunities geared to individual and professional needs.

Transformational leadership is viewed as a demanding approach as the leader must deliver the four behavioural components of idealized influence, inspirational motivation, intellectual stimulation, and individualized influence. The leader must also be tolerant to follower's mistakes (Bass, 1996) and open to new ideas, however, this model is naturally congruent with my high-energy personality and leadership style. Transformational leadership is critiqued for the high expectations it places on its leaders nevertheless, this is a driving force that pushes me beyond my expected capacities where I can model high performance (Smith, Montagno, Kuzmenko, 2004). Drawing strength from the desire to lead others, I find it motivational to accentuate the needs, achievements and growth of followers. Finally, some critics find that transformational leadership lacks conceptual clarity (Northouse, 2016), is difficult to measure, and views leadership personality as key rather than something that can be learned. In contrast to these perspectives, Kouzes and Posner (2012) explain that leadership can be learned and they outline transformational leadership capabilities that can lead to productive change.

Both adaptive and transformational leadership models adapt a heroic approach to leadership, where the focus is on one leader who moves followers to accomplish exceptional results (Northouse, 2016). Even though change will be centrally initiated, the success of the change depends on the implication of other organizational members. Abandoning a self-centered desire from power and recognition, my behaviour will endorse idealized influence (Bass & Avolio, 1994) in which I enthusiastically "Model the Way" (Kouzes & Posner, 2012) as I work alongside team members to realize our common vision. I will instil pride in organizational members by providing them with forums and challenges that initiate intellectual stimulation (Bass & Avolio, 1994), creative problem-solving, empower them to take risks, and innovate. Throughout this process, I will optimistically maintain a focus on the vision, provide members

with individualized consideration (Bass & Avolio, 1994), and encouragement through collaborative exchanges designed to foster motivation and continual learning. Building behavioural integrity is a way in which transformational leadership can support successful change (Simons, 2002). When my behaviour models risk taking and reflection required for learning, this provides a psychological focal point for organizational members that demonstrates desired actions and reactions to change (Holten & Brenner, 2013). Supporting organizational members' ability to acquire and develop new knowledge, to solve problems and to address opportunities is essential to surviving in today's complex atmosphere and transformational leadership can provide the framework to manoeuvre in a changing context (Holten & Brenner, 2013).

Distributed leadership encourages members' involvement in problem solving and idea creation (Northouse, 2016) and this approach will be intertwined with adaptive and transformational leadership. It stimulates organizational learning and from a holistic perspective (Gronn, 2002), which hinges on the interdependence of leaders' work and their dynamic, multi-directional, social processes which incite individual and organizational learning (Leithwood, 2004; Manz & Sims, 1980;). When tackling challenges, I will foster distributed leadership through teamwork as it provides greater opportunity for mutual learning, increases job embedded leadership development experiences, and cultivates the ability to anticipate and respond to the demands of the organization's environment (Leithwood, 2004). Distributed leadership can complement transformational leadership and I will exploit this approach when I encourage members to challenge their assumptions, and motivate them to surpass their capacities by taking lead roles in projects, meetings and initiatives. Collaborating with members to problem solve, I will draw on their expertise to innovate towards our common organizational goal.

Avolio (1999) illustrates that transformational leaders are concerned with improving the performance of others, and developing them to their fullest potential. Throughout the change process, I will be engaged as a co-learner in multiple contexts which highlights my appreciation for intellectual stimulation. I will question, coach, and provide feedback to empower others to meet higher standards, which will impact organizational learning. My personal leadership resources and specifically, the social and psychological elements (Leithwood, 2013), help me recognize and adapt to the needs and motives of members, thus providing individualized consideration, which has elements in common with adaptive leadership.

Adaptive leadership helps identify organizational challenges, promotes learning and responsiveness to change (Northouse, 2016). Providing leadership that mobilizes people to confront challenges and change, adaptive leadership affords organizational members the space and opportunity to learn new strategies and skills while exploring and changing their values. Our teams will create safe learning opportunities framed by collaborative norms around innovation for example; think tanks, coaching, self-directed study, cross-department meeting, and collaborative inquiry, to mobilize, motivate, organize, orient, and focus the attention of others (Heifetz, 1994). When people can adapt on an individual level, it cultivates their ability to thrive in new circumstances, which can be transferred to the organizational setting, and this is congruent with the development of a learning organization. Fostering behaviours and structures that encourage learning, creativity, and adaptation in complex organizational systems, adaptive leadership facilitates change in social systems, such as educational organizations.

For Heifetz, Grashow and Linsky (2009), transferring the theoretical notion of adaptive leadership into practice necessitates facilitating change that enables the capacity to flourish,

which requires a leadership that can balance multiple stakeholder priorities, and understand their perspectives. The *Adaptive Leadership Model* (Northouse, 2016, p. 261) illustrates the process where the leader analyzes the challenge (technical, adaptive, or both types), and subsequently accompanies members through the identification of adaptive challenges. The collaborative process takes place in a safe zone which Heifetz & Linsky (2002), label a “holding environment” (p.113) and these contexts are where I will guide partners with direction, protection, orientation, conflict management and productive norms. Essentially, I will orchestrate the tension and the pressure organizational members experience, thus pushing them into a disequilibrium which forces an adaptation. Within this inclusive setting, the work of identifying the challenge is placed into the hands of the members as the leader facilitates. The iterative process of observing, interpreting and designing interventions, is constructivist, requiring the leader to think experimentally, interpret situations, and implement solutions.

The adaptive leadership approach is not without limitations, and an awareness of these challenges is essential to finding solutions to the challenges this model presents. The change leader must be able to accurately diagnose problem as adaptive or technical in nature, and this can be supported by using frameworks. A technical challenge is easy to identify, requires small changes within known boundaries, and has quick solutions that can be implemented immediately. While technical problems may be very complex and critically important, they can be resolved through the application of authoritative expertise and through the organization’s current structures and procedures. Adaptive challenges are difficult to identify, require changes in values, beliefs and approaches to work. This leadership style requires the leader to develop the ability to constantly experiment and change across boundaries. Making progress requires going beyond any authoritative expertise to mobilize discovery, shedding certain entrenched ways, tolerating

losses and generating the capacity to thrive anew. Organizational members will be provided with coaching and training in order understand and apply this model.

Transformational and adaptive leadership theories form the lens for my leadership practices and complement my organizational positionality. They are the framework from which I hope to mobilize change that will equip the organization with strong principals and prepare future generations of leaders for positions that will build a learning organization.

Leadership Problem of Practice: Leadership Crisis in a French District

The problem of practice driving this OIP focuses upon principal and vice-principal shortages in a French-language school district in Ontario. Williams (2001) predicted that 71.7% of Ontario elementary principals and 74.2 % of secondary principals will retire by 2007. Furthermore, an Institute for Educational Leadership (IEL) study of the Ontario Ministry of Education's 2005-2006 demographic data reported that 37% of elementary school principals and almost half of secondary principals in both French and English systems would be eligible to retire by 2008 (Learning Partnership, 2008). A 2001 study commissioned by the Ontario Principal's Council predicted that by 2009, more than 80% of the province's elementary and secondary schools will be eligible for retirement (Williams, 2001). In 1999, the Canadian Association of Principals determined that the projected administrator shortage extended beyond Ontario, and was country-wide. By 2003, a Leadership Crisis Study indicated the shortage predicted in 1999 had become a reality (Canadian Association of Principals, 2003). These reports accurately reflect our current organizational reality. The district's schools are situated within minority language community contexts as unqualified new administrators are appointed to

schools, retired principals are recruited back to work, and schools begin their academic year without leaders because of administrative vacancies.

Specific to the French language educational context, almost 50% of French language principals were eligible for retirement beginning in 2018 (IEL, 2008), while 60% of elementary English district vice-principals and 50% of secondary English district school principals were eligible for retirement in 2018. This shortage has impacted our board significantly, leaving at least two principal positions vacant, five unqualified individuals in vice-principal positions and 22 principals with under one year of vice-principal experience leading schools. These figures are concerning as principals play a pivotal role in improving school and student performance, and they can change school practices that lead to better learning and teaching outcomes (Schleicher, 2012).

School leadership concerns are a global education policy priority because effective school leadership is essential to improve the efficiency and equity of schooling (Pont, Nusche & Moorman, 2008). Therefore, the training and development of future leaders is a significant issue as many nations devise strategies and training programs emphasizing the role of leaders in raising educational achievement (Lumby, Crow, & Pashiardis, 2008). The limited size of the principal workforce alongside the increasingly unattractive and demanding workload raises concerns for the future of the profession. Additionally, the ageing population of current principals, the increase in retirements, and the widespread shortage of qualified candidates prepared to replace them, has left unfilled leadership positions in schools, and resulted in a scarcity of adequately prepared administrators (Educational Research Service, 1999, 2000, Normore, 2004).

Since school leadership plays a key role in improving school outcomes by influencing the motivations and capacities of teachers, as well as the environment and climate within which they work (Townsend, 2007), the organization must ensure that qualified principals and vice-principals fill these roles, and are prepared to meet the challenges of the constantly evolving educational landscape. As Hallinger and Heck (1998) argue, principals have an indirect but tangible influence on learning outcomes, and have the potential to contribute to solving organizational dilemmas in their immediate, or school sphere, and beyond, into the system. The existing model of educational managerialism must be questioned and options such as Senge's (1990) organizational learning, where leaders are responsible for learning, could provide a promising alternative.

The problem of practice is relevant to my professional interests because as a member of the executive committee, it relates directly to my organization and my sphere of influence. As Assistant-Superintendent of Education, I share responsibility for the Educational Leadership Strategy portfolio. My role allows me to actively engage with the organizational challenge, to contribute to the creation of knowledge, and to address the problem in productive ways.

Leadership succession is a concern, but current conditions create a more distressing issue of addressing the unfilled positions in our schools and the high number of unprepared principals and vice-principals entering leadership positions in schools. Since organizational problems are complex and not limited to single propositions about causes and consequences (Archbald, 2008), what combination of strategies might help the organization address the scarcity of prepared principals in Francophone school districts who can establish a learning culture and facilitate organizational learning? A multi-angled inquiry will offer greater depth to the analysis of the problem, facilitate the creation of various solutions, and provide a critical reflection.

Framing the Problem of Practice

There are several frameworks relevant to providing perspectives on the problem of practice that can be used to offer a more accurate diagnosis of the issue. Analyzing problems through multiple frameworks forces leaders beyond mechanical approaches for understanding problems and offers an inquiry-based framework that encourages the generation of new solutions. Mental models influence the way the world is interpreted, and limit the ways individuals think and act (Senge, 1990) therefore, employing Bolman and Deal's (2013) framework encourages an appreciation of different paradigms to generate new insights and actionable options. Bolman and Deal (2013), discuss the complexity of ill structured problems. They propose using four frames: (a) structural; (b) political; (c) human resources; and (d) symbolic to analyze problems and expand managerial thinking in relation to change. Re-framing exposes the models through which we interpret experiences and helps diagnose complex problems, and produce alternative approaches to challenging circumstances. Bolman and Deal's (2013) approach stems from a social constructivist vantage point and aligns with my ontological position, which views reality as socially constructed by individuals. This invokes multiple meanings as reality must be understood in complex wholes that are bound with historical, socio-economic, and cultural contexts in which they are embedded.

Organizational Theory: Bolman and Deal's (2013) 4 Frames Analysis

Bolman and Deal's (2013) structural, human relations and symbolic frames of analysis provide lenses to expand change management thinking. From a structural perspective, the PoP uncovers organizational inefficiency: (a) unfilled positions of responsibility; (b) the absence of a formal leadership succession plan; (c) a limited number of candidates best suited to assume

school leadership responsibilities including the ability to facilitate optimal conditions for the realization of a learning organization. Leurebourg's (2013) study reveals that principals in Francophone schools lead the instructional program, manage schools, and are responsible for promoting French language and culture however, their absence puts these responsibilities and the future of Francophone education in Ontario at risk. Furthermore, research demonstrates that the principalship is not considered an attractive career with its increased workload, stress and limited financial return (Darling-Hammond, Lapointe, Meyerson, Orr, & Cohen, 2007, Pollock, 2018). Following the Weberian influence of the structural model (Bolman & Deal, 2013), it is logical to consider structural misalignment to provide new models of distributed educational leadership. Because potential candidates feel unprepared for the position (Darling-Hammond et al., 2007), we must cultivate deep learning, collaborative culture, and support professional development. While ensuring a vertical and lateral coordination of work, the district should concentrate upon organizational performance while motivating, developing and retaining expertise in a way that maximizes productivity (Mabey, 2003). From a socio-constructivist perspective, learning is shaped by the context in which it is situated and is actively constructed through social negotiation with others and consequently, one must consider the delivery models of leadership development programs.

The human resources frame recognizes that ideas, talent, energy and motivation are necessities for organizational success (Bolman & Deal, 2013). The absence of an intentional human resources recruitment and development strategy contributes to the current condition and therefore, the FD must attract and develop human capital, and invest in talented employees. Autonomy, mastery and purpose are motivational drivers linked to self-actualization (Pink, 2011) and the extent to which principal positions offer meaningful opportunities for personal and

professional growth within the organization should be contemplated. Solutions must be tied to the French-language education mandate, which is embedded in Francophone history and culture. The co-dependence of human and organizational needs is central to the human resources frame and this balance must be maintained.

The district's interview process yielded 12 candidates with only three people promoted to principal's positions. Interview forms and comments from the hiring committee demonstrate a lack of foundational knowledge and instructional leadership skills amongst the vice-principals currently working in the system. The human resources frame provides interventions to appraise and reward performance, ensuring that people develop their careers and sustain their wellness. Action-centered, continuous learning will be built into vice-principal's workplace where they can take risks and learn from mistakes (Mabey, 2003) while obtaining feedback from principals, who assume the role of mentor. The FD will provide safe collaborative learning environments, job-embedded mentoring, and coaching that offers individuals opportunities conducive to their professional development. Leadership is a subtle process of mutual influence that should produce collaborative efforts, distributed decision-making and learning.

The political lens exposes macro factors impacting the PoP, and uncovers how scarce resources lead to conflict and competition fueled by individuals and groups with enduring differences (Bolman & Deal, 2013). Externally, French-language boards compete between each other for potential candidates by offering more attractive incentives. Moreover, an increase in demand for French-Immersion programs in English boards has drawn our candidates away from leadership positions as English boards offer more alluring employment packages, including a higher pay scale.

Finally, the symbolic lens is tied to the PAL's *construction identitaire*, a cultural component entrenched in French-language education. Organizations are cultures propelled by rituals, ceremonies and stories (Bolman & Deal, 2013) and as a French Catholic institution, language and faith are tied to that distinctive symbolism. Leurebourg's study (2013) highlights the unique and important role French language principals play in the promotion and protection of Francophone language and of culture in schools, which is significantly different than the roles their English counterparts enact in their educational contexts. This generation of Franco-Ontarian educational leaders may be disconnected from this mission, and may lack an understanding of their importance to the history of our community, which is intricately tied to the organization. As a symbolic leader, I must create a meaningful workplace, respect cultural rules and practices, lead by example, use symbols to capture attention, communicate a vision, tell stories, and use history to inspire and engage organizational members (Bolman & Deal, 2013).

Educational Context: PESTE Analysis

Drawing on an interpretivist paradigm, Penuel, Coburn & Gallagher (2013) encourage framing the problem of practice from multiple stakeholder's perspectives because the construction of reality is a social, interactive process. *Reframing* is the ability to switch attention across multiple models and paradigms to generate new insights and actionable options (Archibald, 2008). Problems are increasingly complex, and the interpretation of a problem from various angles allows sources to surface, and impacts the course of action to address the PoP. The context of organizational change cannot be underestimated therefore, in addition to Bolman & Deal's (2013) approach, a PESTE – political, economic, social, technological, and ecological/environmental – analysis highlights macro and micro discourses pertinent to the

internal and external environment and situates the PoP in a broader political, economic, and social setting. Both models help identify and investigate educational change drivers.

The need for change is influenced by dominant ideological perspectives through which the PoP is viewed. On an immediate level, the senior executive team and the Board of Trustees have voiced concerns about the leadership crisis. When stakeholders' awareness of the problem of practice surfaces, it can reinforce the problem's legitimacy (Story & Maughan, 2015) and instigate a reaction. The change initiative contains elements of conservatism because it originates from top hierarchical levels, and it views leadership as an instrument to uphold traditional Francophone culture and Catholic values. However, it incorporates liberal interests because it envisions a future where leaders transform education practices and establish learning organizations. Although change is centrally driven, sustainability and growth are dependent upon a decentralization of authority. Developing current and future leaders can shape the liberal organizational culture we hope to establish where transformational leaders use distributed leadership to create organizations that innovate and experiment, generate new programs, evaluate their effectiveness, and share this information with the public to make decisions (Raven, 2003).

The broader provincial political arena contributes to the reluctance of candidates to pursue school leadership positions. Ongoing reports of underperforming schools, an awareness of the growing demands on principals, and media coverage of principal shortages have brought issues of administrative recruitment, training and support to the attention of policymakers (Darling-Hammond & al., 2007). The neo-liberal political framework endorses national and international standardized testing which hierarchically locates countries on an intellectual schema, linking education to the global market economy. Legislation influences the Ontario

Principal's College, and requires principal candidates to acquire a Master's degree or two specialist certifications to access qualification courses. The increase in accreditation requirements limits the number of potential candidates, especially considering the recently extended, mandatory 2-year teacher's college certification program. Frequent changes in the curriculum, Ministerial initiatives, and increased responsibilities are deterrents to potential leadership candidates.

Economically, school budgets are impacted by central government funding formulas and this influences the strategic direction of schools. As well, principals' salaries are only slightly higher than those of experienced teachers, limiting the appeal of the profession. Socio-cultural factors that impact the desirability of educational leadership include cultural expectations, norms, shared beliefs, population growth, and age distribution. The demographic shift alters student and teacher roles and needs, placing further stress on the system (Darling-Hammond & al., 2007). Filtering the PoP through frameworks facilitates the collection and organization of information that exposes situational realities.

Lines of Inquiry Emerging from the Problem of Practice

Interactions with various organizational stakeholders and departments allows for a deeper understanding of the unfolding issues, and provokes alternative lines of inquiry around the problem. It was assumed that the Human Resources (HR) department developed an action plan in response to the multiple warnings of the predicted imminent principal shortage (Darling-Hammond & al., 2007; Hansford, & Ehrich, 2006; Williams, 2003). From the senior executive team's lens of inquiry, the leadership shortage should be nonexistent and therefore, the first point of inquiry was to scrutinize the recruitment, retention and succession plans. How should timing,

incentives, and strategies be structured to respond to the changing needs of (a) the organization; (b) potential candidates; (c) current employees? How does the organization recruit the right people, prepare them comprehensively, and support them as they lead schools? What is the retention rate of principals and vice principals? What are the reasons for their departure? What supports are in place for principals and or vice principals? Do mentorship, coaching, or professional development opportunities exist in the organization? If so, are they effective? How can organizations grow their capacity to learn continuously? How can they change more rapidly to meet the challenges of an uncertain and unpredictable environment?

When comparing French and English language school board principal positions in Ontario, distinctions emerge that lead to the following questions: What constitutes an effective principal profile? What is the content of employment contracts? How do pay scales, benefit packages, and vacation times differ from board to board? What existing leadership development programs exist, and what are their design? What are the goals and the purposes of the organization's leadership development program? Do they align with the recruitment and retention plans? Do they provide a fluid transition to principal roles? How many people participate in the leadership development program and obtain a principal or a vice principal position? Would program participants find that the leadership development strategy prepared them for the role? Why do employees engage in leadership development programs? Does the program provide opportunities for leaders at all organizational levels and in various career stages to develop?

These questions can provide rich qualitative and quantitative data that will unearth a clearer understanding of the problem of practice: Why is there a principal shortage in French

language boards in Ontario? Perceptual information such as open-ended survey questions, and unstructured interviews from current school board teachers, can provide avenues for solutions to this challenge. An inquiry into the factors that positively or negatively influence potential candidates from pursuing a career in a position of responsibility is paramount. Candidates in this context must be bilingual, Catholic, and highly qualified professionals. This unique profile may impact the problem of practice in terms of available candidates. Questions addressing interest, required qualifications, motivation, and prohibiting factors should also surface during this phase.

The role of the principal has greatly expanded and evolved (Cardno & Fitzgerald, 2005; Pollock, Wang, & Hauseman, 2014), which has led an increase in job complexity and workload (Brauckmann, & Pashiardis, 2012; Day, Harris, & Hadfield, 2001). This reality connects to evidence that suggests that many principals struggle with work-life balance (Pollock & Wang, 2019; The Institute for Educational Leadership, 2008), and are experiencing substantial degrees of mental health issues and stress (Dewa, 2009). Stakeholder expectations for school leaders demand higher academic results and performance standards (Brauckmann, & Pashiardis, 2012), while preparing students for an unknown future in a globalized world. These issues surrounding the PoP must be examined to develop a clear understanding of the challenges that exacerbate the situation. School effectiveness research demonstrates that excellent leadership is a main factor in high performing schools (Bush & Jackson, 2002), and the absence of French language leadership in minority contexts will have a significant impact on student learning, and on the preservation and promotion of French language and culture.

Leadership Focused Vision for Change

The leadership focused vision for change embraces a future with qualified and proficient principal and vice principal teams with potential and motivation to create Francophone learning organizations. Presently, few individuals are assuming leadership positions, some schools are functioning in the absence of formal leaders, and other schools are staffed with inexperienced principals and vice-principals. This leads to a disparity in capacities, and individuals lacking a sense of self-efficacy and knowledge to lead learning organizations. An underlying, macro change initiative will gradually integrate into the first change phase: Multiple retirements will provide a window for organizational culture to shift with the new generation of leaders, and this transformation will be completed during a second change period where the objective is to convert the FD into a learning organization. The issue of educational leadership demand and supply reflects several challenges including: (a) how to expand the number of qualified leaders; (b) how to address shortages; (c) how to recruit leaders; (d) how to distribute leaders equitably across the system; (e) how to retain them.

The Change Path Model and the Learning Organization as Conceptual Frameworks for Leading Change

Before delving into proposed conceptual frameworks for change, theoretical underpinnings must be exposed to uncover the underlying paradigms that influence the OIP. Scholar practitioners must be conscientious of the frameworks through which they interpret the social world, and of the assumptions upon which those frameworks are constructed. The angle taken to investigate the PoP and to propose change, rests on nominalist ontological assumptions. It assumes a critical paradigm, viewing reality as subjective with multiple realities individually

constructed by the interaction between the consciousness and the world. The conflict paradigm understands reality as shaped by values, and manipulated by power relations (Scotland, 2012) and these elements must be considered when planning and implementing change. The FD's predicament is evident, and there is a need to realize change through a recursive relationship between theory, data, research, questions, and interpretations (Scotland, 2012).

Distinctive change approaches can be applied to different groups and circumstances and this OIP recommends the *Change Path Model* (CPM) (Cawsey, Deszca & Ingols, 2016) to address the problem of practice. The framework maintains that leaders must be aware of changing conditions, able to learn, and flexible enough to adapt their understandings and alter interventions as needed, which can be supported by an adaptive leadership approach. The CPM's functionalist framework aligns with my ontological assumptions as it is situated in stability and incremental change. Despite criticisms that traditional approaches emphasize pragmatic and superficial change (Tsoukas & Chia, 2001), it is possible to use existing structures and routines to promote small change. Organizational change is paradoxical and although it may be planned, its anticipated direction, and results, rarely materialize (Burke, 2018).

Senge's (1990) *Learning Organization Model* (LOM) is incorporated into the change initiative as the framework proposes incremental change and views people as change agents who shape their reality to create the future. *Personal Mastery* is a foundation of Senge's (1990) change framework and it focuses on the importance of developing individual learning to influence organizational learning. To escape the limitations of our own thinking, mental models must be exposed to view the world and the organizational problem from a different perspective. The significance of creating a shared vision, collaborative team involvement, and the use of data

to uncover an accurate depiction of reality, are considered important change levers in the strategy to actualize the vision. Senge's (1990) *Building Shared Vision* draws on collaborative leadership practices as it aims to collectively create a genuinely shared vision of the desired future, enlisting commitment and enrollment rather than compliance. *Team Learning*, evokes reciprocal learning where extraordinary results occur with individual learning. The five disciplines developed together, are integrated and create a body of theory and practice to lead the change initiative. This OIP's conceptual framework for leading change incorporates Creswell et al.'s (2016) CPM and Senge's (1990) LOM which focus on increasing organizational learning capacity to improve organizational performance, and are driven by adaptive and transformational leadership.

Analyzing the problem from a structural position (Bolman & Deal, 2013), the organizational design is inadequate as it has limited structures and systems for leadership recruitment. The absence of a principal candidate bank and a succession plan compound the issue. The assumption is that the absence of formal leadership in schools will negatively impact organizational performance since there is increased efficiency and performance through specialization and training. With principals engaging in multiple, complex roles that require them to create learning environments for student achievement, they must have specialized training to prepare them in their roles. In addition to supporting people, Bolman & Deal (2013) maintain that leaders should invest in the development of human capital for long-term results. There must be a focus on changing people through training and education, and although the organization currently builds teacher capacity, it lacks supportive structures for principal learning. Since the district is becoming a learning organization, it must facilitate learning for its members who will help it evolve to will ensure organizational survival (Pedler, Boydell, & Burgoyne, 1989). As well, the organization will provide safe collaborative learning environments, job-embedded

mentoring, and coaching that offers individuals opportunities conducive to their professional development. Elements drawn from the human resources frame such as: (a) recruitment; (b) motivation; (c) development; and (d) retention of expertise, can improve organizational performance (Mabey, 2003). The organization will structure its approach to developing individuals around its mission to create innovative learners founded in the concepts of Senge's (1990) learning organization.

The change initiative's immediate priority is to fill unoccupied principal positions with qualified, skilled individuals with potential to facilitate the creation of a learning organization. The school district will provide training to those in new positions with administrative or managerial information such as policies, procedures, legal obligations, federation guidelines, finances, teacher evaluations, and accommodations. It will then move into building and developing school improvement plans, interpreting data, developing monitoring tools and creating organizational learning conditions. Superintendents will develop this first phase of training, and it will parallel individualized support offered by experienced principals. A third layer of support involves a team of retired or experienced principals as mentors and coaches, who are assigned to different schools to check in regularly, and provide guidance. Principal learning teams, structured around instructional leadership, will assist in the creation of the future vision: The development of strong leaders who intentionally create the conditions for learning. This strategy will reinforce newly appointed principal capacity, and attenuate board trustee concerns about their preparedness.

The future state will improve the situation for other social and organizational actors because a learning organization is "an organization where people continually expand their

capacity to create the results they truly desire, where new and expansive patterns of thinking are nurtured, where collective aspiration is set free, and where people are continuously learning to see the whole together” (Senge, 1990, p. 3). The desired state will be constructed in collaboration with various organizational members, and prepare individuals and the organization with the capacity to adapt to the changing world that surrounds and influences the direction of education. The co-dependence of human and organizational needs is central to the human resources frame, and this balance must be maintained. There will be a focus on changing people through training and education, and although the organization currently builds teacher capacity, it lacks supportive structures for principal learning. Since the district is evolving into a learning organization, it will facilitate learning for its members who will help it change to ensure organizational survival (Pedler, Boydell, & Burgoyne, 1989). Elements drawn from the human resources frame such as: (a) recruitment; (b) motivation; (c) development; and (d) retention of expertise, can improve organizational performance (Mabey, 2003). The FD will structure its approach to developing individuals around its mission, and create innovative learners founded in the concepts of Senge’s (1990) learning organization.

Today’s principals face more complex expectations influenced by diverse student and teacher populations, external and internal political and social interests, and stakeholder priorities. They balance competing needs and priorities in complicated environments while maintaining a focus on learning and contributing to school change and improvement. The projected change is designed to provide schools with collaborative principal learning teams that can orchestrate the conditions of a learning organization to ultimately enhance student outcomes. Learning organizations are facilitated by transformative and adaptive leadership styles as they can provide an aligned vision, the ability to interpret the environment, and the generation of new knowledge

used to create innovative products and services to meet customer needs (Watkins & Marsick, 1996). Schools as learning organizations have the capacity to adapt to new environments and circumstances as its members learn their way to realizing the vision (Kools & Stoll, 2016). The gap in current leadership in schools, and the turnover of unprecedented principals, allows the space for the implementation of an organizational strategic shift towards the creation of a French language learning organization which will benefit students, principals and the organization.

The absence of formal leaders in educational institutions is concerning, especially from the perspective of a school Trustee, as these elected representatives are ultimately accountable to their constituents. The creation of a rigorous recruitment strategy, a bank of available candidates, and a retention plan for principals and vice principals, will provide assurance that there are multiple qualified and competent leaders to ensure organizational sustainability. The existence of these elements can represent organizational stability, which will attenuate teachers, parents, and the school community, while reinforcing public confidence in the system.

Several change drivers contribute to the creation of an organization. External pressures tied the organizational mission and vision surface from the French community, the Catholic Church and from the political arena of the Board of Trustees. While the organization bends to capture stakeholder interests through various processes of consultation and collaboration, it must also consider parent perspectives, student voice, Ministerial policies and Education Law. These competing interests must be captured, prioritized, and work within teacher federation agreements, Ontario Labour Law guidelines, the Human Rights Code and the Canadian Constitution. Every change driver exerts a force influencing organizational strategy, plans, designs, products, services and operations. It is for this reason that the senior executive team, in

collaboration with principal learning teams, and other stakeholders, will develop a strategic plan for organizational learning, and communicate it regularly to provoke transformational change.

Systemic structural changes include the creation of a leadership team composed of instructional leaders who can facilitate the shift to organizational learning. All newly appointed principals and vice-principals will be exposed to the Learning Organization philosophy and culture throughout systemic training sessions. Leadership teams will remodel the existing leadership development plan, collaborate with ADFO (*Association des directions des écoles francophones de l'Ontario*), Laurentian University, and the University of Ottawa, to examine the possibility of offering flexible PQD (*Programme de qualification à la direction*) courses to provide opportunities for potential candidates to obtain their qualifications. Using information from surveys and interviews, the team will elaborate a tiered leadership development program, with the integration of andragogic and collaborative approaches to learning. Program design will be a continuum that provides professional development for aspiring leaders, vice principals or principals with one to three years of experience, four to seven years of experience, or eight or more years of experience in school leadership. These explicit interventions will include learning organization philosophies and approaches throughout training modules.

While district principals design a leadership development program strategy inspired by candidate needs, the inter-sector team will create an aggressive recruitment plan. Competition for school leadership candidates from the 11 other French language boards as well as the multiple English boards offering French-immersion programs, has led to the need for the development of an assertive recruitment approach, which will be co-created by the Human Resources (HR) department, and the executive team. Additional external change drivers include globalization, the

international marketplace, and the need for flexible, adaptive, learning organizations that can respond adequately to external demands. While this may be considered a conservative approach focused on employment opportunities in the global market, a learning organization includes liberal elements such as the consideration of social justice within complex situations.

Organizational Change Readiness

Organizational readiness for change is a critical precursor to successful change implementation and Cawsey et al., (2016) identify three essential components for this condition. When an organization recognizes the difference between the current and the desired state, this is the first indicator that the pathway for change is fertile. Evidence from external environmental scanning combined with internal organizational data demonstrates that modifications to the current state are necessary for organization's survival. Furthermore, the executive team is confident that we will be successful when confronting this challenge and as Cawsey et al., (2016) note, when organizational members have conviction, the more the organization is ready for change. The third component is personal buy-in, and executive team members find the challenge intellectually engaging and professionally satisfying to collaborate with colleagues to overcome this problem of practice. Developing new leaders around an ideal concept, a future vision and an improved organizational state, are individually and collectively motivational. The personal engagement of other organizational members will occur as we enhance individual's awareness of the need for change. Using a transformational leadership approach to launch the change vision, and sharing information that provides a compelling case for change via the communication plan, will heighten organizational readiness.

The executive team is unsatisfied with the status quo, and although this might assist with change progression, it is not sufficient evidence to support the notion that the organization is ready for change. An understanding of the reasons for the need for change, is an important basis that can be leveraged to gain change momentum. Cawsey et al.'s (2016) *Rate the Organization's Readiness for Change* questionnaire (see Appendix A) captures contextual elements, and uncovers FD's change tolerance. The tool used to assess change correlates a high score with a readiness for change, and the district scored 28 on 35-point scale, suggesting that the FD is prepared for change. The scores are used to focus attention on areas that need strengthening to improve readiness. Organizational areas of strength include the categories of executive support, credible leadership and change champions, openness to change, and the readiness dimensions. Some of the organization's energy will be focused on improving the organizational mood, which will be captured in anonymous surveys, and two-way communications during meetings and think-tank sessions. The information gathered in these sessions will help change leaders determine how and where to put their transformative and adaptive leadership skills into action. Another area that requires improvement are that some communication channels are ineffective. A revised communication plan will assist in preparing the organization for change as this will allow the organization to be more likely to accept, understand, and invest in the envisioned future state.

According to Armenakis, Harris, and Field, (1999), there are prerequisites that position an organization favorably for change. The results from the Cawsey et al.'s (2016) *Organizational Readiness for Change* questionnaire demonstrate that our organization is positioned to move forward with the proposed change. The first step is to identify the gap between the current and desired state, and the organization has investigated this in multiple contexts. Next, the need for change is identified, and individuals from multiple departments throughout the organization

believe that the proposed changes are responsive to the PoP. Structures and resources will be deployed to support the change, and this will increase individual confidence and the state of organizational readiness. Finally, key organizational members such as the Director of Education, the senior executive team, and leadership teams support the proposed change.

To compliment the *Readying an Organization for Change* (Cawsey et al., 2016), a secondary tool was used to evaluate the district's inclination to change. The New York State Department of Education's (2014) instrument is structured around 47 research-based change indicators that identify activities, processes, and collaborations that are foundational for implementing significant and meaningful change. The collaborative process of this self-assessment tool allowed the senior team to use strategic thinking capacities to better understand a model for change readiness. The *School Readiness to Change Self-Assessment* (2014) was transposed to the systemic level and administered to key stakeholders. Team leads from the executive team, HR, district principals and school principals completed the 5-point rating scale assessment as they reviewed supporting evidence such as reports, retirement projections, future leader profiles, the system's professional development plan, and mission statements. The combined assessments indicate that the organization scored a four rating and that it will not require support to undertake the change. Strengths appeared in the following categories; (a) relevance and meaning, (b) consensus and ownership, (c) scope and culture, (d) structure and coherence. The assessment highlighted the *focus, attention and letting go* category as an area in need of support, which aligns with the Cawsey et al., (2016) change assessment tool findings. The FD must clearly describe and communicate the desired state of principal performance alongside reinforcing strategies. Communication strategies must be reviewed and refined to better prepare the organization for change, and these will be explored in Chapter 3.

Chapter 2: Planning and Development

Leadership Approaches to Change: Emergent and Complexity Theories

Grounded on the principles of evolution and complexity theory, an emergent approach informs the organizational change (Higgs & Rowland, 2005). This method provides an applicable process to address ill-structured problems, acknowledges the elaborate nature of change, and complements the leadership theories proposed in the OIP. The emergent philosophy views organizations as self-organizing, and in a continual process of adaptation. It challenges the notion of linearity, and uniform change implementation. Primary interventions from an emergent perspective involve building relationships, organizational members' capacity, and contexts for change (Higgs et al., 2005). These elements are explored in the transformational leadership facet of individualized consideration (Northouse, 2016) and in the adaptive leadership approach, where the leader provokes members to explore their changing values, and to develop new strategies and behaviours in a safe context (Heifetz, 1994). The emergent change approach when intertwined with trust, can encourage productive changes (Higgs et al., 2005).

The deployment of this change approach will provoke a progression in conversations between actors to construct new meanings (Higgs et al., 2005). The PoP stems from multiple organizational challenges, which will be addressed at different times, in various departments, with different approaches. The change approach must therefore, correlate in complexity. Some of the anticipated changes are that the traditional role of the principal will adjust to include elements of mentorship and coaching to support vice principals in view of preparing them for a future role with increased responsibility. Superintendents must echo these supportive behaviours, changing current practices where independent decision making dominates collaborative

participation. Superintendents must demonstrate interpersonal and task-oriented behaviours, and foster trust by engaging collegially with principals while demonstrating sound knowledge and competent decision making, to effectively lead organizations (Tschannen-Moran & Gareis, 2015). Balancing the multiple dimensions of their roles, superintendents and principals must find equivalent spaces for their relationships, and the tasks associated with their roles. Collegial leadership, concerned for the welfare of constituents is associated with increased motivation and commitment to shared goals making (Tschannen-Moran et al., 2015). This trust-based approach will accelerate change as it is less directive, perceived as supportive, and egalitarian.

Leaders will reinforce transformational leadership behaviours while building trust by demonstrating individualized concern and respect for followers (Tschannen-Moran et al., 2015). Working closely with other superintendents and our General Director, we will question our decisions, and recognize the biases and assumptions which limit them. Furthermore, our decision making will be open to feedback, allow for questioning, and reflective of the double loop learning which in Argyris' (1977) view, allows participants to question organizational design. We will extend this approach to incorporate an element of Stermann's (2001) model, where triple loop learning focuses on the interplay of dynamic forces, and questions the organization's existence (Cawsey et al., 2016), which is connected to our moral purpose (Fullan, 2003). Traditionally accepted norms for leadership placement and development must be challenged and refocused around the organization's *raison d'être*. In addition, the HR department practices will readjust to adopt new hiring practices, a rigorous selection process, and develop a succession plan. In collaboration with the executive team and system leadership principals, HR will create experience-specific training programs to support principal professional development. Systemic principal preparation programs, currently non-existent, will prepare prospective school leaders

with ethical understandings and indispensable skills to foster trust in their settings. The programs, informed by research, and developed with current principals, will develop a learning leadership model to guide the organization. District leadership teams who model expected systemic behaviors, will incorporate emergent approaches into their training modules that are specific to individual needs, incorporate participative decision making, and consciously provide the context for change to occur. Meetings will evolve from complacent acceptance and passive presence to active, critical participation, grounded in questioning and learning. Collaborative norms and leadership roles will be re-examined within a learning organization vision. Jaworski and Scharmer's (2000) core practices for emergent change include the ability to observe reality from different perspectives, which supplements both Senge's (1996) notion of mental models, and the transformational leadership capacity of envisioning (Northouse, 2016). Organizational members will be trained to understand and appreciate different perspectives, and to become efficient at creating safe, risk-taking environments that promote innovative thinking.

Evidence demonstrates that the role of leaders in the change process impacts the success of the change initiative (Higgs et al., 2005). The intention is to prepare the system and its leaders to accept change as a natural occurrence, and to appropriately respond by altering structures and processes, thereby influencing culture. Linking leadership behaviours to change models, Higgs and Rowland (2005) propose five leadership competencies that reinforce the emergent change approach: (a) creating a case for change; (b) creating structural change; (c) engaging others in the change process and building commitment; (d) implementing and sustaining changes; (e) facilitating and developing capability (p.127), that are supported by transformational and adaptive leadership frameworks.

The proposed change plan is a hybrid model, combining sophisticated and emergent elements of Higgs & Rowland's (2005), *Change Quadrant* (see Appendix B). In line with the sophisticated axe, change is initiated from the top senior executive team who create a vision for change, engage others in the process through inspirational motivation, and provide the intellectual stimulation and tools associated with structural change. However, change implementation will provide broad directions, team-based decision making opportunities, and promote distributed leadership in an environment that supports the development of change capacity, which aligns with individualized consideration. The senior team assuming a facilitative, supportive role, will present and explore the PoP with multiple teams, provide safe contexts for innovation, and challenge individuals to develop learning leadership. We will inspire the collaborative creation of solutions and frameworks for implementation and monitoring. Given the context of continual change, Higgs & Rowland's (2005) findings suggest that a master approach combined with leadership behaviours that generate capacity, is an effective strategy, especially in long-term initiatives. Smith & Graetz (2011) advance a case for a multi-philosophy approach because organizations are multi-faceted entities, populated by humans with emotions and irrational behaviours. No single theoretical approach can address the complexities of the organisation and of multi-level reality. Rather, a creative, unique recombining of multiple theoretical lenses is essential to understand the perspectives through which reality is engaged. Because change is a complex process (Pascale, 1999; Senge, 1997), flexibility will be built into the approach, allowing for malleable rules, and direction emerging from multiple positions.

Leaders will understand their role within this changing approach, and act consistently with the subjective concepts of the emergent change method. It is important to consider both change approaches and leadership behaviours within the context of any change initiative. The

emergent leadership approach will propel change forward, pushing organizational constructs of leadership to shift towards the notion that leaders must build capacity in others, which complements the LO (Senge, 1996) angle this OIP puts forth. The expected leadership behaviours of this model are harmonious with adaptive leadership's central focus, which is to offer organizational members the support to bring about individual change. The precept of complexity theory, where change is messy and complex, lends itself to the adaptive leadership framework which is designed to help members address issues that are hard to identify, and difficult to solve. Adaptive leadership provides an opportunity for members to address change by taking risks and to interrupt unproductive patterns (Heifetz, 1994). Transformational leadership supports emergent change as it develops the capacity to change in others by providing individualized consideration and supports individuals through the change process. Furthermore, transformational leadership aligns with Higgs and Rowland's (2005) leadership competencies. Rather than mandating change, the organization will decentralize the process, and leaders will focus on creating a learning environment within which an emergent approach can function.

In contradiction to a linear, predictive approach, the proposed model is based in complex change theories, and best practices to inform the change process. When leaders foster relationships of trust, care, collaboration, experimentation, inquiry, risk-taking; they can help change organizations into inquiry focused institutions (Houchens & Keedy, 2009). The *Ontario Leadership Framework* (2013) places personal resources as a key feature of effective leaders. Building relationships, developing social interactions, considering context and cognitive schemes are elements the FD will focus upon in workshops and training as they support learning and knowledge creation (Kools & Stoll, 2017).

Framework for Leading the Change Process

Burke (2018) notes that most large-scale fundamental organizational change is not successful, and that planned organizational change rarely occurs as anticipated. Paradoxically, leadership can provoke change by using theoretical models with a directed, planned approach however, the translation of theory into reality often presents unexpected situations that can alter the course of action. Implementation may be inconsistent, resistance may surface and therefore, organizational members should acquire flexible learning capacities to respond appropriately to multiple scenarios. From this perspective, organizational learning (Senge, 1996), is beneficial to FD's organizational landscape.

When examining organizational resistance to change, Godkin (2010) found that leaders can counter change inertia by fostering institutional absorptive capacity. This can be supported by promoting double-loop learning mechanisms and processes (Argyris & Schön, 1978) that are found in Senge's learning organization. The FD can propel insight leverage (Godkin, 2010) that can be encouraged by using structures that promote reflection and knowledge development. The proposed OIP integrates the use of cognitive coaching, communities of practice, distributed leadership, team collaboration, mentoring as well as adaptive and transformational leadership strategies to transform organizational members into learning agents who facilitate change.

Open Systems Theory

Developing leadership for learning occurs within an organizational and environmental context (Hallinger, 2011). Within this open system, effective leadership is shaped by, and responds to, the organization and its environment. Open systems theory is based in an assumption where the world is an integrated whole, and all parts are interdependent (Burke,

2018). The district, as a living organism interacts with its environment, seeks to establish an equilibrium, and represents an intricate set of interrelationships, rather than a linear chain of cause and effect events (Stacey, 2003). There is a dual influence where leaders influence, and are influenced by visions, organizational goals, academic structures, processes, and individual capacities. Leadership is the driver for organizational performance (Hallinger, 2010), but it is also a process of mutual, adaptive influence. A planned organizational change process is proposed, grounded in interpretivist theory, and informed by the ideological paradigm of nominalism. Organizational members must resiliently respond to unexpected circumstances while maintaining a focus on attaining the vision. The adoption of an open-systems perspective allows the executive team to identify areas of misalignment and risk between the external environment and the organization's strategy and structure (Cawsey, Deszca & Ingols, 2016).

Types of Organizational Change

Change can occur for multiple reasons, and it exists on a continuum spanning from episodic to continuous (Cawsey et al., 2016). Viewing educational change as dominated by stability rather than by radical transformation, it is difficult to imagine district thinking and practice engaged in radical, episodic change. The OIP aims to influence people's behaviour by gradually altering organizational structures, functions, and processes. This incremental change will improve organizational areas linked to developing current and future leadership capacity and performance. The primary organizational function of favourably influencing student learning is untouched by the change proposal and therefore, the change is continuous in nature.

When developing a planned change initiative, determining how to change is as important as what to change (Mento, Jones, & Dirndorfer, 2010). The first dimension of the change process

is incremental as changes are made in anticipation of future events (Cawsey et al., 2016). The change is initiated by the senior team, who creates an urgency to encourage the change, which falls within the radical change axe, and as Burke (2018) finds, radical change is best supported by transformational leadership. There are different conceptualizations of change, with various levels of intervention. For example, even though the organizational urgency is the principal shortage, this will be the platform that provokes deeper strategic changes, evolving towards a learning organization. Another discontinuous change is that the senior team will position the organization in a new reality, one where leadership is part of the strategic vision, and learning leaders are intentionally developed throughout the district. Most of the change content will be developed collaboratively between the senior team and middle management, who will focus on implementation. Based in the assumption that an organization is an open system, the principal shortage can be considered the result multiple external environmental changes such as the shortage of French teachers, the competition for candidates between the 12 French language boards, the decrease in interest in the profession, and the academic demands for certification. Internally, there was a misalignment in succession planning, recruitment strategy, and leadership development. Consequently, FD's subsystems, departments, and individuals will adapt and remedy the situation by putting preventative measures in place to avoid a re-occurrence.

As the change initiative approaches the radical axes of re-creation and re-orientation, the more time consuming, and challenging it is to lead effectively (Cawsey et al., 2016). Middle managers fear situations when their ability to control situations is diminished. The redirecting and overhauling axes are centralized in senior management control, thus reducing the likelihood of a successful change approach and therefore, another change dimension is invested in the OIP to counterbalance this limitation. The proposed change approach is reactive with a regulatory

change dimension (Burrell & Morgan, 1979). Unable to accurately predict unexpected changes in the environment, we plan on preparing individuals to adapt by introducing incremental, ongoing, changes. As Cawsey, Deszca and Ingols (2016) remark, when employees are engaged in continual improvement processes, they are goal directed, cohesive, and competent because of their learning. As the senior team uses adaptive and transformational leadership strategies to support individuals, organizational members learn to accept that change is continual, and become less resistant. It is for these reasons that both radical and regulatory change approaches are intertwined in this OIP.

The proposed change has a functionalist angle, where a guiding coalition, the executive team, manages change with predictable, planned steps (Smith & Graetz, 2011). The traditional, rational approach to change is limiting as it considers change to be singular, controlled event however, this change strategy is designed to be conscious of change complexity. The leadership piece of the model is founded in Burns' (1978) conception of transformational and transactional leadership which creates a tension between evolutionary and revolutionary change approaches. The senior executive team sets goals, objectives, and a vision for change, while change initiatives focus on specific dysfunctional pieces of the organization.

Organizational Change Models: How to Change

Preparing organizations for change can be accomplished using a variety of strategies. One tactic is to create dissatisfaction through education. The strategic sharing of information will create an awareness that prepares the terrain for change, and avoids harming the organization's reputation. The status quo has left the district with two schools without permanent leadership, five unqualified vice-principals in acting positions, and 22 principals with under one year of

experience. Principals play a central role in improving school and student achievement and with 80% of our schools lacking qualified and experienced leaders, this dissatisfaction is shared by elected board trustees, parents, and the school community. Retired principals have taken contracts to fill the vacant positions, but their pension limits them to 50 working days. Although human resources internal and external competitions to fill the vacancies have occurred, there has been no interest.

Distinctive change approaches can be applied to different groups and circumstances and this OIP recommends a combination of two change frameworks, the *Change Path Model* (CPM) (see Appendix C), and Senge's (1990) *Learning Organizational Model* (LOM) (see Appendix D) to address the problem of practice. Combining process and prescription, the CPM affords structure and flexibility that compliments change complexity. It maintains that leaders must be aware of changing conditions, able to learn and adapt their understandings and interventions. Moreover, the CPM has an open systems method to organizational analysis drawing on distributed leadership. An elaboration of the CPM's stages in connection to this OIP follow.

Awakening phase. During this phase, the executive team scrutinizes the environment and data to identify the need for change to elaborate a common vision. Having analyzed other French language districts' leadership potential to fill positions, evidence suggests that there are vacant positions in some of the eleven other districts. In such, twelve districts are competing for the limited resource of qualified principals. A PESTE analysis highlights pay inequities between French and English boards, which incites French language candidates to apply for Immersion principal positions in English districts, as the salary and benefit packages are more attractive.

Additional lenses of inquiry highlight that principal positions are less attractive, and generate limited candidates because of the complexity of work increased accountability.

Mobilization. This phase entails communicating with the organization, leveraging assets, and creating collaborative structures to drive change. The executive team will uncover the gap between the desired state of schools with qualified, skilled principals, and reveal the reality of the principal shortage. We will develop a consensus concerning the need for action, and communicate the collaboratively created future vision throughout the organization during meetings, and internal communication strategies. We will then establish the conditions required for change by adapting structures, time, and financial support. Next, we will develop change by clarifying roles and promoting team coalitions and networks, as well as collaborative norms for processes that leverage forums for innovation and creation.

Acceleration. The third phase maintains the momentum for change by celebrating gains, empowering, developing, and encouraging others. Much of this work is facilitated by a leadership that highlights departmental milestones adopted throughout the various change phases. Transformational leadership is fundamental during this phase as leadership must employ motivational strategies that provoke intellectual stimulation, individualized consideration, inspirational motivation and idealized influence (Northouse, 2016).

Institutionalization. This phase tracks changes using a *Strategy Map* (Kaplan & Norton, 2000) and a *Balanced Scorecard* (Kaplan & Norton, 2000) to measure change and to alter initiatives. From an internal perspective, the HR department will create a succession plan with the executive team, an aggressive recruitment strategy, and will work with the systemic leadership team to plan leadership development opportunities for leaders with various experience

levels and from different departments. Although the CPM offers a practical framework, its linear approach is limiting however, change leaders must be aware that the coordination of change is not simple. Nevertheless, the model can be completed with another approach that can equip organizational members with the skills required for complex thinking.

Senge's (1990) LOM, will be embedded into the change initiative and it will use the framework's foundation, *Personal Mastery* as a key to developing individual learning to positively influence organizational learning. As members seek to increase their capacities, they can improve the capabilities of others because the organization develops with its people. The executive team will establish opportunities to promote personal mastery and this will materialize as the leadership training and development department adopts programs that respond to individual needs. Some approaches include offering courses from external providers and trainers. Furthermore, the leadership training teams will engage in discovery, the anticipation of trends, best practices, and external conditions to offer innovative approaches.

Employing an adaptive leadership approach, I will assist team members to expose the values and assumptions that govern their behaviour, and disadvantage their thinking. Staff meetings can incorporate reflective activities such as the ladder of inference (see Appendix E) to expose common mental pathways and self-generating philosophies which can lead to misguided beliefs (Argis, 1984). The model provides a protocol for balancing advocacy and inquiry or for skillful discussion that can be integrated into organizational structures. Furthermore, when investigating problems, a multi-framed approach will be embedded into the FD's processes, influencing individual behaviours and approaches to problem solving.

With the leader as a catalyst at the center of change, Senge (1990) and Cawsey et al. (2016) emphasize the importance of examining multiple perspectives. Senge's five disciplines can be considered on three levels: (a) practices or actions; (b) principles or ideas; and (c) essences or a state of being of those with high levels of mastery in the discipline. Using disagreements as learning opportunities, and developing listening and discussion skills, the organization will promote a learning environment in which individuals will thrive. We will incorporate collaborative learning structures such as action-research, learning laboratories, and invest in healthy dialogue development to alter the current practice of passive training sessions. Team learning structures will bring the organization to a state where members participate in solving problems, and provide innovative approaches to improve student learning. Both Creswell et al.'s, (2016) CPM and Senge's (1990) LOM provide a map to choreograph a change that focuses on increasing organizational learning capacity, and on improving organizational performance.

Critical Organizational Analysis

Diagnosing and Analyzing Problems

Accurately discovering the change purpose requires a comprehension of the complexity and interrelatedness of organizational constituents, and a multi-levelled analysis. The first indicator that a problem exists, is the organization's inability to fill principal positions however, a meticulous analysis of the problem requires a methodical construct to further expose issues. From an open-systems perspective, Nadler and Tushman's (1980) *Congruence Model* (see Appendix F) provides a framework to diagnose problems as it captures constantly changing organizational inputs in their contexts. The model correlates congruence between different

organizational components, and effectiveness while focusing on the nature of their interactions. It revolves around: (1) tasks or the work of the organization; (2) people; (3) formal organization or the structures and systems; and (4) informal organization which includes culture. Moreover, when the external environment changes, the internal organizational environment must react to ensure an alignment. The *Congruence Model* template (Cawsey et al., 2016, p. 92-3) helps diagnose the OIP's problem of practice and provides a pathway for potential solutions. To supplement the *Congruence Model*, perceptual surveys aligned and approved by FD's ethics protocol, can uncover motives behind the reluctance to assume leadership roles. Unstructured interviews, informal and formal conversations will extrapolate detailed qualitative data to enhance the depth of the exploration of this topic.

Conceptual Model for Change: What to Change

Cawsey et al.'s (2016) *Change Path Model* and Nadler and Tushman's (1980) *Congruence Model* are the theoretical frameworks that guide the OIP's change focus. The *Congruence Model* considers organizations open systems that extract input from the environment, subject it to a transformative process, and produce output (Nadler & Tushman, 1980). Historical and cultural elements are environmental factors in the Francophone education system. They influence future actions, and effect which human and technical capital resources the district draws from the environment. Furthermore, the organizational mission and strategic planning are linked to our history, religion and culture. As the FD exists within a minority context, environmental awareness is acute, and the current political context threatens the survival of French language childcare service providers, who are our future clients. As well, provincial funding for French language resources has decreased, which will limit capacity building, and

indirectly impact student learning. Another external environmental factor, is the decrease in qualified French teachers in Ontario, which results in a reduction in potential principal candidates. French districts compete within a market with few commodities and the executive team will consider these input factors as we align resources with the strategy to attain our vision.

The fourth input, strategy is the most important because it shapes how other inputs are used and organized to undergo the transformation process that results in organizational output (Nadler & Tushman, 1980). The existing leadership strategy is ineffective, and must reflect current reality. In the past, candidates from Quebec or Northern Ontario occupied leadership positions, however, Quebec is experiencing teacher shortages (Karsenti, Collins, Tardif, Borges, Correa, Desbien, Gauthier Lepage, Martineau & Pellerin, 2018), which challenges our recruitment model. The HR department will review and modify their strategy to adjust to the external environment. As well, a succession plan will be developed in anticipation of an unpredictable future with limited principal candidates. Internally, the organization will create a cohesive leadership strategy on a continuum geared to individuals and their experiences. Mentoring and coaching programs will be renewed to support principals and vice principals as the changing nature of their organizational function, has evolved and expanded significantly. The strategy is continuous because it maintains its orbit around the organizational purpose, student learning, and builds on currently decaying structures.

Nadler and Tushman's (1980) transformation process includes work, the formal organization, the informal organization, and people. Work is captured in teams or departments which require coordination and integration (Bolman & Deal, 2013). Although main functions do not alter significantly, they assume a different position from reactive, to proactive, allowing our

members to adapt to change. The formal organizational structure, will not alter, however, the way work is managed will evolve into a learning leadership approach where elements of a learning organization (Senge, 1990) modify the informal organization, especially the way work is performed, the norms, and accepted processes. Values around organizational learning, and leadership styles will alter with the implementation of new leadership development programs. Organizational culture is reflective of Francophone history, however it will also reflect its future.

With a refined recruitment process designed to select ideal candidates, and an intentional leadership development program to influence our future leaders' capacities and attitudes, the FD will be strengthened with adaptable, individuals capable of creative thinking in a changing world. They will also be aware of internal interdependence, which aligns with Senge's (1990) systems thinking. While each team will have differing systemic obligations, they must consider the impacts of their actions beyond their sectors. Successful change leaders understand what and how to change while appreciating the dynamic nature of organizations and change both at the individual and the systemic level. Finally, the output will include an organization designed around learning (Senge, 1990) and individual learning leaders who develop micro learning organizations such as schools and thinking teams. These outputs will be defined and measured to ensure that the vision is accomplished. Because organizations are dynamic, the diagnosis should change over time, and the congruence will adjust to align relationship between components.

The *Congruence Model* (Nadler & Tushman, 1980) will help diagnose the OIP's problem of practice, and provide a pathway for potential solutions. One of the model's limitations is that it captures organizational reality from one rational perspective. It is considered a traditional model that allows strategy to dictate system alterations. Although the direction of the model may

be appropriate, change leaders must consider that organizational factors fluctuate, and prepare the organization to address potential problems in organizational outputs, or within transformational processes. The balance point shifts with modifications in environmental conditions and organizational needs therefore, change leaders focus on harmonizing flexibility and adaptability with alignment.

To achieve an equilibrium between simplicity and complexity, the organizational analysis, founded in Nadler and Tushman's (1980) *Congruence Model*, is complemented by Stacey's (2013) *Complexity Theory*. Grounded in the notion that organizations are complex, paradoxical, and resistant to managerial control, the *Complexity Theory* allows the flexibility required for a learning organization to flourish. Specifically, the paradox between certainty and control, instability and innovation, and the unknown is something that organizational members embrace when planning long term goals that may have short-term procedural fluctuations in change plans. The approach combines change models to adapt to an organizational existence between stability and chaos, allowing individuals to understand and work with inconsistencies.

Possible Solutions to Address the Problem of Practice

In response to the multiple challenges, three potential solutions to the problem of practice are the focus of this investigation. These solutions may occur concurrently, or at different times depending on the intervention. Although this OIP proposes reactionary changes to address the problem of practice, an underlying transition to a learning organization will emerge as part of a second change phase, indirectly addressed in the scope of this project. The current situation disrupted the status quo, and while an immediate solution to improve future conditions is considered, the propositions will inherently embrace the philosophy of a *Learning Organization*

(Senge, 1990) by embedding this conceptual model's strategies into interventions, impacting the organizational fabric.

Principals play a critical role in student and school success, and improving leadership is key to reforming schools. Research reveals that strong, consistent, school leadership is essential to improving schools, and that school success is directly dependent on principal's knowledge and skills (Marzano, Waters, & McNulty, 2005). Educational leaders have an impact on successful functioning schools, organizational climate, teacher attitudes, classroom instruction, curriculum implementation, and student learning opportunities (Friedman, Friedman & Markow, 2008; Hallinger & Heck, 1996). Essentially, highly effective classroom teachers correlate with highly effective school principals (Crews & Weakley, 1995; Darling-Hammond et al., 2009). In addition to leading the instructional program, French language principals have an additional responsibility, that of preserving the vitality of French language and culture in schools (Leurebourg, 2013). Possible solutions to the school leadership shortage in French language boards in Ontario, are examined below and include *The Human Resources Approach*, *The District Leadership Development Approach*, *The Structural Approach*, and *The Integrated Approach*.

The human resources approach. This section explores structural and procedural changes to the HR department that must occur for the district to attract outstanding individuals to lead schools as learning organizations.

Solution 1. Effective recruitment and selection of school leaders is one of the most challenging tasks in educational organizations (McCarthy, 1999; Pounder & Merrill, 2001), and because the role has evolved tremendously, finding qualified, talented personnel to conduct the

work requires an extensive and aggressive recruitment process directed at placing and keeping qualified individuals in schools. The current leadership shortage is projected to continue beyond the next five years, and HR must review existing recruitment practices and policies to enable the district to hire the best candidates for schools (Castetter & Young, 2000; Rebore, 2001).

In the absence of a formally developed recruitment strategy, an analysis of the current recruitment practices led to several questions: (a) What is considered an effective principal? (b) What are the best methods to attract qualified, skillful principals? (c) What are other districts doing to attract principals? These questions are a springboard for the HR team's inquiry into current recruiting and hiring practices in other districts and in other organizations. The multi-disciplinary team consisting of HR members, teachers, acting principals and one superintendent, will ensure a variety of perspectives and experiences to enrich the creation of human resources strategies. Repositioning focus from managing employee conflict and federation grievances, to hiring qualified, skilled individuals for key positions, will become a HR priority. The interview and selection processes will be revised to include rigorous methods that capture remarkable candidates, and elevate the systemic perception and prestige of the profession. Before the interview, candidates will provide a self-reflective portfolio demonstrating their practices referencing those identified in the Ontario Leadership Framework (Ontario Institute for Educational Leadership, 2013), undergo an emotional intelligence appraisal, and require reference letters from previous supervisors, community members, and the Catholic Church. The selection procedures will be structured around information relating to the candidate's work history, education, and training (Normore, 2004). This is an area that has never been deliberately planned or organized, and even the creation of the interview panel must be altered. A list of

approved candidates will allow the district the luxury of time to reflect upon school leadership placement while matching individual strengths with school profiles.

The final component is the creation of a succession plan to identify possible future gaps in school leadership positions. This ongoing process encompasses the recruitment, selection, and retention of school leaders to ensure an abundance and variety of trained individuals consequently, enabling a smoother transition for leadership turnovers. The increasing number of retirements and unpredicted absences puts the FD at risk of not having a strategic approach to school leadership. A study by The Ontario Institute for Educational Leadership (2008), demonstrates that almost 50% of school principals in Ontario will be eligible to retire in 2018. From a French language school board perspective, there are additional obstacles to succession planning such as: (a) certification requirements limits the pool of qualified candidates; (b) candidates can only be selected from the field of education; (c) there is a shortage of qualified teachers; and (d) most teachers are reluctant to apply for leadership positions (OIEL, 2008). The executive leadership team will meet regularly with the HR team to support them, to discuss succession needs, and to evaluate the plan's impact. Above ensuring that all positions of added responsibility are filled with competent leaders, details regarding the progression and the effectiveness of HR strategies will be examined during monthly team meetings. Together, these strategies should solidify clear objectives for the HR team to create and to maintain a competitive method to fill principal positions with powerful candidates.

Resources required. Initial resources include a marketing plan to attract potential internal and external candidates, and this responsibility can be assumed by the FD's communications department. This may include the participation of the HR team at various

Principal Qualification courses to extend the district's exposure. Furthermore, there is a need to establish and maintain a comprehensive database about school and system teachers and administrators in the district, and this can be accomplished with the information technology department. A financial investment is required for the creation of a HR leadership recruitment position, and this individual will renew the hiring and interviews process, as well as establish leadership portfolio criteria. Time is another required resource, especially because principals and teachers will participate in the collaborative process to create and implement solutions, and develop new approaches beyond this preliminary list of solutions.

The district leadership development approach. The current district leadership program requires a re-alignment and this section describes a comprehensive district learning leadership development program. The curriculum, delivery models, cognitive coaching, mentoring, problem-based learning, and principal coaching teams, are explained, as they will be incorporated into the new approach.

Solution 2a: A curriculum for building learning leadership. The FD must uncover ways for developing knowledge and skills to prepare future and current school leaders. An underlying assumption to this proposition, is that leadership skills and behaviours can be taught and developed (Darling-Hammond et al., 2007; Levine, 2005) through structured, intentional programs that equip school leaders for a globalized, ever-changing society. Second, the main purpose of educational leadership for learning is to facilitate the existence of schools as learning organizations, focusing on high-quality learning and teaching. In this context, learning leaders are proactive, creative change agents who distribute leadership, nurture other leaders, facilitate collaborative knowledge exchange and innovation (OECD, 2016). The belief is that successful

schools exist because of effective leaders with vision and direction, centered on sustainability (Schwann & Spady, 1998) and therefore, the second solution is to offer a continuum of different leadership development opportunities with various delivery models, tailored to individual needs, and professional experience.

Scott & Weber (2008) highlight the tension existing between expectations for leaders to integrate two seemingly opposing roles: the instructional leader and the manager. The district leadership development programs will integrate this into the curriculum and will also examine school governance issues and educational management when balancing system variables. Good management is as important as good leadership (Piggot-Irvine & Youngs, 2011) therefore, FD's leadership development program, inspired by an organizational learning approach, will integrate managing change, distributed leadership, conflict management, and problem resolution into the curriculum (Argyris, 1977; Senge 2006). General topics embedded into the program design include school governance and strategic management, educational leadership, resource allocation, financial and legal risk management, collaborative management, organizational learning, cultural and equity issues, and organizational theory (Cadno & Fitzgerald, 2005; Schleider, 2012). While the distinction between leadership and management can be perceived as dichotomous, an integrative approach will embrace the tension as expressions of the complicated reality of school leadership (Leithwood, 2012). The literature demonstrates that curriculum approaches informed by research, should include a variety of elements from leadership theories, problem solving strategies, decision making frameworks, change models, instructional leadership approaches. These will be balanced with practical, procedural knowledge, management strategies, the use and analysis of data, and action research (Brauckmann & Pashiardis, 2012; Darling-Hammond et al., 2007; Heck & Hallinger, 2013; Leithwood, 2007, 2012; Scott &

Webber, 2006). Furthermore, there will be a core curriculum focusing on instructional leadership, with different areas of concentration, depending upon group needs. The district will incorporate Brauckmann and Pashiardis' (2012) research that expresses the need for leadership training and improvement in trust building and collaboration, as well as other research that encourages instructional leadership, human resource development, and initiating school improvement and development (Darling-Hammond et al., 2007; Leithwood, 2012).

Leithwood's (2007) concept of instructional leadership highlights the indirect impact a leader can have on student learning outcomes by mediating factors that influence learning and teaching. The primary role of the principal as instructional leader who can ensure quality instruction, and improve student's academic achievement, is central to district professional development efforts (Brauckmann & Pashiardis, 2012; Marzano et al., 2005). Leaders must develop this component of the technical core of schools and therefore the program will focus on building and sustaining a school vision, sharing leadership, leading a learning community, using data to guide decision making, and on monitoring curriculum and instruction. The OECD's comparative review (Schleicher, 2012) identifies supporting, evaluating, and developing teacher quality as the core of effective leadership and therefore, the leadership development program will include these improvement elements within the curriculum.

Another framework that will influence the program design and content, is *Schools as Learning Organizations* (Kools, & Stoll, 2016), based on Watkin & Marsick's (1996) model. Viewing school leaders as high-level knowledge workers, the leadership development program will include topics such as distributed leadership, leaders as change agents, developing culture and conditions for learning organizations, creating a common vision, values and goals, change

theory and innovation, and how to promote and support collaboration (Kools, & Stoll, 2016). Scott and Webber's (2006) comprehensive *4L model* encapsulates multiple leadership dimensions for example, career stage, aspirations, entrepreneurialism, professional skills, instructional design and assessment literacy, crisis management, and leadership development. The FD's responsive model will also examine priorities, motivation, transitions, self-reflection, goal setting, embracing cognitive dissonance, innovation, trust building, collaboration, instructional design, legalities, and action research. The district leadership program will combine pieces of this model to develop PD that is responsive to individual and organizational needs and profiles.

Leaders must understand how to gather, validate and analyze data to inform decision making from the micro, or classroom level, to the macro, or school level (Scott & Weber, 2008). These pieces will also be integrated into the program while focusing on instructional activities, building professional learning communities (PLC), and using data to monitor progress (Darling-Hammond et al., 2007). School leaders play a key role in integrating external and internal accountability systems by supporting the teaching faculty in aligning instruction with learning goals, and performance standards (Schleider, 2012) and the FD will build leadership capacity in these areas by using reflective practice that has the potential to transform leaders into insightful practitioners (King, & Nesbit, 2013; Leithwood et al., 2012; Rogers et al., 2016).

Solution 2b: Delivery models for building learning leadership. Studies emphasize the importance of carefully selecting program candidates (Darling-Hammond et al., 2007; Schleider, 2012) and a program selection process will be required before candidates are admitted into the program. Learning leadership development program design will be intentionally conceptualized

with a series of well-coordinated, ongoing activities and opportunities for the refinement of individual and group skills and capacities. Furthermore, it will provide diverse field-based internships, problem-based learning strategies, and collaboration between universities and school districts. The literature exposes various program delivery models, but one common thread is that design must value a multiplicity of strategies for example, course lectures, 360-degree feedback, coaching, readings, problem-based learning, theory and practice, mentorship, and case studies. The organization will conceptualize learning more broadly than simply training courses that provide face-to-face and on-line learning, to include more informal strategies of mentoring, coaching, job shadowing, job rotations, challenging assignments, and other experiential alternatives. It will place participants in cohorts that are reflective of career-stage orientations for example aspiring leaders, emergent leaders, new principals, and experienced principals (Braukmann & Pashiardis, 2016). The program will address the personal nature of learning, consider the individual needs of professionals (Rogers, Hauserman & Skytt, 2016) and incorporate various methods.

Cognitive Coaching is another approach that will be integrated into the district leadership development program. Focusing on developing internal thought processes and self-directedness, it builds school leadership capacity while provoking a change in the behaviours of new principals which increases their preparedness for the role of principal (Costa & Garmston, 1994, 2002, 2012 as in Rogers et al., 2016). Results demonstrate that cognitive coaching improves the knowledge, practice, thinking, self-reflection, self-efficacy, and confidence of new principals (Rogers et al., 2016). Participants will be carefully selected, and clear guidelines, expectations and behavioural norms will be established from the outset. Resources required for this solution includes attributing time for coaching within the program, and appropriate training for coaches.

Hansford and Ehrich's (2006) literature review highlights the positive impact of mentoring programs for principals, which is another feature of the FD's leadership development program. Mentoring relationships can play key roles in creating and sustaining a learning organization (Buck, 2004), the district leadership development strategy will include a two year mentoring program for new principals and vice-principals. Explicit mentorship training for experienced principals will be embedded into the professional development program, and one objective will be to build the capacity of all experienced principals to mentor new principals and vice-principals. Mentoring facilitates professional development for mentee and mentor because both parties involved in the process bring different knowledge into the relationship that is mutually beneficial (Hargreaves & Fullan, 2000). Mentoring will strengthen the organizational learning focus of the OIP, and connect to the transformational leadership approach as mentoring uses transformational theory through non-judgmental critical reflection, and addresses the andragogical principle that experience is the richest source of adult learning (Klinge, 2015). In addition to the strong academic components of the leadership development program, a practical dimension of structured mentoring will solidify the program as program designers will concentrate on the compatibility of the participants, and on the quality of mentor training (Hansford & Ehrich, 2016; Schleider, 2012).

The *Problem-Based Learning model* (PBL) (Hallinger & Bridges, 2017) is a learning method embedded within specific contexts that can be integrated into different curricular and instructional models of FD's leadership development program. The pedagogical power gives individuals the opportunity to learn to learn, and the delivery model is successful in bridging the gap between learning to lead in the classroom and leading learning in the school (Bridges, 1977; Hallinger & Bridges, 2017). Supporting the learning organization model, PBL requires learners

to understand and apply research, theory, and expert knowledge to problems practitioners face. From a social constructivist perspective, the co-creation of knowledge will occur as principals engage in institutional and discursive processes that develop their problem-solving capacities. Rather than offering a training module during a specific point in time, leadership development will be continuous and embedded in everyday work, and there will be time for participants to absorb, practice, discuss, and adapt knowledge to working contexts (Garet, Andrew & Desimone, 2001; Guskey, 2000; McClelland, 1994; Rogers et al., 2016). Different levels of experience will inform the creation of cohorts, and different programming will address their needs as they progress along the leadership continuum (Braukmann & Pashiardis, 2016; Scott & Webber, 2008). Experienced leaders require training on instructional and strategic leadership, while new principals require training on technical issues such as financial and resource management. Aspiring leadership programs will cultivate school leadership skills and capacities, and create a pathway to school leadership for teachers or instructional leaders who may have not considered a leadership position. Leadership learning will be ongoing and extend to every career phase as each presents its own dimensions (Cardno & Fitzgerald, 2005; Schleider, 2012).

Dalakoura (2010) proposes a collective systemic framework for leadership development rather than an individualistic endeavour, because leadership development is deeply linked to organizational human capital. However, a shortcoming of this model is that leadership development at all levels is more difficult to design and implement than programs that target individual skills and competencies. The FD's flexible model will offer multiple opportunities for professional growth. Individuals may engage in the traditional form of sequential module delivery for example, a series of thematic PD sessions. The alternative, is an *à la carte* model, where individuals select mini-lectures or lessons from a virtual platform during regular work

hours. The large geographic area of our district influences the delivery method, and PD opportunities will be offered at night, and during weekends. The FD program design will integrate adult learning principles, offer internship opportunities in schools with principals (Schleider, 2012), and will retain quality instructors who are responsive, sensitive, and knowledgeable (Piggot-Irvine & Youngs, 2011). When required, the FD will invite external experts to ensure that new knowledge and skills are infused in the program (Joyce, Calhoun & Wolf, 1993). Growing learning leaders will occur in a relevant, contextualized environment (Cardno & Fitzgerald, 2005; Leithwood, 2012; Merriam and Caffarella, 1999; Scott & Weber, 2008), tied to strategic imperatives, and because it is a social process, it will be developed in everyday practice with coaching, and follow-up activities to ensure notions are embedded in practice (Dalakoura, 2009; Guskey & Sparks, 1991; Hernez-Broome & Hughes, 2004).

There is a negative perception of the role of the school leader, and this contributes to potential candidate's reluctance to consider the position. Role expectations seem overwhelming as they include instructional leader, supervisor, public relations officer, fiscal manager, human resources expert, disciplinarian, building manager (Normore, 2004). In response, this OIP proposes the creation of two principal consultant teams to support school leaders with individual coaching sessions to model creative problem solving strategies, and to guide principals, while developing their knowledge and capacities. The profession is often considered isolated, and the district leadership development team will forge relationship focused on co-learning.

Resources required. This solution requires the creation of a leadership development team to investigate best practices, establish a long-term development plan, and implement the program, which entails a financial impact. Organizational change will be assessed, and the team

will develop evaluative frameworks to examine the effects of the leadership development program, and whether there is a transformation in participant knowledge and skills that correlates to a change in professional practice. The *Plan, Do, Study, Act* (PDSA) cycle (Deming, 2000), or the *Continuous Improvement Model* (Shakman, Bailey & Breslow, 2017), will be used to study solution implementation, and to identify intervention effectiveness. Furthermore, the salary and transportation costs for the two teams of experienced principals, is a financial investment the FD will review in relation to its anticipated impact.

The structural alteration approach. The third recommendation is to revisit the role of the principal in each school by balancing administrative responsibilities and instructional leadership between 3 learning leaders: the principal and two vice principals.

Solution 3. Countries such as the UK, have added office roles to assume some of the principal's administrative tasks (Clune, 2008), and the FD must consider how to delineate the nature and scope of these roles while investing in a structural change where principal portfolios are divided and distributed to two vice-principals. A first-year vice principal would assume responsibility for health and safety, attendance, building maintenance, and student discipline. Second year vice principals would be responsible for special education, student success, transitions, and community relations. The increase in responsibility, and the focus on specific portfolios, will build capacity. This model proposes that the principal is a mentor for the vice principals, and concentrates on instructional leadership. The possibility for multiple portfolio combinations are dependent on school contexts, however it must be maintained that the principal focuses upon instructional leadership and on mentoring vice principals.

Resources required. The addition of 30 vice principals into schools is costly and challenging to realize, especially since the PoP centers around a district leadership shortage. The transition time, and the training required to transform the culture, must be factored in when considering this recommendation. An option could be to invest in 2 three-year pilot projects, one at a high school and one in an elementary school, to examine if the proposed structural change is beneficial, and if it has an impact on student learning.

The integrated approach. This hybrid model proposes a combination of the human resources, and the professional leadership development approaches. It is less taxing on the already limited human resources, more cost effective, and provides a gradual systemic change.

Solution 4. The first solution is valid because the district has the human resources to revisit the recruitment and selections components. It requires the employment of an individual outside the teaching sphere, and a collaborative realignment in HR focus and direction. The second solution, the creation of a learning leadership development program, has multiple functions, and necessitates the re-organization of an existing structure. The benefits of this approach are twofold: it will serve as an aspiring leaders program, and it will develop and recruit internal leadership capacity. The third component of this proposition includes two principal coaching teams, to develop principals' skills by coaching and providing job-embedded support.

Resources required. The actualization of this solution requires the addition of five individuals to FD's staff. Four of which are contractual agreements, as it is likely that the principal teams will be composed of recently retired principals. The organization will have to re-organize positions within the systemic leadership team to accommodate the new vision however, the disruption is minimal.

Leadership Ethics and Organizational Change

Increasing performance-driven accountability permeates the educational realm and competing interests and obligations impact the direction of change. Therefore, the ethical considerations of the change initiative, the leadership approach, and their impact on implementation must be considered. Social and relational practices concerned with the purpose of education add another dimension to leading change (Ehrich, Klenowski, & Spina, 2015), and the change leader must be conscious of the multi-directional interrelation of ethics when motivating change. Leaders may have more power than constituents, and because leadership involves influence, leaders have a significant ethical responsibility for how they affect others. The following exploration of proposed leadership approaches and change models expose their relationship to morality within the organizational context.

Leadership theory must transition to perspectives that account for the complex adaptive needs of organizations and individuals. This OIP proposes that leadership, as opposed to leaders, is a multifaceted process emerging in the interactive spaces between people and ideas. That is, leadership is dynamic, and transcends the capabilities of individuals alone. It is the outcome of interaction, tension, and exchange of the rules governing changes in perceptions and understanding. When investigating the leadership frameworks igniting the OIP's change, an adaptive leadership approach prepares constituents to adjust and navigate through periods of disequilibrium provoked by change (Heifetz, Grashow, & Linsky, 2009). From this perspective, I will interactively move through change with organizational members, collectively understanding, and creating the change we hope to bring to improve the district and ourselves.

Adaptive leadership connects to a larger purpose extending beyond professional and material gains (Heifetz et al., 2009), where values are clarified and drive purpose, which aligns with the transformational leadership model (Kouzes & Posner, 2012). One of the district's larger motivations, is to retain the best possible leaders to create learning organizations to improve student learning. To attain this goal, the leader must determine complex, adaptive challenges, grounded in values, beliefs, and interests. Next, the leader must mobilize individuals to adapt to this new reality by creating an environment receptive to conflict resolution and change (Heifetz et al., 2009). The process focuses on equity, inclusion, and experimentation, creating a safe context in which I will invest in understanding individuals, and how change affects them. In practice, this requires structures, operational processes, and decision making to be flexible, non-hierarchical, and empowering. Understanding adaptive leadership through this supportive lens supports Starratt's (2009) ethic of justice as described in Ehrich, et al., (2015), where fair and equitable treatment is fundamental. With human relationships at the center, this reinforces Starratt's (2009), ethic of care, which is linked to transformational leadership's individualized consideration. Adaptive leadership values ethics and purpose, and has much in common with the transformational leadership framework, which are the leadership dimensions that drive this OIP.

Ethical leaders speak to individuals about identity, what they can become, and how they can live better (Freeman, Martin, Parmar, Cording & Werhane, 2006). This construct is found in both adaptive and transformational leadership approaches that influence individuals in different ways to engage in organizational change. Leadership includes the ability to influence others toward the accomplishment of a desired outcome (Northouse, 2016), and ethical leaders enable people to do the right thing (Freeman et al., 2006). In search of justice, transformational leadership encourages people to challenge the status quo, much like Starratt's (2009) ethic of

critique, where individuals confront processes and reflect on practices. The executive team is a role model for this practice, and demonstrates established organizational behaviors (Brown & Trevino, 2006; Kouzes & Pozner, 2012). Zhu, Avolio, Riggio, and Sosik (2011) proposed that transformational leadership influences the ethics of individuals and groups by positively affecting moral identities and emotions, which leads to moral decision making and action. With an organizational moral purpose grounded in improving student learning through the intentional selection, recruitment and development of leaders, the OIP's purpose is to design a learning organization that helps individuals and groups attain their fullest potential.

Ethical decision making is incorporated into the *Change Path Model* (Cawsey et al., 2016) as leaders consider the ethical consequences of their decisions, and make fair choices. This begins with the *Awakening* phase where leadership justly identifies the need for change always with the intent of improving student learning when analyzing data, and developing the need to change. Ethical leaders are honest, trustworthy and demonstrate integrity (Brown et al., 2006), therefore, the change initiative is transparent, and removed from personal benefit. Trust is associated with credibility, consistency, and predictability in relationships, while honesty is the crucial for a trust-based relationship. When *Mobilizing*, the executive team focuses on encouraging others to catalyze and communicate the change. We assume the change will benefit organizational learning, and positively impact student learning. The dimensions of democratic decision making, and shared leadership teams contribute significantly to the change initiative by allowing the forums and relationships required for developing interventions, strategies, and innovative solutions to the PoP. Dion (2012) illustrates that shared leadership finds trust in collaboration and assists other in achieving their potential, regardless of hierarchical position. Throughout the *Acceleration* stage, leaders focus on developing others by using coaching,

mentoring and training as well as processes and structures that promote learning organization behaviors. Finally, during the *Institutionalization* phase, leaders impartially determine what balanced measures can help evaluate organizational needs, progress and goal achievement.

Creating a learning organization can be contemplated from an ethical perspective when considering Senge's (1996) description as collaborative, free, settings where individuals advance their capacity to attain desired results, and to develop innovative thinking. The OIP's objective is to recruit, develop, and retain principals and the underlying goal is to use this opportunity as a springboard for organizational rejuvenation. As the past generation of educational leaders retire, the expectation is that this turnover will allow for an evolution into a learning organization that creates knowledge, and is skilled at modifying its behavior to reflect new insights. Adaptive to external factors with an internal capacity to evolve, the FD will create a context that support these activities, and integrate them into the fabric of daily operations.

A potential ethical issue associated with the focus on recruiting and developing principals at the FD is that because there is a limited number of leaders, a recruitment campaign may have a negative impact on other French school boards. Contrary to this notion, French boards have always competed for French speaking teachers, administrators, and support staff. More recently, English boards have emerged as competitors as they attempt to attract French-speaking employees for French immersion schools. Therefore, the increase in focus on recruitment is to alleviate the pressure from additional competitive sources, and to secure the organization's future. Aligned with the collaborative, collegial culture that exists between the 12 boards, the FD will share our strategies for internal leadership development with our French school board counterparts. Another anticipated ethical concern is that the focus on developing school leaders

neglects other departments and their professional development. The proposed initiative concentrates on developing school leadership; however, it is a starting point for the organization, and the model will be altered to respond to other systemic department needs once the initial change plan is enacted.

The FD will use quantitative and qualitative data to diagnose problems and a continuous improvement cycle to monitor progress, and inform decision making. Collaborative norms ensuring a safe and tolerant learning environment for shared learning will promote experimentation, and test new knowledge. As a transformational leader, with high expectations for myself and for organizational members, I will model a mind-set that values productive failure, and cultivates open, attentive listening. The FD, as a learning organization, will surpass the self-interest of accomplishing organizational goals, and help individuals develop and perform beyond expectation.

Chapter 3: Implementation, Evaluation, and Communication

This chapter connects with the organizational analysis and the change strategy presented in Chapter 2 as it develops a plan for implementing, monitoring and communicating the change process. The goals and priorities for the change are outlined in this section, and intertwined with a strategy for managing the transition, while considering both organizational and individual perspectives. A continuous improvement model, measurement tools, and change process supports are discussed as they frame the monitoring and evaluation of the change progress. Although woven throughout each section of this chapter, a plan to communicate the need for change and for influencing change are also distinctly outlined. Lastly, strengths and limitations are examined as well as next steps and future considerations.

Change Implementation Plan

Recruiting, retaining and developing the best candidates to lead learning organizations is paramount because human capital is a vital resource that generates organizational competitiveness (Bresman, 2013). Consequently, we will invest in approaches that lead to knowledge creation to ensure the development of a learning organization where leaders are determined to positively impact student learning (Ndinguri, Prieto & Machtmes, 2012). Operationally, the change will create significant alterations to existing procedures, roles, and responsibilities, requiring resources to engage differently with external and internal prospective and existing leaders in schools and in the system. The destabilizing effect of change will however, provide solutions anchored in the district's strategic orientation of improving student success, a familiar concept for educational professionals.

Cawsey, et al.'s, (2016) *Change Path Model* (CPM) is the predominant implementation framework that guides the application of the proposed solutions. During the *Awakening* phase, the executive team scans the environment, and establishes the need and nature of change by collecting internal and external information to explore and validate the problems. The problem is examined using Bolman and Deal's (2013) four frames analysis to ensure an accurate diagnosis. Inspired by Nadler and Tushman's (1989) framework, the team will identify the gap between the current and desired future state and determine what needs to change in the FD. This information will be shared across the organization, creating a sense of urgency and the need for change (Burke, 2018; Kotter, 1996). The executive team will elaborate a vision for change and share the direction with organizational team leads. They will devise multiple solutions to address the limited number of qualified, knowledgeable and skilled professionals to lead French language schools. We will work with different teams including human resources, system principals, and school principals, using Nadler and Tushman's *Congruence Model* (1989) to diagnose change needs, identify strategies, and assess the organization's readiness for change. Although change objectives will vary by group, the communications department will deliver a consistent message across the FD inciting the need for change, and disseminating the vision through multiple pathways. While these messages are transmitted, education will be provided for individuals and groups to mitigate resistance. For example, the HR department will be trained in effective recruiting and hiring practices and external professional organizations will guide them in the creation of a succession plan. System principals and instructional coaches will engage in research and collaborate with ADFO, and the IEL to create the curriculum for a tiered leadership development program. They will also build organizational learning functions into existing organizational processes which will allow for an accepting, respectful change environment.

These supports will clarify the change process, define roles, expectations, and strengthen the perception of change as a successful, worthy pursuit.

The *Mobilization* phase identifies the distance between the present and the future state by examining existing formal structures and understanding how they can leverage the realization of the desired future (Cawsey, et al., 2016). The executive team will consider multiple perspectives, use feedback, dialogue and collaborative communication opportunities as frameworks to assess power dynamics, and build coalitions to support the change (Burke, 2018; Cawsey et al., 2016; Kotter, 1996). The executive team will investigate the relational aspects of change, or how we can engage individuals in creating the change rather than being passive subjects of change. We will identify individual capacities, and understand their interpretation of the change, because change involves the negotiation of new meanings (Ford & Ford, 1995). The complexity of organizational life includes powerful interests who play a role in defining organizational meanings, including the meaning of change. Essentially, we will strategically mobilize leading members to positively influence the initiative, and to build support for the change. As principal roles evolve to incorporate mentoring and coaching for aspiring leaders, key resisters will be invited to participate in shaping and delivering the change.

The executive team influences the meaning of the change and Kaplan and Norton's (2000) *Strategy Map* and *Balanced Scorecard* are tools that will help define processes, outcomes and situate expectations. A collaborative approach is most valued when working with stakeholders to foster the conditions for change, and the executive team will exercise influence rather than positional power to promote change acceptance. With the help of system principals and team leaders, the executive team will design training and education sessions for teachers, HR

staff, and communicate the changes with organizational members through multiple channels. The nature of research, data, and communication strategies will be differentiated according to the intended audience and purpose. It is during this phase that the executive team will encourage all voices to contribute input and ideas regarding the change. The conditions for this authentic sharing and co-learning will be facilitated through town halls, online surveys, think tanks and design thinking forums which keeps members involved in the change decisions, and promotes a two-way communication flow. An assessment of change readiness is a significant change implementation focus, and it will occur during the *Mobilization* phase (Burke, 2018; Cawsey et al., 2016).

Organizational and Individual Readiness for Change

Macro change management (Sung, 2015) targets structures, overall processes, and capabilities and it is the change leader who initiates this level of change. Using a systemic perspective, there is value in investigating the organization's preparedness for change, which combines perceptions and beliefs. Change readiness is a cognitive precursor of the behaviours or resistance to, or support for, organizational change (Armenakis, Harris, & Field, 1999). There are evaluation tools that can help the change leader position the organization in relation to its inclination to change. By using data from observation, interviews, and surveys (Armenakis & Fredenberger, 1997), the executive team will determine if the organization is in optimal situation to provoke change. In addition to this information, the results from the Cawsey et al.'s (2016) *Rate the Organization's Readiness for Change* questionnaire positions our organization in favourable state to advance with change.

While organizational change unfolds across multiple levels, it also involves change at the individual level. The micro level of change focuses on the means of managing the implementation process and the human component. It emphasizes the individual's adoption of change, reducing the resistance to change, considering organizational member's concerns, and communicating with the affected members. The impact of these changes on recipients must be considered to facilitate the transition to change implementation. Emotional, psychological, and ideological constructs risk being altered during the process, and I must understand what behaviours best facilitate the successful conversion of reform ideas into effective and practical organizational change. Bridges and Bridges (2009), found that resistance has a personal element linked to perceptions, actions, feelings, and thoughts of individuals affected by change. The threat to the status quo, the lack of sufficient knowledge and skills to participate in the change initiative, and exclusion from the change process are elements that might provoke resistance (Gaubatz & Ensminger, 2017). Team leaders will monitor the environment for warning signs and ensure that strategies are in place to address these issues.

Research suggests that failed organizational change initiatives range from one-third to as high as 80% of attempted change efforts (Higgs & Rowland, 2000; Kotter, 2008; Whelan-Berry & Somerville, 2009). Identifying and understanding key individuals who can influence change outcomes, appreciating their positions, and recognizing how to manage them and the context, is an approach that the executive team will use to build support for the change. Armenakis and Harris (2009) identify five change recipient beliefs that underlie their motives to support change: (a) discrepancy; (b) appropriateness; (c) efficacy; (d) principal support; and (e) valence. The executive team will implement strategies to respond appropriately to these beliefs that are built

into the *CPM* (Cawsey et al., 2016) during different phases or that are complimented by the transformational and adaptive leadership approaches (see Appendix G).

The stakeholder's readiness to act (see Figure 1) can be used by team leads to provide an overview of where individual organizational members are situated on the change readiness continuum, and guide change leaders in determining where to focus interventions. Change leaders can respond appropriately to challenges which might influence implementation by evaluating the macro, or organizational readiness for change and the micro, or preparing individual behaviour for change.

Stakeholder	Commitment profile (resistant, neutral, supportive or committed champion)	Predisposition to change (innovator, early adopter, early majority, late majority, late adopter, non- adopter)	Change Continuum: Stakeholder progression			
			Aware	Interested	Desiring Change	Taking Action
Stakeholder A						
Stakeholder B						

Figure 1. Analysis of stakeholder's readiness to take action. Adapted from *Organizational Change: An Action-Oriented Toolkit*. by T. Cawsey et al., 2016, Los Angeles, CA: Sage.

A combination of change drivers, events, behaviours or activities that facilitate the implementation of individual change will be incorporated during this stage of the change process. The district will provide skill development training for change, such as how to create and implement recruitment strategies, how to generate a rigorous candidate selection process, and how to produce effective interview questions and techniques. Principals will be equipped to assume mentoring and coaching approaches as they develop vice-principals with whom they work. Systems principals will design leadership development programs aligned with the organization's mission and vision, while assessing effectiveness with outcome measures centered on change.

Change drivers are designed to understand and decrease resistance embedded in change implementation and change leaders should understand how to leverage their influence in the change process. Valuing open dialogue during meetings, and offering opportunities to voice concerns while soliciting multidimensional perspectives about the change, I will welcome opinions, and use the knowledge to better understand change recipients' perceptions. These perspectives will be explored during various participatory leadership initiatives such as think tank activities, small group meetings, surveys, and written anonymous feedback that will allow for an examination of the change initiative from different angles, and will present possible solutions. Solicitation of feedback from department members, and involving change recipients in the decision-making increases self-worth, builds trust, and provides the change leader with valuable information that can be used during various change phases (Gaubatz et al., 2017). When legitimate concerns emerge, these opinions are considered when creating a contingency plan, as these opinions can offer guidance when implementation issues surface. Potential implementation challenges such as resistance, employee turnover, changes in funding models and Ministerial priorities can be problematic, however, contingency planning strategies can provide a method for addressing unexpected problems.

Two contingency planning tools are the *Decision Tree Analysis* and *Scenario Planning* (Cawsey et al., 2016), both of which will be developed by our transition facilitator in consultation with various implementation teams. The *Decision Tree* model is appropriate for the HR team as it aligns best with their approach. It considers major choices and possible consequences and risks of alternative pathways and a *Design Thinking* model can be applied to devise solutions. Teams plan for next possible actions in relation to these choices and in the event of an unplanned event, the team will have a secondary plan established. *Scenario Planning* is the

model that aligns with the pedagogical team methods which are more flexible. The backward planning design involves the creation of a limited number of scenarios around a strategic issue and future potential events to help identify blind spots that might impact the realization of the desired future state. As teams develop contingency plans, reassurance is reinforced, and they can move forward confidently with the proposed change.

Situational challenges will confront the change initiatives and they will be mitigated by my leadership ability to diagnose and assess emergent issues. Because adaptive leadership provides an opportunity for members to address change by taking risks, and to interrupt unproductive patterns (Heifetz, 1994), I will consciously integrate an adaptive leadership approach to situate issues within the broader context, and leverage distributed team expertise for the creation of potential solutions to existing or potential issues. Moreover, I will incorporate transformational leadership strategies which support the emergent change approach and align with Higgs and Rowland's (2005) leadership competencies. This will develop the capacity to change in others by providing individualized consideration.

Transition Management

The *Acceleration* Phase (Cawsey et al., 2016) includes developing plans for bridging the gap between the current and future state, and managing the transition between these two points while building support for change. The organization must continue functioning effectively while the planned changes take place in the background, and eventually surface to replace existing structures and processes. The Burke (2018), Kotter (1996) and PDSA models emphasize action planning and implementation while education and development are integrated into the system. Working with, and empowering key stakeholders such as the executive team, the human

resources department, principals, vice principals, and systems principals to achieve the envisioned future state, we will create collaborative structures and coalitions such as professional learning communities within the organization. Furthermore, networked learning communities with external districts, organizations, and strategic teams will provide alternative perspectives to engage our teams as change agents in action planning regarding different components such as succession planning, professional development, and recruitment and retention procedures (Dundar, Scott, & Scott, 2017). Traditionally accepted norms for leadership placement and development will be challenged and refocused around the organization's *raison d'être*. In addition, the HR department practices will readjust to adopt new hiring practices, a rigorous selection process, and a succession plan that will be updated yearly. In collaboration with the executive team, system, and school principals, HR will devise experience-specific training programs, grounded in adult learning theory to support systemic leadership development, as well as principal and vice principal professional development. Systemically developed principal preparation programs will incorporate mentorship and coaching training for experienced principals so that they can support vice principals and potential leaders with the skills to build capacity, ethical understandings, and requisite skills to foster trust in their settings.

This group-oriented approach involves change recipients in the diagnosis and remediation of organizational challenges and positively influences individual motivation to support change (Armenakis & Harris, 2009). While establishing the conditions conducive to a learning organization, such as a safe context for creativity and innovation, I will be involved on many levels as a model change leader who is receptive to individual needs, and open to the productive benefits of dissent. Observations, meeting debriefing information, and anonymous survey data will provide an ongoing assessment of reactions to organizational change. Change leaders will

anticipate, consider, and plan to influence organizational member's beliefs in pursuit of establishing a readiness for change, implementation support, and change commitment.

Building momentum is specific to this phase, and one way to achieve this is to concentrate on specific short, medium, and long term actions required to advance the implementation. The importance of employing effective guidance methods for the implementation and people's adoption of change cannot be overemphasized (Kang, 2012). Basic action planning tools will be used to detail the sequence of steps teams will take to achieve their goals. A *To Do* list is an initial orientation chart that will be replaced by more sophisticated tools. Another implementation tool is a *Responsibility Chart* (Cawsey et al., 2016) where decisions, actions, responsibilities, and timelines (see Figure 2) will be posted to support motivation and communication. These initial tools can shape efficacy beliefs as these early tasks are easily attainable, and they can be used to celebrate small wins and build momentum towards achieving the larger, desired future state (Armenakis et al., 2009).

Responsibility Chart						
Action or Decision to be Taken	Director of Education	Executive Team	Human Resources Team	System Principal Team	School Principal Team	Date
Action (1)						
Action (2)						

Figure 2. Responsibility chart for action planning. Adapted from *Organizational Change: An Action-Oriented Toolkit*. by T. Cawsey et al., 2016, Los Angeles, CA: Sage.

Another implementation tool that will be used to highlight benchmarks and key performance indicators, is a transparent collaborative project planning chart that provides timelines and schedules work. Microsoft Sharepoint® is a collaborative team software tool that our technology team can train our departments to use to effectively organize and track work flow. Once milestones are developed through the project planning process and goals are established,

these markers can be used to track progress and reinforce the initiative of others by recognizing their achievement (Cawsey et al., 2016). Bi-monthly progress report meetings will be held so that members of each team will be able to situate their piece of the change initiative into the larger, systemic change. As well, these meetings will celebrate the realization of goals and become a time for inter-departmental problem solving. Important supports and resources for implementation realization include additional costs for the salary of a temporary transition facilitator, and fees associated with travel and training and time for meetings. Furthermore, planning, communication and the production of recruitment strategies, interview formats, professional development models and their associated documentation, will be added expenses.

Institutionalisation, the final phase in the CPM (Cawsey et al., 2016) is when the change becomes part of organizational processes and where changes are monitored, progress measured, and change momentum maintained. Kaplan and Norton's (2000) *Strategy Map* and their *Balanced Scorecard* are two tools that support this stage, and will be discussed further in the following section that explores multiple balanced measures to gauge progress and mitigate risks.

Change is unpredictable and the FD must be flexible and able to adapt quickly by providing alternative solutions. Changes such as the recruitment plan, the interview process, and systemic leadership professional development will be reviewed regularly considering their impact on change outcomes, and modified accordingly. The team will create several contingency plans and alternative solutions to ensure that the path to change implementation is supported.

Change Implementation Plan: Strengths and Limitations

Using planning tools and frameworks to execute the change agenda can be beneficial as they create a visual path of the change route. The CPM (Cawsey et al., 2016) builds upon the

strengths of previous change models and supports adaptive, transformational and distributed leadership approaches, essential to learning organizations (see Appendix H). The *CPM* stages support other implementation frameworks such as Kotter's (1996) *Eight-Stage Process for Successful Organizational Transformation*, The Burke-Litwin (2018) *Causal Model of Organizational Performance and Change*, and the PDSA cycle of improvement. The CPM also uses Nadler and Tushman's model as a framework that strives to attain a balance between organizational components, and is built on the assumption that there are predictable change stages – beginning, middle, end. The CPM (Cawsey et al., 2016) offers a functionalist, structuralist approach, assuming an objective dimension to change. It has theoretical roots in deterministic nature of social science as the model emphasizes the criticality of an organization's external environment (Burke, 2018). The model accounts for larger system level dimensions by including group variables such as mission, strategy, leadership and culture with individual needs, values, skills, motivation and task requirements. Although the model seems one-dimensional, it accounts for change complexity, incorporating multiple effects and various influential and directional modes. The CPM provides clear steps that are accessible to change leaders who must recognize that change is complex, and that there is constant movement between the stages, hence, a need for flexibility.

Several assumptions about the implementation outcomes drive the rationale behind the proposed approach. One expectation is that the creation of a rigorous recruitment strategy will lead to an increased number of external principal candidates. As well, a thorough, transparent selection process will clarify expectations, elevate the status of the position within the organization, and provide the district with successful principals able to move their schools and the system forward as learning organizations. Ultimately, learning leaders will improve student

learning in their schools, and contribute to the creation of a meaningful, collaborative learning organization that promotes innovation, creativity, and embraces change. Another proposed solution, that of creating a leadership development program with a learning-organization oriented curriculum and structure, is built upon a hypothesis: The program, with a responsiveness to individual needs and skills, will improve organizational member's experiences within the organization and therefore, contribute to employee retention.

Some of the CPM limitations are remedied with the integration of alternative model steps or approaches. An area for development is that outside forces acting on organizational change should be given more consideration to the desired change initiative. The lack of focus on the influence of external forces upon an organizational change initiative is why elements of the *Burke-Litwin Causal Model* (Burke, 2018) approach are incorporated into the CPM. It is important to remain sensitive to the dynamic nature of organizations, and to the multiple levels of analysis when employing the CPM. An open-systems approach influences this model that considers the external forces acting on a proposed change initiative as the major driver and director toward the desired change. Finally, the CPM is a generalized model that does not account for French language education needs and the importance of the PAL, which is integral to French language education leaders. It is imperative that change leaders when using the model, consider the importance of links with the French community, the accessibility of limited resources, and the impact of learning within a minority context.

Monitoring and Evaluating the Change Process

Measurement and control processes are required as the change shifts from the planning to the implementation phase. What the organization measures impacts the direction, outcomes, and

content of a change initiative (Cawsey et al., 2016). The information collected from our *Strategy Map* and *Balanced Scorecard* (Kaplan & Norton, 2004), will guide first order change progress, influence corrections, and bring the change to a successful conclusion. As a change leader, I must identify assessment measures associated with the change, build them into the process, and adapt them into the tools our teams will use for decision making, communication, and acting (Kennerley, Neely, & Adams, 2003). These processes play a critical role in guiding change and integrating initiatives from multiple teams because they can enhance accountability, and clarify expected outcomes.

The PDSA model, *Plan, Do Study Act*, for improvement (Langley, Nolan, & Nolan, 1996) (see Appendix I), correlates with the various steps in the CPM, and provides a framework for developing, testing, and implementing changes leading to improvement. Based in scientific methodology, it moderates impulsive action-taking with analysis and reflection. The PDSA stages overlap and interlace with the CPM multiple times, and during different phases. The PDSA cycle revolves around key questions teams use iteratively to analyze the impact of their interventions such as: (1) What are we trying to accomplish?; (2) How will we know if the change is an improvement and what measures will we use?; and (3) What changes can we make in the next improvement cycle to achieve the desired results? The PDSA *Do* and *Study* stages integrate with the CPM's acceleration phase which focuses on monitoring and evaluating implementation strategies and actions in relation to the desired outcomes. Identifying specific departmental goals, and individual responsibilities engages and empowers multiple teams in the implementation. This is the foundation of the acceleration phase in which the *Do* piece of the cycle is embedded. Once teams have a clear direction and pre-implementation data is collected, initiatives are enacted and revised in during the *Study* stage. Tools, such as the *Strategy Map*

(Kaplan et al., 2004), and techniques, such as creating a risk-taking environment, and celebrating small gains, are fundamental for this phase as they build momentum and consolidate progress.

The *Plan*, *Do*, *Study* and *Act* stages integrate into the CPM's institutionalization phase where change is tracked periodically through multiple methods, and adjusted according to the desired outcomes. The *Study* phase incites change leaders to collect data in relation to the measurable outcomes determined in the *Plan* phase and collect the same data after implementation. The OIP's change implementation plan is multi-pronged and different teams will simultaneously employ the PDSA cycles to test out changes on a smaller scale (see Appendix J). The teams will build on their learning from the test cycles in a structured way before systemic implementation. This approach provides stakeholders the opportunity to validate the level of change success, and it is a powerful tool for learning from effective and ineffective ideas. Although each team has different objectives that will be measured at different times throughout the change process, they will independently contribute to the realization of the overarching organizational objective. The *Act* phase requires teams to integrate the learning throughout the process, to adjust as needed to objectives or targets, to formulate new theories or make changes to the overarching aim of the continuous work, and to modify implementation tools or processes. Professional learning communities will provide the forum for these reflections and adjustments and the executive team will combine information monthly from each department to assess overall organizational progress.

Measurement tools linked to indicators are required to answer the PDSA questions and each team will develop them while linking them to the overarching change plan. The executive team will use the *Strategy Map* (Kaplan et al., 2004) (see Appendix K) as a master organizer to

measure and track progress. It is a powerful organizational and communication tool that helps individuals visualize and understand proposed actions, where their team is situated, and how they contribute to the systemic outcomes. It provides focus and alignment, opportunities to measure and report progress, and helps change leaders identify the gaps in objectives and / or measures (Cawsey et al., 2016). The *Strategy Map* integrates the change objective with operational activities while highlighting cause and effect relationships between multiple perspectives, which is a useful instrument that increases the possibility of effective strategy implementation (Markiewicz, 2013).

While the *Strategy Map* links change strategies and outcomes of different teams, the *Balanced Scorecard* (Kaplan et al., 2004) (see Appendix L) provides teams the capacity to integrate measures critical to organizational success, and helps them adjust and mobilize alignment. Different team leads from the system principal group and the HR group can use the tool as a comprehensive strategy description to view measures as a series of cause and effect linkages among scorecard objectives. The FD's *Balanced Scorecard* is modified to align with the objectives of a non-profit, educational organization, and it eliminates the financial perspective. The three components readjust during the iterative process to capture district objectives as organizational leaders describe products and service attributes, and define how the organization differentiates itself from competitors to attract and retain potential leaders (see Appendix M). Once the district has evaluated potential leader perspectives, we will develop new recruitment strategies, succession planning initiatives, transparent processes, rigorous selection approaches, and leadership development programs that combine both research and perceptual survey information to respond to individuals needs and systemic requirements.

A metric that determine the effectiveness of the change implementation is the number of qualified and knowledgeable individuals that populate the principal and vice-principal bank. As well, the participation in leadership development programs can demonstrate an increase in the interest in leadership positions, and future potential. A recruitment strategy, succession plan, and tiered professional development program can be measured as existent or non-existent, but the quality of these initiatives will require a critical analysis and further investigation. Using professional development (PD) to catalyze change is a complex process, and there is not a linear association between professional development and increased student performance (Dundar, Scott & Scott, 2017). The monitoring of the PD can occur, especially with the creation of clear direction and measurable outcomes of the program (Guskey, 2000, 2016; Guskey & Sparks, 1991). Another change implementation progress indicator is the feedback loop attached to the perceptual surveys at the end of a leadership development program, or the mentoring or coaching experiences. A mixed-method approach will be used and will include semi-structured interviews, focus groups, and anonymized surveys to monitor and evaluate the changes being made to the leadership development programs. Rich quantitative and qualitative data will uncover multiple perspectives that inform the program evaluation assessments about leadership program quality. This information will guide our teams in refining the content and delivery modes for professional development.

Second order changes, which will take longer to materialize, will also be evaluated. Metrics to determine the degree to which the FD has become a learning organization include the assessment criteria established by Watkins and Marsick (1993, 1996; Marsick & Watkins, 1999, 2003). Organizations structured to promote continuous learning have a culture that provides (a) resources and tools for individual learning; (b) ensures dialogue and inquiry at all ranks; (c)

captures suggestions for change; (d) emphasizes team learning and collaboration to promote cross-unit learning; (e) empowers people to enact a collective vision; (f) creates systems to capture and share this learning; (g) makes systemic connections between the organization and its environment, scanning the environment to learn and anticipate future needs; and (h) provides leadership for learning through managers who know how to facilitate the development of their employees and who model learning.

The *Dimensions of the Learning Organization Questionnaire* (DLOQ) (Watkins & Marsick, 1997) (see Appendix N) includes leaders and constituents in perceptual feedback on leader and organizational performance. The survey, composed of 43 items, measures members' perceptions on seven dimensions of a learning culture and two measures of organization performance, consisting of 12 items. The instrument diagnoses factors that influence the overall adaptiveness of the organization and has been tested and modified through numerous research studies (Watkins & Dirani, 2013; Yang, Watkins & Marsick, 2004).

The DLOQ measures learning culture in organizations and captures employee perceptions to help the organization understand where they are versus where they need to be. According to Marsick and Watkins (2003), a learning organization has two components; the first represents the people who comprise an organization, and the second represents the structures and culture created by the organization's social institution. This framework ascertains that to move towards the desired outcome, an organization must work with people at the individual and group level, as well as create facilitative structures to support and capture learning (Watkins & Marsick, 1997; Yang, 2003), which supports the OIP's proposed change plan.

Communicating the Need for Change

Multiple levels of understanding in an organization can lead to confusion and impact the success of the change. It is essential to develop a shared understanding of the need for change, a clear concept of change actions, and individual roles within that change. The proposed communication plan considers individual and organizational needs, and it will propel the change forward as it: (1) creates the need for change within the organization; (2) empowers individuals to understand how the change will impact them; (3) explains structural or job modifications that alter modes of functioning within the organization; and (4) keeps individuals informed about change progress (Cawsey et al., 2016). Change related uncertainties are best addressed by different sources of communication (Allen, Nerina, Jimmieson, Bordia, & Irmer, 2007), and multiple communication strategies are intertwined throughout the different phases in the FD's change process, as the focus and purpose adapts at each step to meet the needs of different groups (see Figure 3).

Communication Needs for Different Phases in the Change Process			
Initiation Phase	Developing the Need for Change Phase	Midstream Change Phase	Confirming the Change Phase
Communication and engagement plans to initiate the change -Is there an approval process to initiate? -How is the change identified and who is responsible?	Communication and engagement plans to explain the need for change, provide a rationale, reassure stakeholders and clarify steps in the change process.	Communication and engagement plans inform stakeholders of progress and obtain feedback on attitudes and issues to challenge any misconceptions and clarify roles, structures and systems.	Communication and engagement plans to inform stakeholders of the success, to celebrate the change and to prepare the organization for the next change.

Figure 3. Communicating during different change phases. Adapted from “A Management Communications Strategy for Change,” by Klein, 1996, *Journal of Organizational Change*, 9(2), p. 37.

The communication strategy will be maintained throughout the duration of the change process, and address concerns and questions from various individuals and teams. It will also

consider who delivers what messages: Direct supervisors are the preferred sources of implementation-related and job-relevant information during change, while the executive team will provide more strategic, system-level information (Allen & al., 2007). During the *pre-change* phase (Cawsey et al., 2016), the executive team will concentrate on leveraging persuasive communication strategies to generate pre-change approval. Who delivers the information, the timing, and the way it is shared with various audiences, are elements as important as carefully delivering clear messages. The executive team will meet face to face with system principals and HR directors to share multiple data sources, link them to strategic planning and organizational goals, and provide critical questioning that will lead teams to an analysis that establish an awareness for the need for change. A “notice and wonder” protocol for data analysis (see Appendix O) will be used as it is a simple and effective tool that offers a nonthreatening way for teams to view data and share observations. The following questions, reviewed by FD’s Comité de recherche (CR), or research ethics board, adhere to ethical standards, and will guide the initial inquiry:

1. How many principals will retire in the next 5 years?
2. Does a principal or vice-principal job pool exist? How many candidates are in the pool?
3. What leadership development programs exist in the in organization? How do they respond to individual needs, experiences and knowledge?
4. What is the recruitment strategy and how does this impact the principal pool?
5. What is the organization’s succession plan?

6. How does this impact our capacity to recruit, hire and train qualified, knowledgeable candidates?

The data analysis will allow the team to develop conclusions illustrating the scarcity of qualified, skilled, and engaged Francophone leaders, willing to assume positions of responsibility in the organization. The need for change will be obvious as the succession challenge will be exposed. A follow-up in person meeting with the same teams will focus on refining the vision for change, and delimitating concrete steps in the plan to achieve that change: What must the FD do to recruit, develop and retain learning leaders to lead our schools? Each department has a responsibility to contribute to the solutions, and they must be able to share this message with their teams. The executive team will assist this tier of organizational members to carefully construct harmonious messages that will impel the next group of individuals to understand the severity of this situation, and the importance of their roles in remedying the current state. The change initiative will spread as individuals have a solid understanding of the common change language, change objectives, and steps to share with their subsequent teams. The messages will be reviewed frequently during meetings and through written communications to reinforce a common understanding and accuracy.

The next phase is developing the need for change in which teams will use the information obtained in previous meetings to expand their influence and explain the rationale for change in a compelling way (Cawsey et al., 2016). Using persuasive communication strategies and influential tactics, team leaders will oversee departmental meetings in person in which they share results to create a sense of urgency and enthusiasm as they demonstrate the gap between the desired future state and the existing reality. The change vision will be clearly articulated and the

specific steps in the change plan will be reinforced by providing visual organizers, timelines and tasks that will be available in the organization's shared *Microsoft Teams*® software. Individual responsibilities, meeting notes, informal chats, and visual organizers will be housed in a central location, the team folder, making information accessible to members. Team meetings will reference each team's visual organizers, such as the *Strategy Map* and the *Balanced Scorecard* (Kaplan & Norton, 2004) to chart the change and monitor progress. Reassurance and support is critical in this phase, and change leadership team leads will explain that organizational conditions will evolve to support the transition. Change recipients must be active participants in the change efforts (Armenakis & Harris, 2009) and therefore training and exploratory, innovative risk-taking environments will serve as background reinforcements for the change. Furthermore, a two-way communication forum will surface in which individuals can share their concerns anonymously and in person during focused meetings, by email or feedback forms.

The midstream change phase occurs as the change progresses and we will concentrate on transmitting specific information relating to how the change will occur, how it will translate into concrete terms, and how this will influence organizational operations. We will optimize the position of our team leads as they deliver consistent messages to their departments and teams. Questions will arise from different organizational members for example:

1. How will this change initiative impact me?
2. Why is this change important?
3. What are the responsibilities of other teams?
4. How does this change fit into the organizational purpose, mission and vision?

Team leads must anticipate a multitude of questions and respond reassuringly and appropriately, in alignment with the district's discourse. The immediate supervisor plays a key role in delivering the messages and guiding individuals through the process as the level of trust and understanding between an employee and a supervisor is high (Klein, 1996). Because most individuals will question how the change will impact their position and transform their jobs, individual meetings between supervisors and individuals will clarify these concerns.

The content of change must be managed during this phase and obsolete policies, procedures, and directives will be collectively revised to reflect the change vision. Various teams will create new procedures such as interview processes, the criteria for hiring, and leadership training programs centering on creating the context for distributed leadership, and developing principals who encourage organizational learning. Multiple levers for change such as crafting mission statements, providing training and development, creating corporate standards and reinforcing leadership behaviours that manifest these values, are important steps that will be integrated to support this communication phase. New structures, roles and systems will be communicated several times in different forums, such as in meetings, in the employee portal, and during our Director of Education's monthly communication newsletter. Superintendents will remain optimistic about the change, emphasize the message, and incorporate it into formal school visits and the narrative that occurs with trustees and other organizational members. The communication department will leverage digital opportunities such as the district's employee portal, and *Twitter* to provide weekly updates, highlight progress, and celebrate milestones. Key organizational figures, will offer personal recognition during meetings or district gatherings to maintain the change momentum. Immediate supervisors will open two-way communication channels such as organizational Web forums, and anonymous online surveys that will promote

and encourage feedback loops that allow questioning, and uncover how individuals are experiencing the change. Individual, personalized check-in's will also contribute to the overall communication strategy that strives to reduce uncertainty, ambivalence and resistance to change.

The final step in the communication plan for this change initiative is to confirm the change phase (Cawsey et al., 2016). This step aligns with a transformational leadership approach and specifically, individualized consideration, where progress and contributions are celebrated which reinforces commitment and reduces stress. The change process will be discussed as change leaders consult their teams to obtain feedback that will inform next steps and rectify challenges. This information gathering process will help leaders refine their approach and address concerns that may inhibit the change initiative. Although change is never finished, the executive team will lead reflective learning sessions in which the district will assess successful strategies, and consider improvements for the next change cycle.

Change leaders should consider that strategic communication interventions must be suitable for the situation, and the desired effect upon the recipient. As well, the communication challenge must be aligned with the communication means, or the channel (Cawsey et al., 2016). A diversity of communication channels will be employed at various times throughout the change since each one has a unique impact upon the message receptor. Reports, emails, personalized letters, video conferencing, *Google Meets*®, in person group meetings and individual meetings represent a spectrum of communication forums. As the situation becomes increasingly complex, tense, or personally relevant to the change recipient, the communication method must be increased substantially to limit ambiguity and to reinforce assurance (Cawsey et al., 2016). Depending on the intensity of the meeting, several follow-up meetings might be required in

addition to a written document with detailed information that solidifies the content of the meeting topics and essential points. These types of meetings will occur with individuals in the HR department, as their roles will alter during this change. School principal roles will be modified as they assume formal mentoring and coaching functions for the vice principals with whom they lead schools. These shifts will require repetitive communications in various formats as well as support to assist these individuals to effectively assume their roles.

Adaptive leadership focuses on the adaptations required of people in response to changing environments and I will purposefully engage in meetings and exchanges with this framework as the platform for supporting individuals. Adaptive leadership encourages effective change across multiple levels, and I will mobilize, motivate, organize and orient others using communication strategies responsive to situational and individual needs. As well, the holding environment's communication conditions such as productive collaborative norms, will be structured to encourage learning and creativity. The adaptive work emerges from the complex transactions and communications between the leader and organizational individuals and in-person meetings, are appropriate for these interventions. My organizational position requires two direct lines of frequent communication: (1) with my colleagues at the executive district table; and (2) with system principals and six school principals. Most of the adaptive work will take place in person with the system principals and with school principals as I have direct influence with these groups. I will collaborate with the system principal team in a small group format as we develop a continuum of leadership development programs across the district. An individual approach with school principals is most appropriate as their roles will shift and this may cause a destabilizing impact, which I must consider when helping them adapt to the change.

In line with Klein's (1996) communication for change principles, we will reiterate our vision and the strategies designed to meet our objectives verbally, in writing, through social media and on our employee portal because communicating and repeating the message in multiple ways increases retention and meaningfulness. Kang (2015) illustrates how different individuals can interpret the same terms and concepts differently, and that term confusion can hinder change initiative progress. In such, our departmental teams will review change language such as leadership capacities, effective work skills and concepts such as application procedures, to harmonize terminology, and ensure the organization demonstrates coherency. Optimizing face to face interactions will be a priority, especially during crucial change phases as this increases the engagement of both parties and decreases miscommunication probability (Cawsey et al., 2016).

Influencing Change

In addition to employing a communication strategy, we will draw on push and pull tactics which have different approaches to influence organizational members to adopt the change. The tactics will enrich different communication phases to present a stronger case for change, and a driver for organizational members to adopt the change. The initiation and developing the need for change phases of the communication strategy will rely on persuasive techniques grounded in facts and logic to demonstrate an urgency for change. The absence of qualified, knowledgeable and skilled leaders, the projected retirement rate of acting principals and the non-existence of recruitment strategies should be sufficient evidence to highlight the critical state and thus, the need for change. Alternatively, push tactics can provoke resistance therefore, pull tactics will also be employed (Cawsey et al., 2016). The transformational leadership approach strengthens pull tactics that rely on inspirational appeals and consultation (Falbe & Yukl, 1992). Inspirational

motivation, an element of the transformational leadership approach (Northouse, 2016), will coalesce around my capacities as a change leader to articulate a vision that is appealing and inspiring to followers. I will challenge followers in multiple forums with high standards, communicate optimism about future goals, and provide the significance of each change action. Drawing on the moral imperative of educational leadership (Fullan, 2003), I will demonstrate the importance of having great learning leaders in each of our schools not only for our students, but for the survival of Francophone language and culture. This change initiative is designed to ensure that French language education in Ontario will have a promising future. Providing purpose for followers by explaining their roles within the change will motivate them and provide the energy that drives a group forward. The visionary aspects of my leadership will be supported by my communication skills that will make the vision understandable, precise, powerful and engaging. Embedded in pull tactics, is the ability to inspire appeals to arouse enthusiasm and to use consultations strategies to promote individual's self-worth and positive self-efficacy, which are directly linked to transformational leadership.

The *Midstream* communication phase (Cawsey et al., 2016) seeks to obtain feedback on attitudes and issues to challenge any misconceptions and clarify new organization roles, structure and systems. In addition to the two-way communication efforts that provide a feedback loop during different phases of the change initiative, I will actively support the input of various organizational members to question, critique, and develop sections of the final change vision such as the recruitment strategy, the interview process, and the selection criteria for the leadership development programs. These approaches are designed to instill in individuals the willingness to invest more effort in their tasks, to promote self-efficacy and an encouragement and optimism about the future. Falbe and Yukl (1992) demonstrate that the most effective pull

tactics are: (1) inspirational appeals; and (2) consultations, which are facets of the transformational leadership approach, and the actions provided in the previous section. These strategies in combination with a clear communication plan which are compatible with the leadership approaches I will adopt, will motivate organizational members to favorably adopt the change.

Conclusion

A significant shortage of qualified, skilled and experienced leaders willing to assume principal leadership positions has left the FD in a precarious state. Although multiple factors contribute to the PoP, Bolman & Deal's (2013) four frames approach has provided a lens for the examination of this organizational challenge from different angles. Upon the discovery of the dynamics that facilitate the PoP, multiple approaches attempt to rectify the issue using a combination of adaptive (Heifetz, et al., 2009), transformational (Kouzes & Posner, 2012) and distributed (Northouse, 2016) leadership approaches to resolve the gap between reality and a desired future state. Ideally, the FD would like to situate itself in a position where there is an abundance of leaders that can lead learning organizations. Some solutions that may contribute to the realization of these objectives include the creation of an aggressive recruitment strategy, a rigorous selections process, a succession plan, and the creation of principal candidate banks to provide a reserve of leaders to create learning organizations that will benefit student learning and well-being. In addition to externally recruiting individuals, the district will support the creation of a leadership development continuum, where PD will offer support and learning for our present and future leaders, based on their leadership profile.

Understanding change as non-linear, the OIP's leadership framework is immersed in complexity theory (Stacey, 2003) and open-systems theory (Burke, 2018), where individuals are part of the change process. The anticipated use of a hybrid change model incorporating Cawsey et al.'s, (2016), Senge's (1990), and Burke's (2018) approaches will provide clear leadership direction, and solidify the leader's change direction. Furthermore, individuals as key components of the organization, will be involved in change at every level, as this will reduce resistance and promote the change throughout the organization. A clear communications strategy, Kaplan and Norton's (2004) monitoring tools, and evaluative program models, will contribute positively to the momentum of change implementation that will address the problem of practice. Change is complex, continuous, and unpredictable. The hope is that our organization will secure its existence and prepare future French language educational leaders with the skills and competencies that are favorable to maneuvering change in an evolving world.

Future Considerations

There are several next steps that must be implemented to ensure the continuation of this OIP such as the ongoing monitoring of the implemented solutions, an attention to current research, the integration of relevant findings into the solutions, and the need to continuously prepare organizational members for change. The organization must concentrate on maintaining a focus on developing a learning organization and ensure that structures and processes infuse this philosophy into their essence. Furthermore, attention to ongoing recent research in principal and vice-principal capacity profiles are required to ensure that recruitment, hiring and development in the district align with these requirements.

In addition to filling vacant positions and creating a pool of potential leaders, the FD's next step is to reach beyond the immediate, and proactively create the conditions that facilitate the desired state. This requires expanding leadership programs beyond the scope of principal roles in the system, and tying them to strategic planning, organized around the concepts of Senge's (1996) organizational learning. A continuum of leadership development programs must reach beyond developing principals and vice principals, and be available for organizational members that are in line with their desired career paths and experience, such as aspiring leaders, emerging leaders, system leaders, and experienced system leaders. Furthermore, the selections process for admission into the programs must be refined to reflect positional success indicators that are linked to criteria that define the positions. French-language principals that work within the Catholic education system are expected to be active members of their communities and churches. Aspiring leaders who submit their candidacy for an interview, must demonstrate their involvement by providing references and a portfolio of evidence and this information must be considered when selecting candidates for leadership positions. The programs must be aligned with strategic planning, and harmonized with hiring processes and procedures.

Another area that requires further development is the leadership evaluation process and the link to personal development plans. The organization must revise the evaluation process and professional improvement plans to incorporate elements and indicators that are reflective of the leaders we hope to recruit. When individuals are undergoing performance appraisals, principals must be able to determine leadership potential and inform candidates on how to perfect leadership skills. Furthermore, principals must be equipped to properly mentor and coach vice-principals for them to effectively assume organizational leadership positions within the district.

Finally, there must be additional research regarding French language principals and vice principals working in French language schools within minority contexts. The reality and the challenges French language districts experience are distinct from English districts, and vaguely captured in current research.

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Appendix A

Organizational Readiness for Change

The purpose of this tool is to raise awareness concerning readiness for change. The district's results are in parentheses and are in blue (district results).

Instructions for scoring: Using the change initiative or process, consider the questions in the following chart. If the response is “yes”, apply the corresponding score (+1, -1, etc.). If the response is “no”, apply a score of “0”.

Readiness Score: If a district scores below a rating of 10, it is not likely ready for sustained change and the change will be difficult. The higher the score, the more ready the organization is for change. Use the scores to focus attention on areas that need strengthening in order to improve the readiness.

Previous Change Experiences

<i>Readiness Dimensions</i>	<i>Readiness Score</i>
1. Has the district had generally positive experiences with change?	If yes, score +1 (+1)
2. Has the district had recent experiences where the change initiative was not sustainable?	If yes, score -1
3. What is the mood of the district: negative and cynical?	Score -2 (-2)
4. What is the mood of the district: upbeat and positive?	Score +1
5. Does the district appear to be resting on its laurels?	Score -1

Senior Leadership Team Involvement/Support

<i>Readiness Dimensions</i>	<i>Readiness Score</i>
6. Do all staff view the senior staff team as supporting/sponsoring the change?	Score +2 (+2)
7. Is there a clear picture of the future?	Score +1 (+1)
8. Is executive success dependent on the change occurring?	Score +1 (+1)

9. Has the leadership team ever demonstrated a lack of support during prior change initiatives?	Score -1
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Credible Leadership and Change Champions

<i>Readiness Dimensions</i>	<i>Readiness Score</i>
10. Is there a level of trust between senior leadership teams and staff?	Score +1 (+1)
11. Are senior leadership teams able to credibly show others how to achieve their collective goals?	Score +1 (+1)
12. Are senior leadership teams able to credibly work with and learn with others to achieve the collective goals?	Score +1 (+2)
13. Is the district able to attract and retain capable and respected change champions?	Score +2 (+2)
14. Are senior leaders likely to view the proposed change as generally appropriate for the district?	Score +2 (+2)
15. Will the proposed change be viewed as needed by senior leadership?	Score +2 (+2)

Openness to Change

<i>Readiness Dimensions</i>	<i>Readiness Score</i>
16. Does the district have scanning mechanisms to monitor the environment?	Score +1
17. Is there a culture of scanning and paying attention to those scans?	Score +1
18. Does the district have the ability to focus on root causes and recognize interdependencies both inside and outside the district?	Score +1 (+1)
19. Does “turf” protection exist in the district?	Score -1
20. Are senior leaders locked into the use of past strategies, approaches and solutions?	Score -1
21. Are employees able to constructively voice their concerns or support?	Score +1 (+1)
22. Is conflict dealt with openly with a focus on resolution?	Score +1
23. Is conflict suppressed and smoothed over?	Score -1(-1)

24. Does the district have a culture that is innovative and encourages innovative activities?	Score +1 (+1)
25. Does the district have communication channels that work effectively in all directions?	Score +1
26. Will the proposed change be viewed as generally appropriate?	Score +2 (+2)
27. Will the proposed change be viewed as needed by those not in senior leadership roles?	Score +2 (+2)
28. Do staff who will be affected believe they have the energy needed to undertake the change?	Score +2 (+2)
29. Do staff who will be affected believe there will be access to sufficient resources to support the change?	Score +2 (+2)

Rewards for Change

<i>Readiness Dimensions</i>	<i>Readiness Score</i>
30. Is innovative thinking acknowledged and valued throughout all staff groups within the district?	Score +1 (+1)
31. Do short term results become the primary focus more often than long term results?	Score -1
32. Are people censured for attempting change and failing?	Score -1

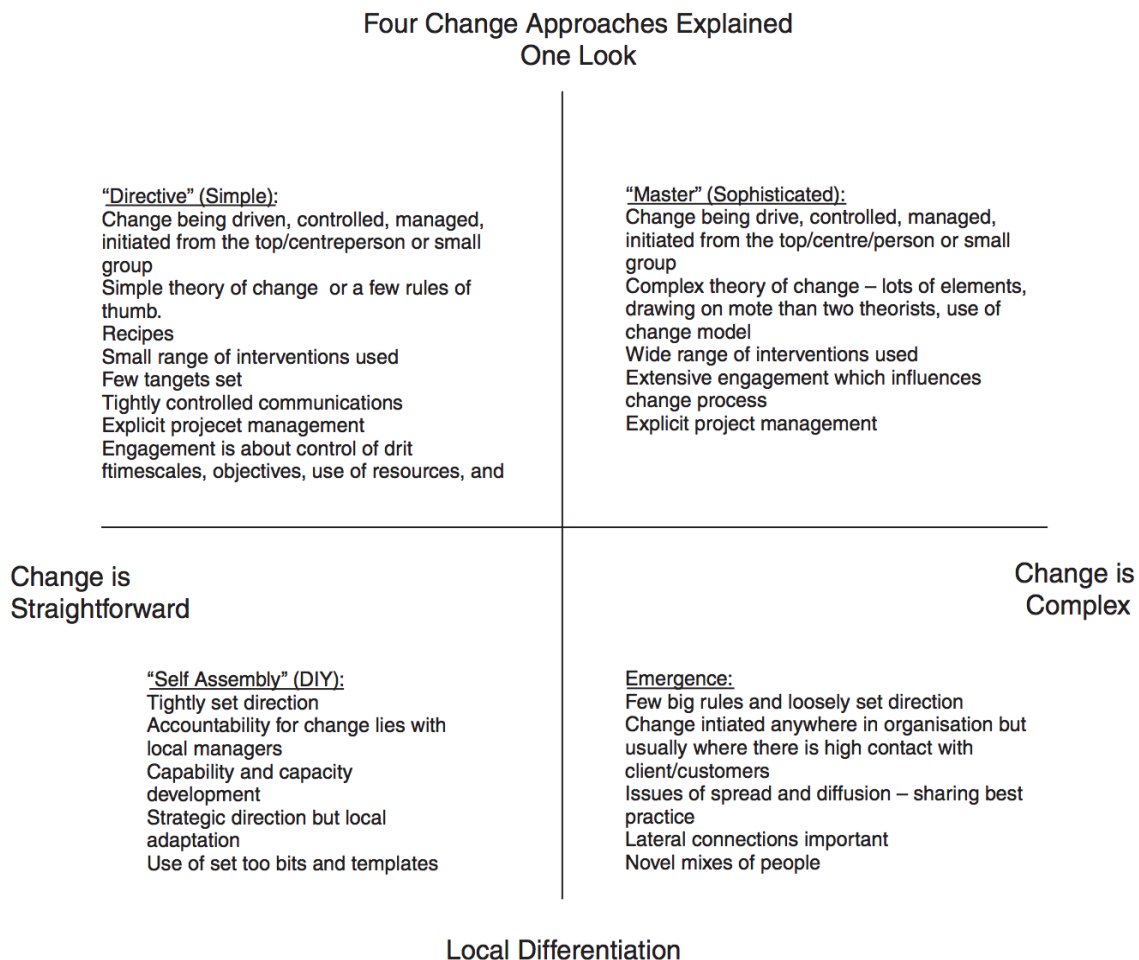
Measures for Change and Accountability

<i>Readiness Dimensions</i>	<i>Readiness Score</i>
33. Are there valuable measures/processes available for assessing the need for change and tracking progress?	Score +1 (+1)
34. Does the district attend to all the data that it collects?	Score +1 (+1)
35. Does the district measure/analyze student, parent and community feedback?	Score +1 (+1)
36. Is the district able to carefully steward resources and successfully meet predetermined deadlines?	Score +1 (+1)
	Total score: 28

Adapted from Cawsey, T., Deszca, G., & Ingols, C. (2016). *Organizational change: An action oriented toolkit*. Los Angeles, CA: Sage, pp.108-110.

Appendix B

Higgs & Rowland's Change Quadrant



Adapted from: Higgs & Rowland (2005). Building change leadership capability: The quest for change competence. *Journal of Change Management*, 1(2), 116-130.

Appendix C

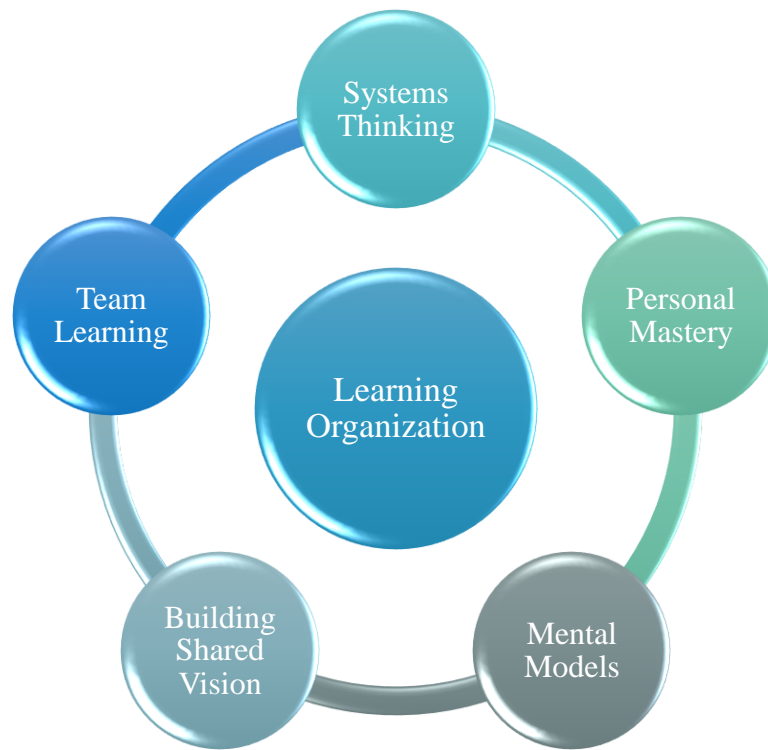
The Change Path Model



Adapted from: Cawsey et al., (2016). *Organizational Change: An action-oriented toolkit*. Los Angeles, CA: SAGE.

Appendix D

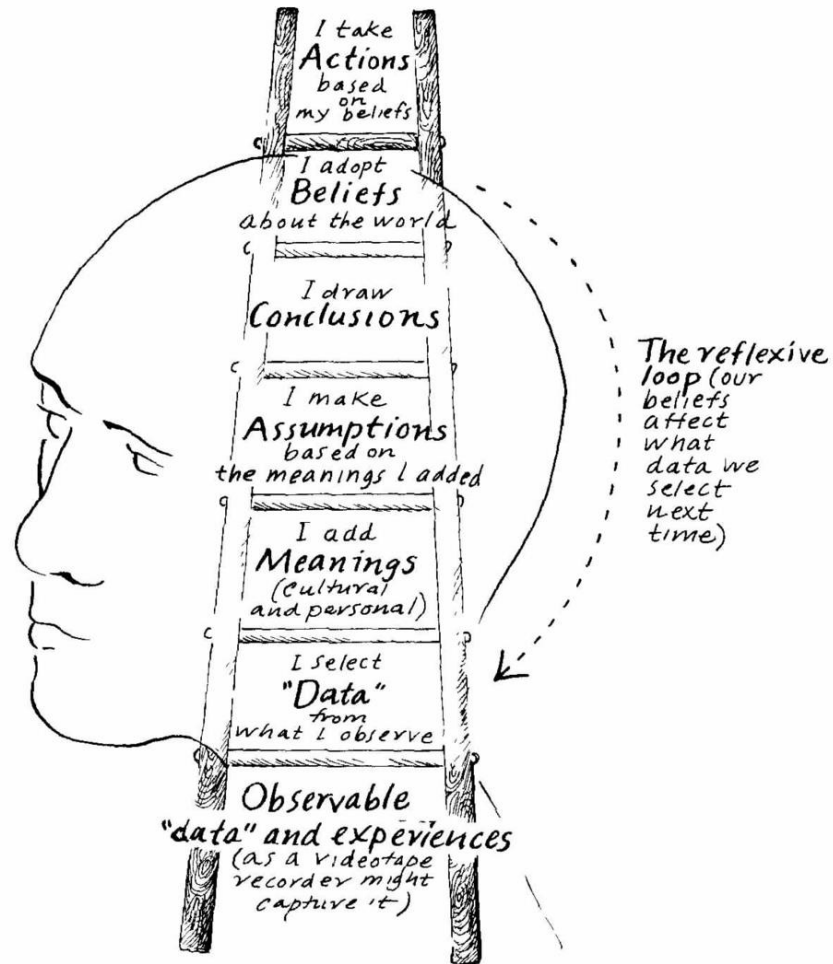
The Learning Organization



Adapted from Senge, P. (1990). *The fifth discipline: The art & practice of the learning organization*. New York, NY: Doubleday.

Appendix E

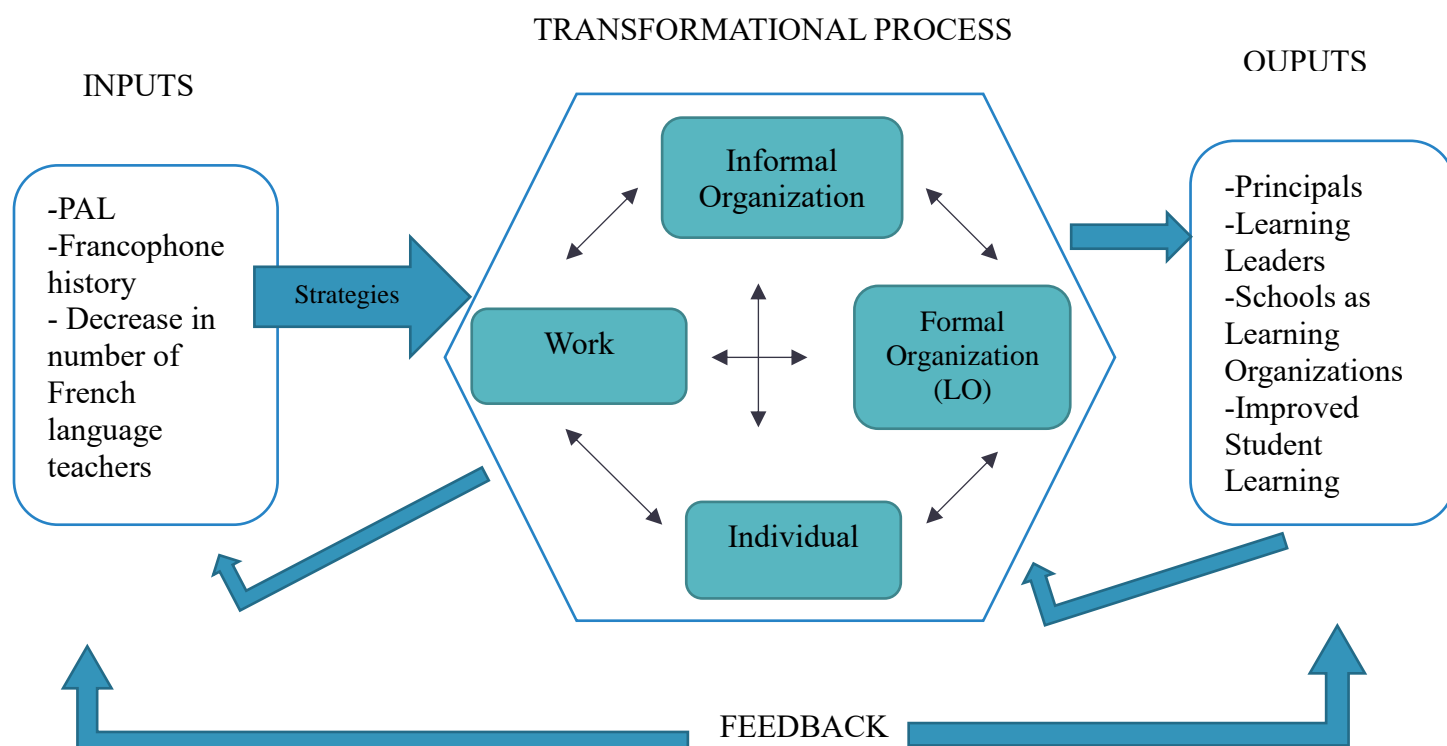
The Ladder of Inference



Reprinted from: Senge, P., Kleiner, A., Ross, R., & Smith, B. (1994). *The fifth discipline fieldbook: Strategies and tools for building a learning organization*. New York, NY: Random House, p. 243.

Appendix F

Congruence Model for Organizational Analysis



Adapted from: Nadler, D. & Tushman, M. (1980). A model for diagnosing organizational behavior. *Organizational Dynamics*, 9(2), 35-51.

Appendix G

Armenakis et al.'s (2009) Five Key Change Beliefs Aligned with the CPM and Leadership Approaches

Change Recipient Belief (Armenakis et al., 2009)	Definition	CPM Phase (Cawsey et al., 2016)	Organizational Strategies Linked to Transformational and Adaptive Leadership Approaches
Discrepancy	Belief that a change is required.	Awakening	<ul style="list-style-type: none"> -Identify the need for change. -Articulate the gap between current state and desired future state and share findings with organizational members. -Collaboratively develop vision for change. -Promote the vision and explain why it is needed.
Appropriateness	Belief that the change is designed to address the discrepancy and that it is the correct approach, initiative or action.	Mobilization	<ul style="list-style-type: none"> -Make sense of the change through formal systems and structures by brainstorming and problem solving with different teams and departments. -Build coalitions and strategically selected people in key positions who will support the change. -Communicate with, and manage recipients and stakeholders as they react and move toward the change. -Use different methods of communication such as Memos, emails, in-person meetings, for different circumstances and effects. -Listen and consider change recipients' concerns and ideas with anonymous surveys, focus groups, and meetings.

Efficacy	Belief that the change recipient and the organization can successfully implement the change.	Acceleration	<p>-Engage and empower others in supporting, planning, and implementation. Use adaptive leadership strategies to support individuals. Distribute leadership and decision making horizontally.</p> <p>-Help individuals develop new skills and knowledge to advance the change. Adaptive leadership strategies can be employed to help individuals overcome the challenges they face. Provide training for HR on hiring strategies, invite outside experts for succession planning, offer professional learning opportunities for those creating the leadership development plans.</p> <p>-Transformational leadership: Celebrate small wins by having regular update meetings and using charts to track progress. Even if an event was not considered successful, celebrate the knowledge obtained from the experience.</p>
Principal Support	Belief that formal leaders (vertical change agents) are committed to the success of the change.	Ongoing throughout the phases	<p>-Change leaders and teams are authentically engaged in the change movement, which is a component of transformational leadership. The Director of Education, superintendents, and system principals deliver persuasive speeches and are active in the change steps. We collaborate with teams and are involved in the work.</p> <p>-The executive team demonstrates the actions they want others to model.</p>

Valence	Belief that the change is beneficial to the change recipient.	Institutionalization	-The recipient is involved in the process from the outset, and values the change. -Track change and reward those who assist creating the change. This personal and/or professional accomplishment aligns with concepts of transformational leadership.
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Adapted from Armenakis, A., A., & Harris, S. G. (2009). Reflections: our journey in organizational change research and practice. *Journal of Change Management*, 9(2), 127-147, and from Cawsey, T., Deszca, G., & Ingols, C. (2016). *Organizational change: An action-oriented toolkit*. Los Angeles, CA: Sage.

Appendix H

Change Implementation Plan Aligned with other Frameworks

Change Implementation Plan (Cawsey, Deszca, & Ingols, 2016)	Implementation Plan Correlation	Implementation Plan Correlation	Implementation Plan Correlation	Implementation Actions
The CPM (Cawsey, et al., 2016)	The Burke-Litwin Causal Model of Organization Performance and Change (Burke, 2018)	Deming Cycle (1950) or the PDSA cycle: Plan, Do, Study, Act Cycle	Kotter's Eight-Stage Process for Successful Organizational Transformation (1996)	Actionable Steps
<p><i>Awakening</i></p> <p>Determine the need for change and the nature of change.</p> <p>1) Confirm the problems or opportunities that incite the need for change (data collection).</p>	<p><i>Prelaunch Phase</i></p> <p><i>Prelaunch:</i> Leader self-examination (self-awareness: motives, values), -scanning the external environment (gather information from the external and internal environment).</p>	<p><i>Plan</i></p> <p><i>Plan:</i> Define the problem and establish objectives.</p>	<p>Establish a sense of urgency.</p>	<p>1) Collect preliminary internal and external data and multiple perspectives to validate the need for change.</p> <p>-Scan the environment (internal and external).</p> <p>-Review organizational history and culture, strategic planning and mission.</p> <p>-Use Bolman and Deal's (2013) framework to analyse problem of practice.</p>

2) Articulate the gap in performance between the present and envisioned future state and spread awareness around the organization.	<i>Prelaunch:</i> Establish the need for change.	<i>Plan:</i> Define the problem and establish objectives.	Establish a sense of urgency.	2) Use gap analysis to describe what needs to change. - Clarify goals and measures to achieve targeted performance. - Uncover multiple perspectives and employ different levels of analysis to move away from simple, rational cause-and-effect approach.
3) Develop a vision for change.	<i>Prelaunch:</i> Provide clarity of vision and direction.	<i>Do:</i> Identify strategies and timelines.	Develop a vision and strategy.	3) Create a powerful argument that demonstrates the need for change is real and important (develop an awareness of the need for change). -Establish a vision while engaging a broad spectrum of organizational members in the vision framing process. -Use Nadler and Tushman's Congruence Model to diagnose change needs. -Assess the organization's readiness for change.

<p>4) Disseminate the vision for change and its necessity through multiple communication pathways.</p> <p>-Change Process Communication Plan: Prechange Phase: Communication plans to sell top management (Cawsey et al., 2016).</p>	<p><i>Launch Phase</i></p> <p><i>Launch:</i> Communicate the need: Deliver consistent message.</p>		<p>Communicate the change vision.</p>	<p>4) Share the results of the data collection and analysis and collectively engage others in developing an awareness for the need for change.</p> <p>-Clearly articulate the vision, objectives and the strategies that will help achieve the goals.</p> <p>-Education strategy to help others understand the change initiative, why it is important and what is required of them.</p>
<p><i>Mobilization</i></p> <p>Identify the distance between the desired future state and the present state:</p> <p>5) Make sense of the change through formal systems and structures and leverage those systems to reach the change vision.</p>		<p><i>Do:</i> Identify strategies and timelines.</p>		<p>5) Determine the type of change required: evolutionary, incremental or revolutionary, strategic change?</p> <p>-Understand the formal and informal systems and structures and how they can help move the strategies forward.</p>
<p>6) Assess power and culture dynamics and build coalitions to support the</p>	<p><i>Launch:</i> Initial key activities: capture the focus, create the reality of the change effort (launch</p>		<p>Create a guiding coalition.</p>	<p>6) Recruit members who have the knowledge, skills and influence to catalyse the</p>

realization of change.	programs, training, team building and mobilization, feedback processes, develop strategies for implementation).			change initiative and to support implementation. -Build collaborative teams and get people involved. -Identify stakeholder and systems that might resist change and anticipate actions to counter their resistance. -Analyze responses to change (be aware of how constituents see themselves – as gaining from the change, or not) and adapt to help people through the change.
7) Communicate the need to change organization-wide and to stakeholders. -Change Process Communication Plan: Develop the need for change (Cawsey et al., 2016).	<i>Launch:</i> Dealing with resistance: Change leader must be aware of consequences of change on individuals, groups and the larger system, recognize the type of resistance, and respond to their needs.			7) Keep people involved in change decisions, keep people informed, two-way communication, allow for mistakes. -Communicate plans, the need for change, provide a rationale, reassure employees and clarify change process steps.
8) Leverage change agent personality,				8) Facilitate the change.

knowledge, skills, and abilities.				-Create change teams, distributed leadership, PLCs. -Organize teams to reduce the impact of negative members. -Provide guidance and supports to adapt to the change.
<i>Acceleration</i> Develop plans for bridging the gap between the current and future state and how this transition will be managed (action planning and implementation) 9) Systematically reach out to engage and empower others in support, planning and implementation of the change. Help them develop needed new knowledge, skills, abilities and ways of thinking that will support the change. -Midstream Change Phase (Cawsey et al.,	<i>Postlaunch Phase</i> <i>Postlaunch:</i> Further Implementation: use multiple leverage systems (process reengineering, develop new processes, training and development). -Take the Heat, be consistent persevere and repeat the message (mission and vision).	<i>Do</i> <i>Do:</i> Implementation of the initiative, tool, process or change and collection of data for the measurement for improvement. -Accelerate improvement through networked communities.	Empower broad-based action.	9) Engage others in action planning and implementation. -Develop a plan of action (be open and transparent) and use to-do lists, responsibility charting, contingency planning, scenario planning. -Actively listen (use survey feedback) and provide feedback, mutual development and renewal. -Build networks, be explicit (goals, outcomes,

2016): Communicate the change progress, obtain feedback on attitudes and issues to challenge any misconceptions, and clarify new organizational roles, structures and systems.				expectations) about the need to change. -Work with multi-disciplinary teams to develop a leadership strategy, an in-service professional development approach, a succession plan, and a recruitment tactic.
10) Use tools and techniques to build momentum, accelerate and consolidate progress. (Measure progress throughout)		<i>Study:</i> Investigate the Data.	Consolidate gains and produce more change.	10) Nurture and leverage employee energy: innovation comes from freedom, not control. -Create an atmosphere that allows for mistakes. -Leaders engage in action, learning, reaction cycles and become involved. -Examine collected data and consider if the targets are met. -Highlight and reward progress.
11) Manage the transition, celebrate small wins and the achievement of milestones along the larger, difficult path of change.			Generate short-term wins.	11) Incorporate a change transition team to facilitate the process. -Change leader remains excited about change and communicates enthusiasm often.

				- Examine data and share results (are we meeting our targets), successes and challenges. –Recognize milestones using multiple forums: (social media, blogs, websites, powerful face-to-face communications)
<i>Institutionalization</i> Transformation of the change into organizational processes. Consider how to measure change (where the organization is and the level of success achieved). 12) Track the change periodically and through multiple measures to assess what is needed, gauge progress toward the goal, make modifications, mitigate risks.	<i>Sustaining the Change Phase</i> <i>Sustaining the Change:</i> -Unanticipated Consequences (realize that the change process is not linear), try to re-establish new forms and solutions for reaching an equilibrium. -Managing momentum (maintain the change and continue to be adaptable to future changes). -Monitor external environment. -Choose Successors	<i>Study</i> <i>Study:</i> Investigate the Data. <i>Act:</i> Determine Next Steps. Integrate all the learning throughout the process, adjust as needed to objectives or targets. Formulate new theories or make changes to the overarching aim of the continuous work and modify implementation tools or processes.		12) Track the progress at different intervals of the change process (before, during, after). –Succession plan in place and revised every 3 years. -Program Evaluation of Professional Development, of coaching and mentoring initiatives. -Perceptual survey data information from in-service

				<p>principals and vice-principals (what are their needs).</p> <p>-Correlate school profile data such as EQAO results and principal profile performance reports, related impact on staff transfers, student success data, etc.</p> <p>-Monitor recruitment strategies and the anticipation of vacant leadership (principal and vice-principal) positions quarterly.</p> <p>-Revision of interview procedures and processes to reflect organizational and strategic objectives and complimentary principal profiles for leadership positions.</p> <p>-Assessment and Monitoring tools: <i>Strategy Map</i> (Kaplan & Norton, 2000). <i>Balanced Scorecard</i> (Kaplan & Norton, 2000). -Measure concrete outcomes: What</p>
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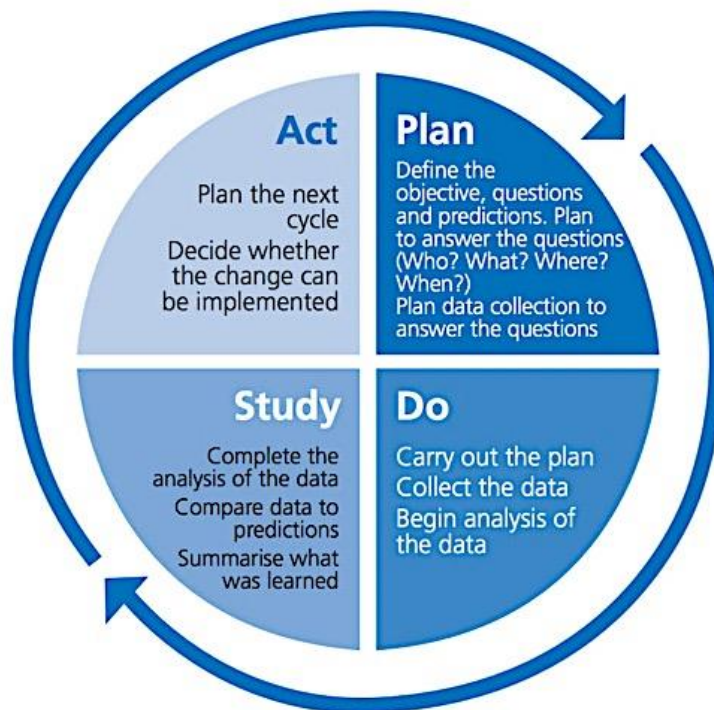
				<p>was accomplished and what has been the impact? What has been learned?</p> <p>-Constantly monitor external environment.</p>
<p>13) Develop and deploy new structures, systems, processes and knowledge, skills and abilities to bring life to the change and stability to the changed organization.</p> <p>-Confirm the Change Phase (Cawsey et al., 2016): Communicate and celebrate the success of the program to reinforce commitment.</p>	<p><i>Sustaining the Change:</i> Launch New Initiatives (in line with original change initiative – unless the environment signals to the organization that there is a need for a more drastic change).</p>	<p><i>Act:</i> Determine Next Steps. Integrate all the learning throughout the process, adjust as needed to objectives or targets. Formulate new theories or make changes to the overarching aim of the continuous work and modify implementation tools or processes.</p>	<p>Anchor new approaches in the culture.</p>	<p>13) Formalize leadership programs, interview processes, leadership support systems: coaching, mentoring.</p> <p>-Set high expectations for principals and vice-principals.</p> <p>-Integrate Learning Organization concepts into organizational structures (meetings, expectations, approaches, culture).</p> <p>-Ensure high quality, relevant PD based in research.</p> <p>-Ensure improvements and refined approaches are implemented and prepare for the next step or cycle for improvement.</p> <p>-Formalization of structures and procedures.</p>

				-Rites and ceremonies associated with the change.
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Adapted from Cawsey et al.'s Change Path Model, *Burke-Litwin Model of Organizational Change* (2018), and Kotter's (1996), *8-Step Change Model*.

Appendix I

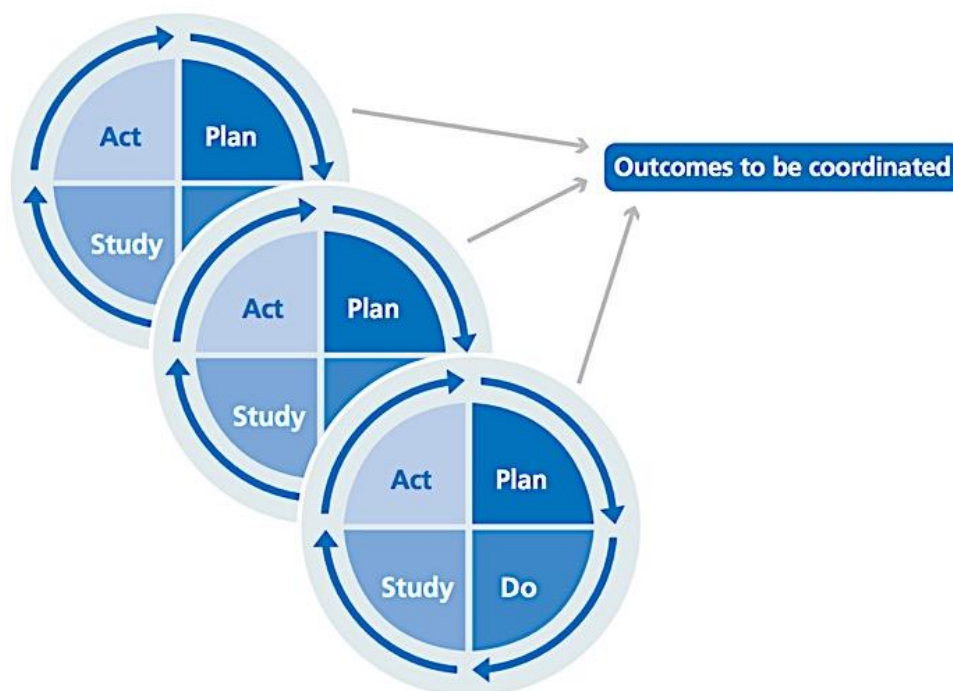
PDSA Model for Improvement



Adapted from: *PDSA Model*. Adapted from Langley, K., Nolan, K., & Nolan, T. (1996). *The improvement guide: A practical approach to enhancing organizational performance*. San Francisco, CA: Jossey-Bass.

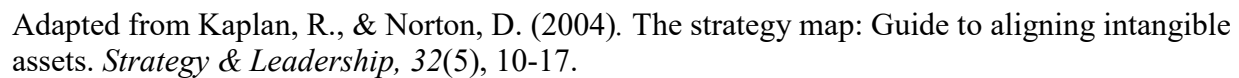
Appendix J

Multiple Teams Implementing Change Using the PDSA Model



Adapted from Langley, K., Nolan, K., & Nolan, T. (1996). *The improvement guide: A practical approach to enhancing organizational performance*. San Francisco, CA: Jossey-Bass.

The Leadership Strategy Map



Appendix L

The Balanced Scorecard for Learning Leadership

Objectives	Measures	Targets	Initiatives	Responsible Team or Individual
Organizational (Leader) Perspective	<ul style="list-style-type: none"> -Effective recruitment strategy. -Number of qualified individuals in the leadership pool to assume principal and VP positions -Reliability of retirement projections and systems leadership needs. 	<ul style="list-style-type: none"> -Growth in the accessibility of knowledgeable, qualified leadership candidates in the pool. 	<ul style="list-style-type: none"> -Recruitment plan. -Marketing strategy. -Transparent criteria for the selections process. -Rigorous interview process. -Succession Plan development that is reviewed annually. 	Human resources and communication department.
Internal Perspectives	<ul style="list-style-type: none"> -Learning leadership program development. -Number of individuals enrolled in the programs. -Program quality using perceptual data. 	<ul style="list-style-type: none"> -Produce and deliver products and services to potential leaders. -Increase Human capital and the availability of talent and skills required for district leadership positions. -Increased principal capacity in mentorship and coaching. 	<ul style="list-style-type: none"> -Continuum of leadership development programs that are reflective of target group needs: emergent leaders to experienced leaders. -Promotion of leadership programs within the system. -Mentoring and Coaching professional development opportunities. 	System principals, principal Team and instructional coaching teams.
Learning and Growth Perspectives	Core competencies and skills required to	-Innovation: creating and developing new	-Creation of safe, risk taking learning environments.	System principals and organizational members.

	support the organization's strategy.	products, services and processes. -Information systems and infrastructure to support the strategy.	-Use of data and frameworks to assess and monitor learning and to adapt implementation strategies. - Human resources aligned with strategy.	
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Adapted from Kaplan, R., & Norton, D. (2004). The strategy map: Guide to aligning intangible assets. *Strategy & Leadership*, 32(5), 10-17.

Appendix M

The Iterative Process of the Balanced Scorecard for Learning Leadership



Adapted from Kaplan, R., & Norton, D. (2004). The strategy map: Guide to aligning intangible assets. *Strategy & Leadership*, 32(5), 10-17.

Appendix N

Constructs for the Dimensions of the Learning Organization Questionnaire (DLOQ)

Dimension	Definition
Create continuous learning opportunities	Learning is designed into work so that people can learn on the job; opportunities are provided for ongoing education and growth.
Promote inquiry and dialogue	People gain productive reasoning skills to express their views and the capacity to listen and inquire into the views of others; the culture is changed to support questioning, feedback, and experimentation.
Encourage collaboration and team learning	Work is designed to use groups to access different modes of thinking; groups are expected to learn together and work together; collaboration is valued by the culture and rewarded.
Create systems to capture and share learning	Both high- and low-technology systems to share learning are created and integrated with work; access is provided; systems are maintained.
Empower people toward a collective vision	People are involved in setting, owning, and implementing a joint vision; responsibility is distributed close to decision making so that people are motivated to learn toward what they are held accountable to do.
Connect the organization to its environment	People are helped to see the effect of their work on the entire enterprise; people scan the environment and use information to adjust work practices; the organization is linked to its communities.
Provide strategic leadership for learning	Leaders model, champion, and support learning; leadership uses learning strategically for business results.
Key results	
Financial performance	State of financial health and resources available.
Knowledge performance	Enhancement of products and services because of learning and knowledge capacity (lead indicators of intellectual capital).

Adapted from Marsick, V. and Watkins, K., (2003). Demonstrating the value of an organization's learning culture: the dimensions of the learning organization questionnaire. *Advances in Developing Human Resources*, 5(2), 132-51.

Appendix O

Notice and Wonder Data Protocol for Analyzing Data

- I. Participants are presented with a table and/or graph of data pertaining the organization.
- II. Participants are given an index card. Quietly and individually, participants write three observations evident in the graph or table. These observations must be free of inference or speculation; they are factually based from objectively examining the display. Each observation starts with the phrase “I notice that...” (5 min)
- III. Round 1. In turn, each participant reads aloud one new observation that has not yet been shared, each time beginning with the phrase “I notice that...” The facilitator records the responses on chart paper. After the last participant shares one new observation, the first participant offers a second new observation and the process continues until all observations have been shared aloud, without discussion. (5 min)
- IV. Participants turn over their index card and quietly write three speculations or question-statements based on the observations heard in Round 1. These speculations attempt to offer possible explanations for the observations, or pose suggestions for pursuing additional data. No attempt should be made to solve the problems that surface; the intent is to gain insights into what the data suggest, how the data are connected and what the data imply. Each speculation starts with the phrase “I wonder why...” or “I wonder if...” (5 min)
- V. Round 2. In turn, each participant reads aloud one new speculation that has not yet been shared, each time beginning with the phrase “I wonder...” The facilitator records the responses on chart paper. This process continues as in Round 1 until all speculations have been shared aloud, without discussion. (10 min)
- VI. Discussion. Teams discuss what has been shared and possible causes, connections and links to organizational performance and note additional data that may be required. (15 min).

Adapted from: “The Practice of Authentic PLCs: A Guide to Effective Teacher Teams” by Venables (2011).