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April Blake
ablake45@uwo.ca

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WESTERN UNIVERSITY

Designing a New Resourcing Model for Rural Schools in Labrador

by

April Blake

AN ORGANIZATIONAL IMPROVEMENT PLAN

SUBMITTED TO THE SCHOOL OF GRADUATE AND POSTDOCTORAL STUDIES

IN PARTIAL FULFILLMENT OF THE REQUIREMENTS FOR THE

DEGREE OF DOCTOR OF EDUCATION

LONDON, ONTARIO

July 1, 2019

Abstract

The motivation of this Organizational Improvement Plan (OIP) is rooted in attaining more equity and social justice for marginalized groups in rural, geographically isolated sections of Labrador. The focus of the change process within the social justice frame is the lack of resources in these rural schools. The broad base of the resourcing issue encompasses lack of rural staff, books, manipulatives, technology, games, funding, community supports, consumables and all other standard school accompaniments. Departmental funding for our schools is very limited, this is an extensive and significant issue in most rural schools in the area, and this OIP plans change in the specific area of the monetary funding of these organizations. The change approaches used in the plan are a blend of critical theory, adaptive leadership amalgamated with other leadership approaches, and several models and processes to analyze and guide change. The plan recommends a two-fold approach of coalition formation to raise awareness among School District X and the union, known as the Newfoundland and Labrador Teacher's Association (NLTA) of the resourcing issue, while concurrently increasing the capacity of the local communities to fundraise for the school. The implications of this change process are that these schools are unfairly funded and need significant change in order for students to receive an equitable education. This will be of interest to similar schools implementing funding or other changes with the intent of emancipating specific groups from oppression and helping to build social justice.

Keywords: social justice, critical theory, adaptive leadership, geographical isolation, rural schools.

Executive Summary

This OIP endeavors to create change within geographically isolated rural schools in Labrador. Currently there is little differentiation between the funding of more urban schools versus rural schools in this location despite vast differences in contexts. Most rural schools in this area are experiencing a resourcing deficit in terms of staffing, books, money, consumables, technology and community resources. This combined with the high levels of poverty in rural areas, and increasingly high levels of staff workloads, has culminated in grave circumstances for some schools. The main change attempted within this process is the funding of schools in these areas. Increasing resources within these rural schools would improve the education of rural students through providing equitable materials already available in more urban schools, and through suppling the possibility of outside of school curriculum based opportunities. It is the hypothesis of this OIP that an increase in resourcing will manifest in two outcomes. These are increased student achievement levels and equitable staff workloads. If the change process is successful it will thereby improve the ability of rural schools to meet the vision of the School District X.

The resourcing problem has occurred due to the per-student funding formula in Labrador. All schools are provided with government funds on a ratio of \$250 per student for all of the school needs. There is an implicit expectation that fundraising activities by the school or local community will supplement the government funds. As rural community populations continue to decrease so do student populations, leading to a decreased amount of funding in rural schools. In addition to rural communities being sparsely populated, there is commonly low socio-economic circumstances found there as well. This has led to a funding problem, with little governmental money and poor, small communities unable to support the local schools.

Three possible solutions are presented for addressing the problem of resourcing in rural schools. The resulting suggested approach is a two-fold proposal consisting of the formation of various coalitions to alleviate the resourcing issue. The first committee is a rural school committee made up various rural school leaders in this province. The goal of this group will be to raise awareness within School Board X and the Newfoundland and Labrador Teachers' Association (NLTA), who may be unaware of the severity of the problem, and to seek support from these organizations. The second committee formation is based in local community fundraising groups to collaborate on fundraising events and increase the funding capacity of the school.

An adaptive leadership approach fuels this OIP combined with an amalgamation of participative and creative leadership. These leadership approaches are framed by a critical perspective in the attempt to achieve some level of social justice for marginalized groups of rural stakeholders. Kotter's (2012) 8 Stage Model, and the Plan, Do, Study, Act (PDSA) cycle is used to guide the overall change process, with Nadler and Tushman's (1980) Congruence Model used in conjunction with the adaptive process (Heifetz, Grashow & Linsky, 2009) to diagnose the organizational problem.

The suggested action of this change process should alleviate some of the resourcing issues for rural schools, culminating in a more equitable educational environment for the students and staff. While this is a valid problem, we must recognize that the resourcing problem evolves from the circumstances of rights and power, and a focus on what social groups are advantaged over others. While it is beyond the scope of this paper to address the reasons for the sometimes unconscious oppression of certain groups, this OIP hopes to alleviate some of the injustices experienced by rural people. This will be attempted by implementing a change plan that could

potentially equitize education through Labrador by the provision of context specific resourcing, though effective use of coalitions and appropriate leadership.

Acknowledgements

First and foremost, I must thank my spouse Trevor for not letting me quit, despite my insistence on doing just that at least a hundred times over the last three years, and for taking care of everything else while I was working on this OIP. You're never-ending faith in my abilities, your understanding that I had little time for anything else, plus your love and encouragement was just what I needed to pull through. A little help from Loki, Max, Flynn and George, our furriest family members was also much appreciated!

To Rea and Sylvie, my hilarious classmates for reading and responding to my novel-like emails in which I rarely stopped complaining. Thank-you for your support, dog pictures, and funny stories. They made me feel like I wasn't alone on this journey, supplied me with endless laughter, and helped keep me sane.

Thank-you to all my professors as well, it can't be easy advising a group of edgy grad students who all expect perfect scores and praise of their work. I am indebted to you all for your knowledge, time and patience.

Also, to all other family and friends, namely my mom Doreen, my sister Storme, my best friend Julie, and to Melanie and Nat, thank-you for your continued love, support, and belief in my abilities especially when I doubted them myself.

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Chapter 1: Introduction and Problem

Introduction to School District X

School District X currently consists of 254 schools with 66 182 students enrolled. These schools and student populations are spread across a vast geographical land mass of approximately 500 km consisting of the island portion, of Newfoundland, and the mainland portion, Labrador. Schools range in enrollment sizes of 1 student to more than 400 with median school and class enrollment sizes differing from region to region. School contexts are extremely varied, some schools are in major city centers, while others are very isolated and not accessible by road. A few schools are not accessible by road or air, but only by water, in boats or on ski-doo as the seasons permit. 37.6 percent of NL schools are classified as urban and 62.4 percent as rural (Newfoundland and Labrador Education and Early Childhood Development Statistics, 2016-2017). Notwithstanding this Newfoundland and Labrador Education and Early Childhood Development Statistics classification, there is no clear definition of what constitutes a rural school in this province. This Organizational Improvement Plan (OIP) will focus on K-9 rural schools in the Labrador portion of School District X that are not connected by roads to any other community. Despite the diversity of schools in the province, all are expected to meet the same curriculum outcomes including the arts and technology within an inclusive classroom, apart from languages which are only offered at select schools where qualified staff is available.

Vision, Values, and Priorities

The vision of School Board X is preparing all students to achieve to their fullest potential in an inclusive, safe, and caring environment. The values of the organization are students first, learning, inclusion, respect, collaboration, accountability, and innovation. The priorities within

the School District X's Strategic Plan are student success, safe and caring schools, leadership development and organizational effectiveness (School Board X Strategic Plan 2017-2020, p. 10). These tenets are forwarded through a conservative framework with decision making processes being centralized, hierarchical and far removed from some local realities. Despite a forward-looking value and priority set, the organization is very traditional, slow to change, and is mainly focused on maintaining the schools as they currently are. As evidence of this, there has been no change to the management of rural schools in the past twelve years, except for the amalgamation of five separate school districts across the province into one in 2013. This has exacerbated the already existing rural school problems due to centralized decision-making being even further away. Directives are sent to the closest local school board branch, then filtered out to schools with little to no consultation or consideration of different contexts.

Organizational History of Newfoundland and Labrador Schools

Historically, from 1800-1930's schools in NL had no solid base in taxation, so there was little funding available. Up until Confederation (1949) schools often were single rooms with no electricity or running water and were heated by wood stoves. Most teachers lacked formal training and were not paid well. Poverty and distance prevented many students from attending school. Without suitable clothes and supplies, and no way to get to class, literacy rates were extremely low in this province. The Smallwood government improved education systems in Newfoundland after Confederation with better schools being built and a network of roads connecting communities to schools, combined with access to social service funds improving the poverty levels. Teacher training programs were also offered at Memorial University under a grant system, producing teachers with higher qualifications. Labrador history is quite different in terms of education. The Moravian church set up a mission in the 1770's in Nain which provided

health services and education to the immediate area. The rest of Labrador was without hospital's or schools until in the 1890's when Wilfred Grenfell began worldwide fundraising tours to build and staff medical and educational organizations (Heritage NL, 2019). All NL schools were run by the churches until 1997 with government sponsorship, and this included the residential school system for Aboriginal groups in the province. In 1998 all public schools in NL became non-denominational.

Organizational Context of Newfoundland and Labrador Schools

School District X is a publicly funded school system with 22 of its 254 schools located in Labrador. The school populations consist of a mix of student cultures, mainly Inuit and those of European descent, along with a limited number of Innu students. This is due to the Innu First Nations taking over the school boards in their main living areas, and most of these students attending school within the Innu School Board range. School District X employs over 5000 teachers across the province. Though most teachers are non-Aboriginal, there has been an increase of Aboriginal teachers recently due to an Inuit Bachelor of Education program being implemented by Memorial University in partnership with the Nunatsiavut Government and the College of the North Atlantic, that trains only Inuit people to be hired as teachers within School District X.

The schools are run by several levels of management starting with the Board of Education at the top, followed by the central office of School Board X in St John's, and several sub-levels of management throughout the province with one office located in central Labrador. Financial considerations are handled directly by the main office, with professional development and most other school issues handled by the nearest school board branch.

The Provincial Government has developed what they refer to as a “rural lens” (NL Rural Lens); however, there are no departments responsible for rural issues, and no provisions or differentiation made for education in rural schools versus urban schools.

Rural schools in this province generally do not have specialist teachers, so music, art, and physical education is taught by classroom teachers, and French and any other second language is usually unavailable. In these rural schools, staff is often limited. The staff allocation is controlled by the branches of the local school boards allowed for by the Schools Act and is based on a per student and student need ratio. Upon initial examination this makes sense, but it also means rural schools are sometimes required to function with extremely limited staffing, and those staff often fill multiple roles in administration and teaching. A teacher allocation commission was appointed by the Minister of Education in August 2006, the result of the commission's work was a report entitled *Education and Our Future: A Road Map to Innovation and Excellence* (May, 2007). The reason for this commission was to review the process by which staff was allocated to each school. “Clearly, the chief element was that every student must receive an equitable educational opportunity for self-fulfillment and for the purposes of pursuing postsecondary education” (p. 71). This report highlighted the vast differences in the geography, economy, and demography of schools within NL and made 35 recommendations, none of which have been implemented over ten years later. Also, the formula for teacher allocation based upon student population continues despite vast differences in the needs of schools, particularly rural ones.

The Learning Distribution Resource Centre (LRDC) in St. John's disperses authorized resources on a per school government budget allotment, and these resources are equitably distributed percentage wise among urban and rural schools. However, any supplementary books

must be purchased through the local school budget, and as schools are funded on a per student basis, the low enrollment numbers in rural schools leads to a lack of funds, and often a lack of books. This is also the reason for the lack of school supplies, consumables, and funds for outside of school or community experiences. Schools with enrollments of six or more students have set base allocations, with the additional per student percentage, schools with 5 or less students are not afforded this base. (See Appendix A).

Rural towns in Labrador are seeing both increasing and decreasing populations, with some areas having high birthrates and low outmigration, while others, having little to no economic opportunities are experiencing extreme decreases in population. Some towns in this province are also facing the possibility of resettlement with one town already being resettled in 2017. Despite outmigration in some rural communities due to economic factors and declining birthrates, the rural schools continue to outnumber the urban, yet no provisions in the past or present have been made for the differences between the rural and urban schools, between more isolated rural schools and more accessible rural schools, or between the heavily populated versus sparsely populated schools.

Notwithstanding the high employment rates due to natural resource processing in some parts of Labrador, the high cost of living contributes to the low socio-economic status of most rural communities. This combined with the social problems commonly associated with Aboriginal groups within Labrador, such as addictions and mental health issues often leading to a lack of employment, influences rural poverty levels. This in turn affects the local school with some families depending on schools to feed their children and provide necessary school supplies. Some schools implement a Kids Eat Smart Program (Kids Eat Smart 2018); however, this is heavily reliant on fundraising which can be difficult in a poor, thinly populated area. Businesses

are also scarce to non-existent in these communities, having little to no ability to support the local school.

Finally, the legacy of the residential school system continues within Labrador, with the last residential school closing in 1980. The residual mistrust of schools and school staff continue to affect local schools, particularly as most of the staff are non-Aboriginal located in communities that consist mainly of Inuit peoples or those of Inuit descent. This can make community members wary of interaction with the school and school staff.

Leadership Position and Lens Statement

Due to the nature of life in rural communities, leaders in these schools fill many roles. Most work as both teachers and administrators, and often those teaching have multi-grade classrooms, some teaching up ten grades simultaneously. In addition, secretarial support positions are usually only part time, with some schools having no such support, so rural staff will also take on these duties. Extracurricular activities, maintenance and even transportation are on the rural educational staff agenda when the need arises. These contexts also place heavy burdens on staff by way of community visibility and involvement. “The school leader is expected to nimbly relate to the rural lifestyle, live within the school community, join local organizations, participate in local events, and act as a professional, behavioural, social, cultural, and spiritual role model” (Preston, Jakubiec & Kooymans, 2013, p. 3).

As schools are staffed with a formula based upon student population combined with student need, the results are low staff numbers due to low student enrolment. The complex array of leadership needed in a rural school means “leaders cannot use the same style in all contexts; rather they need to adapt their style to followers and their unique situations” (Northouse, 2015, p.

98). Out of necessity, and the elaborate nature of leadership in rural, isolated schools, a combination of methodologies is necessary in these contexts. As Klar and Brewer (2014) have pointed out, “given the complex environments school leaders find themselves in, it is critical that they possess both an understanding of effective leadership strategies and the practical wisdom to adapt these practices to their immediate contexts” (p. 425). In conjunction with the diversity of roles rural leaders face, there is also inequity in rural education in Labrador, with larger schools being advantaged with resources, despite housing students from higher socioeconomic backgrounds and parents more likely to contribute to the local school. In addition, as the larger schools are populated with predominantly white students from families with higher socioeconomic status’, while the rural schools are populated with a large percentage of poor Aboriginal students, and as “student performance has been tightly linked to poverty and racial/ethnic differences” (Halverson & Plecki, 2014, p. 54) we need to consider the outcomes of student achievement in these locations.

Combined with these challenges, rural leaders also have the advantage of more flexibility than might be seen in urban schools. With limited staffing and low student enrollments, schedules are not as strictly enforced, giving more room for experimentation in reaching goals. There also seems to be less resistance to try new initiatives due to the normalcy in these schools of balancing varied roles, multi-grades, and all subject areas. Staff recognize a tacit expectation that there needs to be extreme pliability in order to meet the needs of students, community and larger organizational expectations. The problems faced by rural isolated educational staff may also be part of potential solutions with the adjustability of daily schedules, closeness of local community, and inter-community connections, giving rural staff the possibility of adaptation and creativity for problem solving. As I reflect on my experiences, the adaptive leadership approach

emerges from this type of rural school context; with sub-leadership approaches of creative and participative, encompassed by leadership from a critical perspective.

In planning this organizational change using adaptive leadership, positional authority as the principal, and relationship power, as positive relationships have been formed over many years, will be used to help stakeholders deal with conflict that arises as values change to meet the organizational goal.

Adaptive Leadership

The term adaptive emerged from evolutionary biology, reflecting the process of keeping what is needed to survive, while discarding or modifying what is no longer useful, then creating new and better systems. As Heifetz, Grashow and Linsky (2009) point out, there is a difference between authority and leadership. Authority is given to those who provide a service within the confines of certain expectations from stakeholders. Authorizers are the stakeholders that have these expectations from those in positions of authority. If these expectations are met, authorizers are happy. In this OIP the authorizers are the school boards, both central and the local branch, the community members, and parents. Despite rural schools being under resourced, they are somewhat effective in meeting student achievement outcomes, and parental and community expectations. This occurs through staff using their own individual funds to make up for what is lacking in school funding, and by spending large amounts personal time coming up with creative solutions to meet expectations and reach curriculum objectives. Unfortunately, in identifying this problem “most people around you either do not see it or see it but do not want to deal with it” (Heifetz et al., 2009, p. 31). The expectation of the rural school authorizers is that curriculum objectives and student achievement will occur with the current level of resourcing, regardless if they are aware of the inequity.

On the other hand, as Heifetz et al. (2009) suggest, adaptive leadership is not about meeting your authorizers' expectations, it is about challenging some of those expectations, and disappointing people without complete alienation. In challenging the present state of per student funding allocation, and inadequate local fundraising, this will necessitate a loss for involved parties. Perhaps a financial shifting through central reorganization of funds distribution means some money loss to urban schools; a loss of complaisance for community members who will be required to support the local school in a more practical way; or a loss of control and/or funding for other community groups who rely on local fundraising for their various endeavors. As Heifetz et al. (2009) tell us, "(a)adaptive leadership almost always puts you in the business of assessing, managing, distributing, and providing contexts for losses that move people through those losses to a new place" (p. 22). In reference to adaptive evolution regarding resourcing, schools must evolve by deciding what to keep and what must change, through a variety of experimentations to determine what works best.

The necessity of being adaptive in rural education cannot be overstated, with staff expected to do more with less, the increase of pervasive student needs, embodying a multiplicity of roles, and lack of external supports. Rural school leaders must constantly adapt to the changing, and difficult landscape of modern schooling while ensuring student achievement levels and adhering to School Board X' vision and values. Heifetz et al. (2009) state that adaptive leadership is "the practice of mobilizing people to tackle tough challenges and thrive" (p. 14). This encompasses the leadership complexity of rural schools. Challenges are handled daily by a small group of under-resourced staff, and these challenges, even on the micro level, have no clear resolution within the intricacy of political decision making, community considerations, student achievement outcomes, heavy workloads, the issue of student poverty, and cultural

factors all weighing in. Adaptive leadership will advance the change process as it requires the mobilization of even larger groups of stakeholders to take on the resourcing issue and succeed.

The lack of funding in rural schools demonstrates that the values of School Board X are upheld to a greater degree for urban schools with their associated advantages. As an adaptive leader “you are challenging the status quo, raising a taboo issue, pointing out contradictions between what people say they value and what they actually value” (Heifetz et al., 2009, p. 26), distinctly illuminating the discrepancies in values. The value of “students first” appears to only apply to some students, as not all students are provided with the same level of school resources. Wong and Chan (2018) offer that

(a)adaptive leaders work together with the team to bring out tough issues, challenge established practices, and involve people at all levels to learn their ways to solutions.

Followers are actively engaged in the change process to experiment and to learn.

Therefore, in the adaptive model, leadership is a practice rather than a position or a job (p. 106).

Creative Leadership

The context of rural schools necessitates a creative approach to everyday leadership because again, of the many roles that rural staff will fill; however, creativity is mandatory as well to generate solutions for the resourcing of rural schools.

Creative leadership is an imaginative and thought-through response to the opportunities and challenging issues that inhibit learning at all levels. It’s about seeing, thinking, and doing things differently in order to improve the life chances of all students. Creative

leaders also provide the conditions, environment and opportunities for others to be creative” (Stoll and Temperley, 2009, p.12).

Leaders of multi-grade, rural schools (sometimes sole-charge) have to be “creative thinkers, because they are practically reinventing the entire concept of leadership in a different performance setting” (Marques, 2015, p. 1312) and are “innovative out of necessity” (Wallin, Anderson, & Penner, 2009, p. 5). Creativity requires innovation as applies to generating resourcing change in rural school contexts. Clearly, equitable resourcing is not being achieved through the existing parameters of funding formulas and community fundraising. Solutions, therefore, will require a unique and novel experimentation that could work in such distinctive settings. Fullan (2011) and Lehrer (2012), encourage creativity as collaboration to generate ideas that could enhance or transform an organization, which will be an important factor in potential resourcing resolutions. As Puccio, Murdock & Mance (2011) tell us, creative leadership requires using imagination to define and guide a group toward a goal that is new for all involved parties.

Participative Leadership

Participative leadership will be used in combination with adaptive and creative during the change process, and potential resolution of the problem of resourcing.

The assumption is that all members of the organisation should have an equal opportunity to contribute to decision-making. In professional organisations, such as schools, expertise is widely spread, and structures are seen as vehicles for enabling such expertise to inform decision-making. The hierarchy is flattened and is much less pyramidal than typical managerial structures” (Bush, 2015, p. 42).

This participative leadership would be required in both the rural school committee consisting of members from various rural schools, and also in the fundraising groups that will be implemented. Although the rural school principal or change leader may have to make some final decisions if the groups are undecided, most of the leadership would be handled within each group and all members would participate and be heard. This would allow the strengths of individual people to be utilized for either interaction with influential board and union members to create the awareness of the need for change, or for the more practical fundraising ideas and application.

Critical Lens

Leadership in rural, Aboriginal schools also requires a critical approach. Irvine, Lupart, Loreman and McGhie-Richmond (2010) remind me that “inclusive education- based on the premise of social justice- advocates equal access to educational opportunities for all students” (p. 7). Social justice has its foundations in privilege versus oppression, occurring through the power and control of certain groups suppressing the rights of others, sometimes unknowingly. Rural school educators, students and community members represent marginalized groups of people whose voices are not always heard in the political or educational arena. Leaders in educational organizations must always be aware of, and attempt to change, inequities. In rural areas in Labrador, consciousness of the privileges afforded to those students residing in predominantly white, urban communities, with families of higher socio-economic status is necessary to ensure provisions are made for schools not in the mainstream areas to be able to meet the vision and values of School Board X, along with staff, community, and parental expectations.

Leadership Problem of Practice

There is a lack of all types of resources in rural, isolated, Aboriginal schools in Labrador. This includes specialized and educational support staff, administrative support, funding, books, general supplies, consumables, community resources, technology and technology support, even a lack of maintenance personnel and supplies. Even though the dearth of all types of resourcing in schools affect teaching and learning, the problem of practice that will be addressed specifically in this OIP is the lack of books, consumables, and school funds necessary to provide curricular and non-curricular based opportunities, both within, and outside of the community. This funding focus includes monies distributed by the provincial government and those raised by school, or community-based fundraising events. School Board X allocates funding and staff on a per student basis. Financing is allotted in the amount of \$250 per student per year, distributed to schools from the district. Associated with the lack of funding, and potential solutions to alleviate the repercussions of such, is the lack of school staff in some rural areas, which ultimately affects fundraising efforts. High community expectations from educational staff in rural areas, combined with heavy workloads, also result in lack of time to attend to school funding endeavors. This is combined with competition from other community groups to access limited local funds for various money raising undertakings. Staff is dispersed in smaller schools as a one teacher to fourteen pupil ratio, with some additional student assistants depending on level of pervasive student needs. This results in several sole-charge schools in the province due to student enrollment being under fourteen students. I am the leader in one of these rural organizations, holding the position of principal/teacher, housing students from Kindergarten to grade 9, and the pre-school Kinderstart program.

The ability to meet provincial curriculum outcomes is a major challenge in under resourced schools. Rural staff often communicate informally that workloads and student

achievement are heavily affected by lack of resourcing, though the research is sparse on both these issues, and on rural leadership in general. As Beesley and Clark (2015) suggest, “the apparent gap in the literature on rural school leadership highlights the need for additional research to support strong rural leadership” (p. 243). Closing this gap would help alleviate issues surrounding curriculum and programming demands being unreachable, increasing student achievement, outside of community enrichment, extra-curricular possibilities, staff meeting funding deficit with personal income, easing the unsustainable workload of rural staff, a portion of social justice being served, and attaining the vision and values of School Board X. This OIP considers a process whereby rural leaders can probe and determine how to raise more awareness among stakeholders regarding the impact of inadequate resourcing as well as ways to potentially increase resourcing capacity.

Framing the Problem of Practice

History, Politics, Economy, Population and Demographics

As previously mentioned in this chapter, schools in Labrador were run by churches until 1997, and were not completely taken over by the government until that time, so full government public school funding is a relatively new phenomenon here. For the past 22 years, schools have been funded by the same formula of per student percentages. The rural areas of focus represent 9% of the province’s total population, and with aging, declining birthrates in some areas, outmigration, and a lack of incentive to move into a rural area, there is a steady decrease in population. “Over 2001-2011... urban population grew by 12.2%, while the province’s rural population declined by 8.4%. Population projections indicate that Newfoundland and Labrador’s rural population will decline by a further 19% – from 269,719 in 2011 to 217,544 in 2025 –

painting a bleak future for the province’s rural communities” (Strengthening Rural Canada, 2018).

The following table illustrates the median English school sizes in Labrador being much smaller than those in the rest of the province. Although the median size accounts for all schools in Labrador including those in more urban areas and this results in the median population appearing much larger than those that actually exist in rural schools. Taking this into consideration, the school populations are clearly much smaller in rural areas than elsewhere, which means less funding, less staff, and smaller communities, all of which affect the resourcing potential of these organizations.

Table 1.1

Number and Percentage of Schools by School Size

Table 7. Number and Percentage of Schools by School Size and Median Size by District-Region, 2017-18

District-Region	Schools by School Size												Total	Median School Size
	<50		50-99		100-199		200-299		300-399		400 or More			
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%		
NLESD-Labrador	8	36.4	4	18.2	3	13.6	1	4.5	2	9.1	4	18.2	22	74
NLESD-Western	14	21.9	10	15.6	18	28.1	11	17.2	5	7.8	6	9.4	64	139
NLESD-Central	13	16.3	15	18.8	19	23.8	18	22.5	6	7.5	9	11.3	80	165
NLESD-Eastern	2	2.2	6	6.7	10	11.1	20	22.2	11	12.2	41	45.6	90	365
Conseil scolaire francophone	4	66.7	1	16.7	1	16.7	0	0.0	0	0.0	0	0.0	6	38
Total	41	15.6	36	13.7	51	19.5	50	19.1	24	9.2	60	22.9	262	206

Note: NL Department of Education. Number and Percentage of schools by school size and median size by district-region, 2017-18. Reproduced with permission of the NL Department of Education.

Of course this represents a range of rurality, with the most adversely affected being those in isolated regions, not adjacent and connected to more metropolitan areas. As the community populations decrease, so does school enrollment numbers and therefore the funding of these

schools. There is the added complication of the decreasing community populations and low SES of community members due to economic factors and age affecting potential fundraising.

Structural, Political and Critical Frame

This OIP is heavily influenced by both Bolman and Deal's (2013) structural and political frame, and by critical theory. The other two Bolman and Deal (2013) frames, the human resource and the symbolic frame do not apply so specifically to this PoP. The HR frame places more emphasis on people's needs. It chiefly focuses on giving employees the power and opportunity to perform their jobs well, while at the same time, addressing their needs for human contact, personal growth, and job satisfaction. The symbolic frame addresses people's needs for a sense of purpose and meaning in their work. It focuses on inspiring people by making the organization's direction feel significant and distinctive. It includes creating a motivating vision, and recognising superb performance through company celebrations. While these are important elements in every organization, they do not reflect the challenges or the potential solutions of rural school resourcing as clearly as the structural and political frames.

The structural frame reflects how public-school systems are organized with "clear goals, focus on the mission, well-defined roles, and top-down coordination" (Bolman and Deal, 2013, p.43). This frame is concerned with putting people in the right roles, allocating responsibilities, and achieving common goals through diverse effort integration. School Board X is representative of a professional bureaucracy in that core activities (education) is performed by large numbers of educated professionals. It is a loose/tight structure in which expectations from school boards are high but the individuals within the schools are generally left to independently meet those expectations, sometimes without necessary supports. This structural framework is successful in organizations when a mix of vertical and lateral coordination is employed; however, there are structural design options that need to account for diversity within the different schools. The lack

of resources in rural schools is caused by not differentiating the needs of rural schools versus urban schools to meet the common goal of student achievement, which is reflected in the organizational values. Our school board is centralized with the top managers in a location far removed from the realities of isolated rural schools. Though there are branches of the board in four more locations which represent the secondary level of management, often these branches are also in larger centers and members are unaware, unwilling, or unable to address the complex issue of lack of resources in rural schools. As Omae (1990) contends, “no matter how good they are, no matter how well supported analytically, the decision-makers at the center are too far removed from individual markets and the needs of local customers” (p.87).

This leads me to consider a critical theory perspective on this OIP’s problem of practice. As Davies, Popescu, and Gunter (2011) suggest, “the purposes of critical work (is) to both understand the world we are in, and to seek to change it for the better” (p. 47). Social inequality is rampant when looking at rural versus urban schools, and according to Kincheloe (1999) staff in rural areas are often “working with subordinated and marginalized groups, and critical teachers must try to illuminate the subtle and often hidden educational processes that privilege the already affluent and undermine the efforts of the poor” (p, 75). Rural children in this area generally live in poverty where many basic needs are not met. It becomes a significant challenge for educational leaders who serve students living in scarcity to figure out how to address their needs. The effects of poverty double the urgency for a revamping of resourcing in rural areas, as these students have a much higher dependence on the local school than students who live in more affluent regions. The critical desire to change the rural world for students under a social agenda that will attempt to illuminate the marginalization of rural students and staff and reveal the advantages enjoyed by urban schools, while providing possible change initiatives, are key ideas

in this OIP. A range of issues encompass this critical realm, Davies et al. (2011) state “(t)he complexity of the educational experience within particular locations such as the urban and the rural need careful research so that the impact of place and space is given due accord” (p.47).

There are moral and ethical considerations folded into this problem of practice, which when examined could reveal that in not providing equitable resourcing to rural schools, the people within those schools are being oppressed and implicitly told that they are not as worthy as people in urban schools. “Both teachers and students are taught to conform, to adjust to their inequality and their particular rung on that status ladder, and to submit to authority” (Kincheloe, 1999, p. 75). As mentioned, rural communities typically are populated with people of low socioeconomic status, it is beyond the scope of this OIP to go into depth for the reasons contributing to this; however, community SES cannot be separated from the needs of the local school. Economic disadvantage at home affects all facets of school life, from hungry students without their basic needs met, stress at home resulting in an inability to focus at school, dependence of parents on the school to both feed the students and furnish them with necessary school supplies and sometimes personal supplies and clothing, to the inability to maximize fundraising in the community to benefit the school. As critical theory is concerned with emancipation, the issue of under resourced schools is emancipatory in nature. Rawls (1972) was one of the first proponents of social justice to point out that unfair distribution of resources is one of its key components. We must also realize that “through no fault of their own, vast numbers of men, women, and children are penalized, disenfranchised, and excluded from what life has to offer, while others routinely enjoy benefits, privileges, and rewards” (Ryan and Tuters, 2017, p. 571). Empowering the marginalized groups of teachers and students in rural schools who are unable to meet the school boards organizational vision due to lack of resources is impossible

without herculean efforts. These efforts are not so consistently required from individuals in urban schools.

Keeping this inequity in mind, rural schools also have advantages that might not be present in larger schools. Rural schools are completely inclusive out of necessity, and there are often strong social ties between the school and community as the legacy of the residential school system begins to heal in some areas. Close relationships form between staff and students as a result of multiple years together, and there is little to no class conflict in rural communities. Rural classrooms, with lower enrollments create room for higher rates of individualized programming, and in general, rural schools run on a more flexible schedule. There are also possible positive effects on rural students living in poverty, “all schools do well with the children of wealthy parents. That isn’t difficult. All schools struggle with the children of poor parents, but the schools that do best with children of poverty are small and rural” (Surface & Theobald, 2014, 577). In addition, the need for creativity in these unique settings may lead to an engaging, and cooperative environment for students. Evidently there are many positives in rural education, these positives are born from contextual necessity, but may also be instrumental in supporting a potential solution for the resourcing inequity.

Guiding Questions for Rural Resourcing

Three questions emerge upon examination of this problem of practice. First, why does the current formula for resourcing schools in Labrador need to be adjusted? The student enrollment ratio appears fair upon initial examination; however, school context needs to be considered and the school’s ability to raise funds within its unique community. Community populations and poverty levels affect the funding of local schools, as does the geographical isolation. Resourcing and opportunity should be equitable between all schools, but with the current funding formula,

combined with contextual factors, rural schools do not enjoy the same advantages as urban schools, even as applicable to basic classroom activities. This change is required in order for social justice to occur, and to afford all marginalized groups of students the same education afforded to more affluent urban groups

Out of the previous question evolves two more, what needs to change to resolve the current resourcing deficiency in many rural schools? How does such change occur? This requires modification at many levels, the Department of Education, School Board X, the NLTA, urban school constituents, and rural stakeholders. Possible differentiation in terms of funding of schools depending upon context would be the ultimate goal; however, more practically, creating awareness of the need for change is the purpose of this OIP, along with increased fundraising initiatives for rural schools. This change will be forwarded through a rural school committee and fundraising groups supported through rural school leadership and change initiatives.

Leadership Focused Vision for Change

Gap Between Present and Future Envisioned State

As the present state of resourcing in rural, isolated schools compared to those in more urban areas in Labrador is not equitable, this affects all aspects of school life, most importantly student achievement and social justice. This OIP focuses on only one aspect of the resourcing issue, the lack of funds and ability to procure funds due to previously discussed factors. This lack of funding affects day to day school instructional ability, with not enough resources to reasonably teach curriculum outcomes. Kindergarten to grade three classes in this province are currently suppose to be “play-based” classrooms, with a multitude of toys, manipulatives, books, outdoor equipment, building material, consumables etc. on offer. All grades; however, are

encouraged to be hands-on classrooms, with students being engaged and learning through interesting, multi faceted lessons. For example, the heavily marketed Scholastic “Let’s Do Science” compulsory resources have the expectation that students will be designing and performing experiments, projects, and demonstrations that enhancing their learning. This science program requires a multitude of materials which cannot be purchased without proper school funding. The supplied resources are a teacher’s handbook and some student books and posters, while none of the consumables, displays, centre materials, or manipulatives are provided. This resourcing dilemma is a problem in all curriculum areas. The expectations remain the same for all schools, yet the availability of resources to meet those expectations can vary drastically, with some schools in urban areas housing supply rooms with materials for all subject areas, and rural schools not having the basic necessary supplies to meet fundamental curriculum demands. Of course, the current state also exemplifies the lack of out of school experiences that rural students can access. Urban schools have community resources that are easy to reach by road with busses in place for transport of students, while rural schools have little to no community resources, and travel out can often be difficult due to isolation of communities and thus high travel costs.

The envisioned future state would see an increase in funding to furnish rural schools with an equitable amount of money in order to supply staff and students with resources needed to meet curriculum expectations within the classroom, and funding to facilitate travel to areas outside of the community to be able to avail of curricular based learning opportunities. This improved resourcing environment would increase student achievement by providing engaging lessons that follow the curriculum suggested activities and by ensuring participation in hands-on work with enough resources for all students. This desired state would also provide a sufficient number of books, games, consumables and all other supplies to provide students with items that

fall within areas of interest, thereby increasing personal investment in studies and an overall positive view of school. Increasing resourcing would also reduce the heavy workload of teachers, and the perpetual strain of trying to provide expected lessons and opportunities for students without the necessary items to do so, along with a reduction in the amount of personal income staff use in order to supplement class activities. Informal reports from both administrators and teachers range from a thousand dollars per year to several thousands of personal earnings spent to augment what is available in some rural schools.

Priorities for Change

There are two priorities for change within this OIP. First, the creation of a rural school committee to inform upper levels of management, such as the Director, specialists in support positions, and the NLTA, of the day to day realities of rural school issues, starting with the lack of resourcing, specifically funding. Many School Board X leaders from the central school district have never been to rural schools in this area, some have never been to Labrador at all. These school board leaders would presumably know the student enrollment numbers and therefore the associated funds that are made available to rural schools; however, many appear to have no concept of the levels of isolation, realities of community issues, or the hardships faced by rural school staff and students. This lack of knowledge about rural schools in this province is informally communicated continuously between staff in these areas, with unlimited anecdotes about various conversations with central district staff. A rural school committee with representation from School Board X offices, and potentially with a representative from the NLTA, would help rectify the unfamiliarity with general and context specific concerns of schools in these areas.

The second priority, and perhaps the most practical, is the implementation of local, online, and out of town fundraising initiatives, involving volunteers and businesses, to increase the resourcing capacity of rural schools.

Change Drivers

The change drivers in this OIP are primarily the rural school stakeholders on the front lines; school staff, parents, and community members. School staff are the key figures in forming a rural school committee, its organization, members, agenda and continued participatory involvement from all constituents. Next, the parents and local school community members, along with local school staff again, are responsible for taking on more intensive school fundraising initiatives, possibly extending to outside of the local community, potential online strategies, and in reaching out to businesses outside of the community for school funding support. There are often no school councils in rural schools, therefore parental contributions would lie within the practical arena of fundraising, while the rural school committee would consist of rural school staff from different communities in Labrador. Secondary change drivers would be the central school board, who with a new awareness of issues may make policy changes in key areas of funding for rural schools

As this proposed change is so profoundly influenced by a large number of stakeholders, a stakeholder analysis is beneficial.

The purpose of stakeholder analysis is to develop a clear understanding of the key individuals who can influence the outcome of a change and thus be in a better position to appreciate their positions and recognize how best to manage them and the context”

(Cawsey, Deszca and Ingols, 2012, p. 195).

This is to determine who has the power and resources to help make change happen, or to resist the change, and to move people along a continuum. A continuum begins with awareness, then interest and a desire for action, and finally, taking action. “Classifying stakeholders according to this continuum is useful because it can guide what change tools you should use” (Cawsey et al., 2012, p. 198). According to Cawsey et al. (2012) most stakeholders fit into one of five categories: innovators or early adopters; early majority; late majority; laggards or late adopters; and non-adopters (p. 200). Once grouped, “the change agents can then consider power and influence patterns and develop strategies and tactics that will move the individual stakeholders along the adoption continuum” (p. 201). Power can be exercised by “strength of personality and integrity or the ability to reward and punish” (p. 186). The power of the government and school board resides in the numbers game and basing school resourcing on enrollment. Rural school committees consisting of members with influence, well tuned social skills, and strong (or the potential to build strong) relationships with board or government members may be the key to raising awareness of the resourcing issues amongst these influential groups. The power of school staff resides in inspiring each other to maintain active roles in resource procurement in whatever form suits them best, and in positive community connections that result in the facilitation of community involvement in school fundraising, including events, grants application and follow up, and resourcing awareness for all potential school supporters.

These groups need to be understood and moved along the continuum until the desired change is realized. Fortunately, most of these stakeholders would naturally want what is best for the students, as the school board’s reason for existing is the education and well being of its students, and the staff and local community always have the best interests of students at heart. In this type of change, there would probably be little resistance to the general concept of increased

school resourcing for rural schools, therefore most constituents would be early majority.

However, the final stage of the continuum, which is taking action, would be when the change agent would need to increase pressure, use tactics, or exert power and influence in order to make the change happen.

Organizational Change Readiness

Although stakeholders- the primary change agents in this OIP- can be resistant to change, as already mentioned, increased resourcing would not see much, if any resistance due to its very nature of easing the workload of staff and providing more materials to students. Negative community reactions are possible if the increased school fundraising is viewed as a threat to other fundraising events, or hazards community member control over what occurs in the town. Negative reactions could possibly also be expected if rural school resourcing was increased at the government or departmental levels if that change meant less resourcing to urban schools. Generally, schools and communities that are better resourced do not resist if they maintain their advantage. "In other words, promoting equity by gaining support from the "haves" for a differential distribution of resources is accepted until it results in the "have nots" gaining fully equal access to information, resources, or opportunities" (Halverson & Plecki, 2015, p. 62). Cawsey et al. (2015) list four steps that we need to ask when we are developing our understanding of the need for change and creating awareness for it. Seek out and make sense of external data, seek out and make sense of the perspectives of other stakeholders, seek out and make sense of internal data, and seek out and make sense of one's personal concerns and perspectives (p. 102). External data examined has been the funding of schools through a student enrollment ratio, which makes sense at face value until the discrepancies between rural school and urban school resourcing are understood, which they rarely are in people not living in this

type of context. The perspective of stakeholders needs to be assessed through the previously discussed stakeholder analysis due to the change drivers consisting solely of stakeholders. The internal data varies from school to school and the particular contexts. Some rural schools are situated in communities consisting of wealthier townspeople who are able to financially support the students and school or are in a location that is closer to a major centre making travel costs and shipping costs more reasonable, or possibly being in a community populated with deeply motivated fundraising constituents. However, most rural schools are situated in geographic isolation with a small community of people living in poverty. This is a major contributor to the problem of resourcing in rural schools. Personal concerns and perspectives are an important factor in this OIP, and the driving force behind its creation.

A series of examinations of the formal and informal organizational structures is needed. The formal systems which are “processes that are used for coordination, integration, and control purposes” (Cawsey et al., 2012, p. 146) in rural schools. This relates to resourcing in two ways, first is the funding of schools from the Department of Education. The second system is at the school and community level in terms of the assignment of constituents for fundraising initiatives, combined with grant applications and follow up. Within this category of formal structures, rural schools are a combination of mechanistic and organic organizations. The mechanistic being “formal hierarchies with centralized decision making and a clear division of labor” (Cawsey et al., 2012, p. 149). This would be seen in the strict adherence to numbers deciding school funding from a government or departmental perspective. As staff are expected to play multiple roles, there needs to be the flexibility and willingness to take on varied jobs within the school, which might have a positive effect on fundraising in these contexts. The key idea in the assessment of these formal structures is determining where the strengths and weaknesses of each lie, and in

aligning each system within the particular environment of each school. In essence, this is simply determining what can be done at the local level to change the lack of resourcing in rural schools. Each context will differ depending on circumstances. There is very little hope at present of changing the funding formula of money on a per student ratio. There is potential though for raising the awareness of the resourcing situation in rural schools. Awareness at the upper levels of management, and also local area awareness, as some key players such as community members and local businesses may not be conscious of the lack of resources in the rural school. Additionally, task assignment can be broken down specifically within each school and community to manage things such as the rural school committee, fundraising, outside partnerships, grant applications, mobilizing community members, and approaching outside of community individuals and businesses for support.

Informal structures consist of cultural and power dynamics concerning the stakeholder perception of the change one is trying to make. These informal structures will be assessed through the stakeholder analysis. However, in this OIP we cannot underestimate the importance of relationships. Rural school leader success depends primarily on the leader's ability to navigate a complex web of community culture and political pitfalls. The delicate balance of conforming to community expectations, while making necessary changes for the improvement of the schools can be a difficult task. Although school leaders can exert their position power to force compliance on most issues, this can lead to "passive resistance, active opposition, [and] sabotage" (Cawsey et al., 2012, p. 185). Therefore, it is necessary not only to categorize the stakeholders in the initial analysis but to be wary of pushing constituents too far in the interest of making planned changes.

Cawsey et al. (2012) outline an intensive mandate for organizational readiness for change.

An organization's readiness for change is determined by the previous change experience of its members, the flexibility and adaptability of the organizational culture, the openness, commitment and involvement of leadership in preparing the organization for change, and member confidence in the leadership. It is also influenced by the organizational structure, the information, reward, and measurement systems, resource availability, and the organization's flexibility and alignment with the proposed change (p. 107).

Although not all items on this list are fully in place in this OIP, most components are at least partially available and can be further developed as the change progresses.

Lack of resources in rural schools is an issue where change is necessary, as continuing with the status quo no longer serves the stakeholders within the schools and is explicit in its unfairness and oppression of rural constituents. This is a complex issue that is present due to many political, environmental, social, and economic factors. It is not easily solvable and is not a result of any one group deliberately trying to create advantage for themselves yet scarcity for others. However, it does require stakeholder acknowledgement, effort, and possible sacrifice in terms of time, labour, and potential funding shifts to reach resolution. Chapter two will outline the planning and development stages of this change process.

Chapter Two: Planning and Development

Leadership Approaches to Change in Rural Schools in Labrador

As a change leader, I will be striving to utilize one main leadership approach complemented by two sub-leadership approaches as supports to address this OIP. Adaptive leadership will head up the change process with the influence of participative and creative leadership as well. In dealing with an issue of equity and emancipatory change there is a current of social justice leadership underpinning the main approaches that will be utilized. Social justice leadership motivates the change process, with change implementation that will forward equity in my educational context. Although this type of leadership is not the focus in moving change forward, it is the impetus for attempting to create change in rural schools in Labrador.

The change initiative in this OIP has two distinct priorities for change, and within those priorities certain skill sets are needed. Adaptive leadership mobilizes people to work within the change process, but still identifies a change leader. The leader as the change champion needs to move others through the necessary components of change. As Heifetz et al. (2009) suggest, although the leader does not work alone and will seek out supporters, there *is* a clear leader who must bear the weight of disequilibrium, opposition, and dissent while forging ahead. So, while working from this leadership approach, building collaborative teams may help advance successful change. Leaders who can establish strong learning cultures do so through engagement and mutual understanding, accountability is a reciprocal thing as Jones and Harris (2014) suggest. In formulating a collaborative effort as such, it will be necessary to be adaptive in diversifying the change plan as needed. Heifetz et al. (2009) offer, “you need a plan, but you also need freedom to deviate from the plan as new discoveries emerge, as conditions change, and as new forms of resistance arise” (p. 31). The adaptive leader would plan, start the change, follow

through with the stakeholders and their needs to get on board with the change and stick with it, supervise teams, then be responsible for holding the accomplished change and adjust as needed.

Participative leadership begins after the adaptive leadership approach has started to mobilize the process. “Participative leadership focuses on the decision-making processes of the group as central with decisions being made through the collective participation of the leadership team” (Parson, Hunter & Kallio, 2016, p. 64). The change process issues will be best addressed with a participatory approach, where varied constituents take on diverse roles. Successful leadership in rural communities is largely dependent upon social capital, and in the formation of positive relationships with various stakeholders, which will be a major component in this OIP. Effective rural school leadership is built upon nurturing and maintaining healthy relationships with stakeholders suggest Preston & Barnes (2017). While adaptive leadership will be used to form and supervise coalitions, participative leadership will be used in the employment of said teams to aid in the change processes.

Creative leadership will be used within the various coalitions once they are formed. This type of leadership can be defined as thinking outside the box and drawing on individual strengths within the coalitions to move change forward. Leadership must be diversified amongst constituents and empowering people to develop their own form of leadership. Creative leadership will be exercised by both the formal change leader, and by the informal leaders who are the stakeholders comprising the coalitions. Some of the ways to lead through creative leadership is to model creativity and risk taking; to relinquish control; using failure as a learning opportunity; and keep referring back to core values (Stoll & Temperley, 2009). Creative leaders recognise the need to influence others so that talent can be released and maximised. This cannot be done in a manipulative way as Harris (2009) tells us, creativity can only really flourish where

the formal leadership authentically and genuinely reflects a desire for the many rather than the few to excel. Creative leaders, who would potentially be all the various stakeholders, need to have an organizational vision that is based upon some moral or ethical purpose, which here would revolve around the issue of rural resourcing. Then leaders in these coalitions would collectively make decision based upon how to enact positive changes to benefit the local school.

Framework for Leading the Change Process

Leading the change for this OIP begins with recognizing the underpinnings of critical theory as it applies to the process, followed by Kotter's Eight Step Model (2012).

Critical Theory

As Steinberg and Kincheloe (2010) state

Critical theory, if nothing else, is a moral construct designed to reduce human suffering in the world. In the critical theoretical context, every individual is granted dignity regardless of his or her location in the web of reality. Thus, the continuation of human suffering by conscious human decision is a morally unacceptable behavior that must be analyzed, interpreted and changed (p. 140).

In essence critical theory means an equal chance and opportunity for all individuals, an "association of liberated human beings, in which everybody would have an equal chance of self-development" (Horkheimer, 1937, p. 236). Critical theory

demands that we acknowledge the socially constructed nature of dominant institutions that benefit the economic and cultural elite. It demands that we always recognize

systemic oppression for what it is and never accept the fatalistic attitude that we can do little to change the current state of affairs” (Rottman, 2001, p. 76).

Specifically, the individuals affected by the decision making of others are the stakeholders this OIP seeks to support. These decisions include the inequitable degree of resourcing for students, and these stakeholders are the students, the school staff and the parents in rural, isolated Labrador schools. In framing this potential change, critical theory and the emancipation of rural marginalized groups must be the foundation for moving change forward. This change proposal is not in the interests of getting more just for the sake of having what the advantaged urban schools have, but instead, to provide all constituents with the same possibilities as more privileged groups. Money and power are often unavailable to individuals in rural isolated areas of Labrador therefore a critical conscious is necessary so leaders can attribute social inequities to forces outside of individual qualities (Watts, Diemer, & Voight, 2011). One of the forces that is difficult to break is inequity in education which creates cycles of poverty and inequality amongst marginalized groups. Even more alarming Godfrey and Wolfe’s (2016) research determined that not only do more affluent groups participate in victim blaming, but individuals living in poverty themselves attributed their circumstances more to their own inferiority and shortcomings rather than any barriers in the system. Although individual factors do account for a percentage of poverty causation, inequities are shaped by processes outside of the individual, such as politics, economics, culture and history. This suggests a pressing need for work on behalf of marginalized groups, as evidently some privileged groups do not see the structural barriers that limit the potential of disadvantaged groups. Unfortunately, some disadvantaged groups are not always aware of these barriers either, which is prohibitive of collective action to attempt change.

Kotter’s Eight Step Model

Keeping critical theory as the thread running through this change process, Kotter's (2012) Eight Step change model as outlined below will be the specific framework used for leading the change process. The importance of the change method being aligned with the change type is stressed by Al-Haddad & Kotnour (2015); however, there is little research on what models and methods align with which change processes. Hallencreutz & Turner (2011) state that "there are no coherent models and definitions of evidence based organizational change best practice to be found in the literature" (p. 65). Therefore, choosing a framework for change can be challenging. As Kotter's (2012) model is focused on creating changes in behavior followed by changes in culture, it is practical for this OIP as the primary change processes involve the collaboration of groups of people, necessitating a focus on making changes in behaviour- meaning leading a collective process of change making through various approaches to leadership. Kotter's model is practical and prescriptive, but the model may require adaptation in some instances depending on contextual variables. Although this is a sequential process, this change initiative would not be a solely a step by step implementation but instead a series of developmental strategies that may not proceed in a linear fashion. As Pollack & Pollack (2014) suggest, "the distinction being made is between viewing change as one cohesive process or the sum of many coordinated processes" (p. 61). The guiding coalitions and groups will vary in terms of acceptance of the change, time on task, ideas, organization, etc. and the eight-step process will need to be applied to individual groups as well as to the larger overarching organizational change vision, all working in tandem. Calegari, Sibley & Turner (2015) propose that Kotter's (2012) process is not only a roadmap for effective organizational improvement but also for creating and sustaining participant engagement in the process, a key ingredient to this OIP's potential resourcing change. This model provides clear and concise procedures for change management but also accounts for emotional and

behavioural factors as well. This is important in any change process, but explicitly so in one such as this in which all potential changes would be forwarded by stakeholders and stakeholder groups.

Applying a critical stance because of the inherent inequities in this OIP is the *why* we need organizational change, and Kotter's model will be one of the strategies for *how*. The model, as outlined below first aims to break the status quo, and the remaining steps incorporate new practices into the organization. As this change process requires an enormous break in the status quo, it is important that the proposed change plan include multi-steps to achieve this. Realistically, this OIP focuses on the first year of change with potential future years' dependant upon outcomes, but we must concede that changing the status quo will take time and is not an expected result of one year.

Establishing a sense of urgency. Creating urgency is necessary in the change management process as it gains the necessary cooperation of the stakeholders. As Kotter (2012) suggests, if complacency is high and urgency low, transformations go nowhere as so few people are interested in working on the problem. However, with current changes in Labrador, staff are becoming dissatisfied with the status quo. "Increasingly, those living in rural areas are not content to accept the metrocentric vision of policy that tends to end up either misunderstanding or ignoring significant social and economic questions that plague rural communities" (Corbett, 2014, p. 8). The urgency is beginning within educational organizations in these areas, but it will be necessary to address complacency in the remaining stakeholders. Kotter (2012) suggests eight ways to create urgency (p.46), two of which could be employed in this context. First, by creating a crisis through illustrating the large gap between the resources in rural versus urban schools. Then "convincing people that the status quo is dangerous and unsustainable in the longer term

and that the way business is currently done is limited and needs to be changed for everyone's benefit" (Crouzet & Parker, 2013, p.948). Secondly, Kotter's suggestion of sending more data or information which may cause some discomfort with maintaining the status quo.

Creating the guiding coalition. Kotter's second step of creating a guiding coalition will consist of establishing different groups to address the Problem of Practice. These groups include a rural school committee including as many rural school leaders on the committee as possible, and various local fundraising and/or grant writing committees. As there are "certain essential components that must exist and processes that should occur to support a developing coalition toward sustainability" (Downey, Ireson, Slavova & McKee, 2008, p. 138) the groups will be formed using the Cohen, Baer & Satterwhite's (2002) Eight Step Guide for Developing Effective Coalitions. These steps are: analyze the program's objectives and determine whether to form a coalition; recruit the right people; devise a set of preliminary objectives and activities; convene the coalition; anticipate the necessary resources; define elements of a successful coalition structure; maintain coalition vitality; and make improvements through evaluation. As suggested by Downey et al. (2008) once the teams are established the development should not be headed up by one leader, rather a group of people should assume leadership responsibility for the coalition. Kotter (2012) states that these coalitions must involve members with position power, expertise, credibility and leadership skills, so it will be important to ensure coalitions are comprised of an effective mix of stakeholders. These steps will help effectively establish these committees with the right mix of people, organize the objectives, and have the flexibility to experiment with different groupings, making changes where necessary. The success of the groupings will need to be determined once the initial coalitions are made, only then can assessment and changes be made.

Create a vision. After the creation of the coalitions, groups must establish a vision around the change initiative. As Kotter (2012) states, the vision clarifies the direction, so all team members understand the change they are trying to make. The characteristics of an effective vision as outlined by Kotter (2012) are imaginable, desirable, feasible, focused, flexible, and communicable (p. 74). In order for collaborative teams to feel ownership of the change “it is important to tap into individual creativity and to pool the ideas of key players into a group vision that has more potential to be achieved if it is a product of the leadership team, and not that of one or a few principal leaders” (Francis, 2018, p.1). A co-created vision would conceivably lead to effective day to day decision making to further the change process. The leader’s role in team vision creation is to inspire stakeholders to create necessary change and to maintain standards of accountability while doing so. As an adaptive leader, I would aid in this vision creation by consistently and repeatedly communicating the reasons for making this change. Reminding constituents that this awareness campaign and resource procurement is being implemented primarily for the benefit of rural students and ensuring that the co-created vision reflects this.

Communicating the vision. To communicate the vision, quality, frequency and intensity are important. Kotter (2012) suggests that a common understanding of the vision and its goals is necessary for organizational transformation. This understanding can be achieved with regular communication through various media. “Internal and external communication is critical to the success of the change effort” (Crouzet et al., 2013, p. 951). While Atkinson (2005) stresses the importance of determining the most effective way to deliver the appropriate message in the right way to the right people. Leader’s behaviour in communicating the vision must be open and trustworthy as two-way communication is necessary. In addition to memos, texts, emails or newsletters that may be sent out, there is a need for dialogue in order to understand any

confusion regarding the vision. Face to face talking or talking facilitated through technology in which you can see each other, is important as some nuances might be missed in other types of communication. Kotter (2012) also suggests that leader behaviour must be consistent with the vision. If behaviour is inconsistent with key messaging, it will undermine the change effort.

Empowering a broad base of people to take action. Empowering employees is a step that Kotter (2012) explains as working to “empower a broad base of people to take action by removing as many barriers to the implementation as possible at this point in the process” (p. 106). Crouzet et al. (2013) found when people are not involved in the change process, it immediately creates conflict, hostility, lack of cooperation and a reduction in productivity. Active participation in this change process is key to effectiveness, and in this OIP barriers may consist of scheduling conflicts, geographical and technical issues, and stakeholder conflict within coalitions. These barriers would need removal, or support from the change leader, along with the inclusion of all stakeholders and shared decision making.

The rural committee will be comprised of various leaders from rural schools who will be well versed in distance communication and dealing with issues that arise due to technology or isolation. Once recruited they will be mainly independent in making schedules happen, with support from the change leader where needed. The local fundraising groups may need more support in resolving conflict within their groupings. As most townspeople have grown up in these rural areas, there are long established patterns of behaviour between the members. Forming groups that work well together will be a key area in establishing a solid base of people who can effectively take action.

Generate short term wins. Early wins create confidence and leader credibility, as change processes are lengthy and motivation can be lost without quick successes in the process.

Kotter (2012) tells us that short-term wins need to be unambiguous, visible and clearly related to the change. Van Buren and Safferstone (2009) identified five features that short-term wins should have in order to be effective; they must have value, they cannot be costly, they must have a collective impact, give the opportunity to learn about the teams, and the opportunity to engage with each other. Although short-term wins reinforce the vision, leaders must focus on the larger picture, and maintain short term wins as just a step in the change process. In the context of the rural school fundraising groups these wins might consist of stakeholder gathering to view the resources procured for the school by the change initiative or see a presentation of opportunities students had taken advantage of due to increased funding. The rural school committee members would see these wins with the collaboration of all involved stakeholders, such as staff and board and union representatives.

Consolidating. Kotter (2012) suggests that this is the crucial moment to maintain a new equilibrium and not to let up on the change process or “critical momentum can be lost and regression may follow” (p. 139). This step requires more change, more help, leadership from senior management, project management and leadership from below and the reduction of unnecessary interdependencies. If resistance arises Crouzet et al. (2013) suggest negotiation, covert manipulation, and coercion of the stakeholder in order to move change forward. It is important in this step to address dissatisfaction with the process in order not to derail the initiative. In order to do this, all the committees must be effectively working toward the change process with very little trouble. This means the rural school committee must be meeting regularly and be moving forward with the awareness campaign, and the fundraising groups must be fundraising successfully with support from the change leader and all other participative leaders. If there is conflict, the change leader must assess the situation and act as necessary to remove the

problem. This may mean discussions to determine what each stakeholder wants, reassignment of duties, negotiations, etc.

Anchoring new approaches in the culture. As the culture of an organization is its shared values and norms of group behaviour, the new processes that are in place to create change need to become accepted and indoctrinated as part of the shared values, as well as the behaviours that support these values. Leaders rewarding behaviours that forward the change process values over time will help add these new approaches to the culture and allow them to become socially accepted. “This involves redefining roles and undertaking the promotion of new practices, and establishing team norms, giving feedback and revising reward systems, and developing a revised culture, revising monitoring and performance measurement systems and development programs” (Crouzet et al., 2013, p. 954). As Kotter (2012) suggests culture change comes last in the transformation process, and only after the implemented changes are viewed as necessary and work better than the previous approaches.

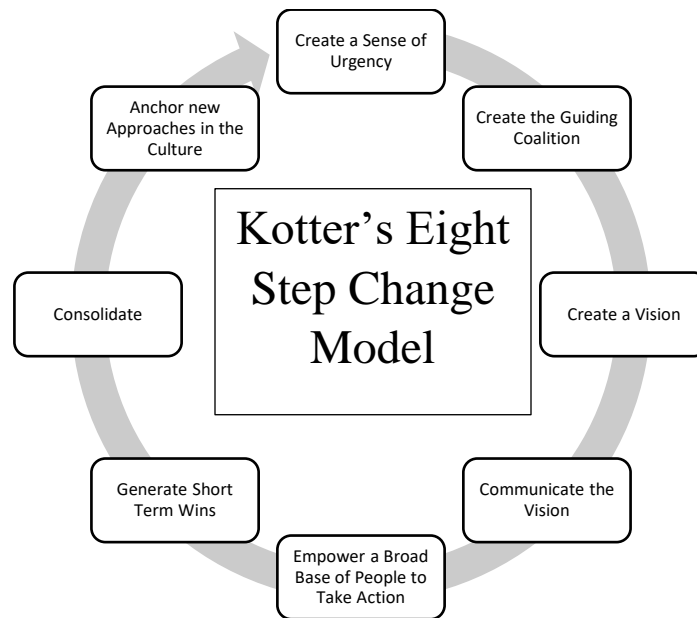


Figure 2.1. Kotter's Eight Step Model adapted from Kotter (2012).

Critical Organizational Analysis

In moving forward with positive change within geographically isolated rural schools in Labrador, there is a need to identify where change can occur. Currently rural schools do not collaborate on any sort of regular basis. Communication is limited to infrequent PD days throughout the year, or occasional emails. The big issues in rural communities are often repetitive themes when rural educators do meet, though no concentrated collective effort has ever been employed between rural schools to forward a change. Essentially rural schools do not work together and are separate entities where organizational processes are managed alone. In addition, some local communities are not aware of the resourcing discrepancies between urban and rural schools, nor that there is a lack of resourcing within the local school. To analyse how rural schools' function and how to achieve the vision of School Board X, Nadler and Tushman's Congruence Model (1980) will be used.

For educational organizations to be effective, many different groups must work together to achieve goals. Each group is reliant on the levels above, below, and alongside to perform certain duties and assume specific roles for the organism of education at large to work. As educators, it sometimes feels like we are cogs in the wheel of public education, and in order to analyse efficacy within each organization, each section must be taken apart to determine what is working and what needs to be changed. This congruence model "puts its greatest emphasis on the transformation process and specifically reflects the critical system property of interdependence" (Nadler & Tushman, 1980, p.38). As interdependence is a key issue in the resourcing of rural schools, the analysis of inputs and outputs through the transformation process will reveal how the parts "fit or don't fit" (Cawsey et al., 2012, p. 66). Before we examine this model, Nadler and Tushman (1980) suggest identifying the symptoms, to determine what is

occurring to clarify the problem that exists in the organization. Within the parameters of this congruence model, an analysis of the present policy regarding the per student funding formula will be employed. This preliminary analysis is necessary to promote greater social justice amongst marginalized groups in rural settings and highlights the discriminatory nature of seemingly neutral policies that further subjugate an already disadvantaged group. Looking at the current funding formula from a critical perspective will illuminate whether it is meeting the needs of all students in the province.

Identifying the Symptoms

A myriad of symptoms exist that indicate a problem is occurring in rural schools in Labrador. Some rural schools present low student achievement in comparison to urban schools, but the evidence is inconclusive as rural schools “actually perform well considering economic conditions in these communities” (Corbett, 2014, p.10). However, low SES is commonly found to affect student achievement, “there's long been a clear connection between families' socioeconomic status and students' academic achievement” (Petrilli & Wright, 2016, p. 47). Rural students are far more likely to come from low SES backgrounds (Canadian Council on Learning, 2008; Cartwright and Allen, 2002), therefore, it may be that lower student achievement is not a result of a rural education, but instead of living in poverty and the associated social problems that are correlated.

Staff burnout is another symptom commonly discussed in rural schools, though the research is scarce. Educational staff burnout is a frequent theme in the literature; however, there are few direct studies on the unique difficulties facing rural staff and the potential strain of living and working in these areas. Lack of research generally means lack of policy, and there is no health policy that specifically targets the particular challenges of rural teachers, “occupational

health policy needs to recognise and provide support for the mental and emotional costs associated with work in isolated areas” (Newhook, 2010, p. 90). Despite the dearth of studies to confirm this phenomenon, we might assume the extremely high turnover rates, discussed below, are an associated side effect of teacher burnout.

High staff turnover in rural areas has become a common occurrence (Arnold, Newman, Gaddy & Dean, 2005; Browne-Ferrigno & Maynard, 2005; Fusarelli & Militello, 2012; Lowe, 2006; Oakley, 2012; Wallin, 2009; Wildly & Clarke, 2005). Some reasons cited for this high turnover in rural areas are: geographical isolation, heavy workloads, multiplicity of roles, unrealistic community expectations, personal loneliness, professional isolation, lack of resources, and lack of staff.

In addition, there continues to be frequent informal communication among rural staff that the availability of teaching and learning resources are unacceptable. These symptoms indicate that an analysis is necessary to examine organizational components and discern the foundation of the problems, and potential solutions to resolve them.

Inputs

Inputs are the major reason rural schools are currently experiencing a resourcing issue. The environment in rural schools is represented by the actual geographical location, along with the outside environment consisting of the school board and the decisions that affect rural schools. In analyzing these environments contextual differences including resource availability and capabilities will be examined, along with board expectations and provisions. The quality and amount of resources in rural schools will be analyzed, along with the history of the school. Historically, rural schools were able to meet school board visions and objectives, but with

increased and more complicated expectations, an analysis of current organizational functioning is required. As rural schools are not often considered during changes in curriculum and policy (Howley, 1997; Wallin, 2008), examining the contextual environment and what is specifically needed to tailor education with respect to the local realities is necessary. In my current school, the inputs are the per student funds given to the school. The local community does very little to support the school, partly because of the poverty level within the area, and partly because historically they were not expected to contribute. In fact, the school has always been more likely to give to the community and its members than vice versa.

Outputs

As the outputs of an organization “are the services and products it provides...the satisfaction of organizational members, the growth and development of the competencies of the organization and its members, and customer satisfaction” (Cawsey et al., 2012, p, 69), with regards to this OIP an examination of student achievement considering poverty levels, and measurement of staff and student growth and fulfillment is required. Some research (Corbett, 2014; Surface & Theobald, 2014) suggest that small, rural schools’ achievement is higher than urban schools if the enrolled students live in poverty. Assessing outputs on a contextual basis may help forward the change process, and specific areas to target during the process. Data on achievement between rural and urban schools is not publicly available in Labrador; however, all schools are required to submit achievement indicators on a yearly basis determining what percentage of students are at, below or above expected levels. This data is compiled into a report for each school. Access to these reports is difficult but may determine the academic difference between the rural Labradorian schools, and those in more urban areas.

Tasks

The tasks of the organization are the specific activities that need to be completed in an organization, in this case, educating students. An analysis of organizational tasks would include what is needed to perform this task, and the level of resourcing needed to adequately perform task completion. As curriculum changes in recent years have become hands-on and play based, an increase in resources is needed to put curriculum suggested activities for teaching and learning in place. Analysis will determine if reasonable resources are available to ensure outcomes are effectively taught and learned.

Formal Organization

The formal organization includes “the range of structures, processes, methods, procedures, and so forth that are explicitly and formally developed to get individuals to perform tasks consistent with organizational strategy” (Nadler and Tushman, 1980, p. 42). The formal organization in this change proposal is the school board, and specifically in this OIP the funding formula, and how it affects task performance in rural Labrador schools. Although “the absence of senior management awareness and support is normal during the early stages of change” (Cawsey et al., 2012, p. 301), assessment of the gaps in this knowledge are needed to determine what information needs to be presented to the central school board to further the change process. Here a critical policy analysis would be advantageous.

Critical Policy Analysis

Johnson & Howley (2015) tell us that policies need to attend to the differences in rural schools, both the strengths and opportunities, and the challenges. Critical policy analysis is a process that is used to illuminate discrepancies in structures and how they sustain inequities.

It must assist us both in understanding the complexities and power relations of

educational policies and practices, and, at the same time, employ critical approaches to document the interruptions, actions, and movements that continually challenge the dominant forms of policy and practice that generate and/or reproduce inequalities” (Apple, 2018, p.10).

In the examination of the current policy that funds schools, policy analysis will

enable deeper and broader understanding of educational issues, and allow the researcher to investigate and question the complexities of educational issues, such as why certain changes are occurring within the field of education, why certain options tend to be chosen as policy options and solutions, and how such pathways have impacted or are likely to impact children and their communities (Diem, Young, Welton, Mansfield, & Lee, 2014, p.1085).

Diem et al. (2014) suggest that critical approaches to policy analysis consists of five categories: the interrogation of the policy processes; examining the roots and development of policy; uncovering elements of social stratification; the distribution of power; resources and knowledge in policy creation and implementation; exploring the broader and deeper effects of policy work, such as the institutionalization of the dominant culture; and promoting agency, advocacy, resistance and praxis. The analysis of rural resourcing policy will address some of these categories, and how policy might affect social justice in rural areas. As the current policy resources schools on a \$250 per student basis, with the implicit expectation that schools will fundraise to meet other needs, we can see how low population rural schools in poor communities will fare.

Informal Organization

The informal organization in this analysis would be the rural school itself, the community it resides within, and the relationships that exist in that environment. These include the leader's behaviour, group dynamics, and communication and influence between constituents. In this OIP, the informal organization needing analysis are the relationships between and among coalition members. Examination of these informal structures would determine if the current informal structures can increase capacity to enable task performance. The coalition members would be the local school staff and community members.

Additional Steps

Three additional interdependent steps are needed to assess the problem, and understand the complexities surrounding why the resourcing problem might be occurring in rural areas.

Assess congruence. These four component assessments are necessary in this OIP, but they do not work independently. We must further examine the interaction between all sections to determine where congruence is not occurring, and what to attempt to change. Organizational effectiveness can be determined by congruency between the external and internal environment of the organization. This is a question of diagnosis regarding the organizational environment to conclude what is working effectively, and what isn't.

Generate hypothesis about causes of problems. Once the lack of fit in the congruence analysis has been identified, the problems will become clearer. However, this does not mean we will know the causes of the problems. Therefore, generation of hypotheses regarding the problems in the organization is necessary. The symptoms discussed above suggest a misalignment between inputs and outputs as evidenced by lower student achievement, staff burnout and high turnover rates, as well as informally expressed dissatisfaction with the status

quo. Although these symptoms stem from a multitude of causes, and there are specific economic and sociocultural difficulties in each rural community context that compound the issues, most rural challenges remain fixed. As suggested by Preston et al. (2013) the small amount of research available on rural schools' point to leadership challenges consisting of community obligations and scrutiny, diverse roles, heavy workloads, lack of professional development and resources, gender discrimination, school accountability and change. As symptoms increase in rural Labrador, challenges remain the same, except for school accountability and change. As the curriculum and teaching methods change, and accountability standards increase, outputs in rural Labrador are decreasing. This leads to a hypothesis that an increase in demands from school leaders has not been preceded by an increase in support to meet those demands in many areas, and for the purposes of this OIP specifically in the area of resourcing.

Components of the Congruence Model

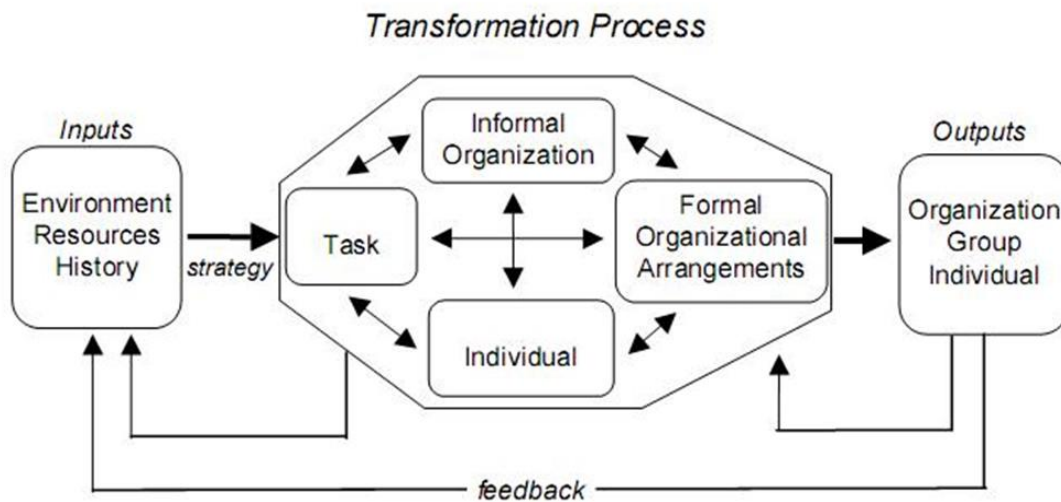


Figure 2.2. Adapted from Nadler and Tushman Congruence Model for Organizational Analysis adapted from Cawsey et al. (2012) and Nadler and Tushman (1980)

Planning choices. Potential solutions will be discussed in the following section of this OIP, and how they might be implemented.

Possible Solutions for the Rural Resourcing Issue in Labrador

The potential solutions for lack of resources in rural schools in Labrador center around one key idea, getting an equitable amount of money into the rural schools to create fair resourcing. As outlined in previous sections, schools are funded on a per student basis and low enrolments mean little money. This combined with sparsely populated communities and high poverty levels makes fundraising very difficult in some areas. Three possible solutions to this problem are: policy changes or changes in the funding formula, or supplemental amounts given to rural schools; redistributing some of the fundraised income from larger schools to smaller; and thirdly, increasing fundraising capacity in rural schools.

Changes to the School Funding

The current per-student funding formula would require changes to reflect the needs of rural isolated schools, and to provide equitable education for all students. This might consist of a new funding formula, or additional monetary support to small schools. Ideally this would be somewhat contextually based, as some rural schools in Labrador have greater need than others, though none are as well funded as more urban schools in this area.

Resources needed. This solution would require three resources, time, human and technology.

Human resources. A rural school committee would consist of interested members from all rural schools in Labrador. Optimistically we might have a representative from each of the ten targeted schools. This might prove difficult given the low-staffing numbers, and heavy workload

already carried by this group, so realistically we could anticipate five to seven members with the hopes of increasing numbers in the future. In addition, members would be requested from the NLTA and School District X, and meetings would be set up to discuss funding changes or policy changes. This would require substantial investment from all individuals.

Time resources. Time would be a significant factor for this solution. Time would be required from each member of the rural school committee on a regular basis to organize plans for approaching the central board. Later there would be a substantial amount of time needed to meet with central board and union members to forward change initiatives.

Technology resources. Functioning technology would be necessary for online meetings and collaborative efforts as it would not be possible for members to travel for regular meetings with other rural school leaders due to the prohibitive cost. Technology would also be needed to create presentations and access to various types of communication.

Benefits and limitations. The benefit of making funding changes that would either change the per student funding ratio or augment the funding available to rural schools would be increased resourcing in rural schools, and potentially achieving the school board vision of an equal education for all students. This in turn could affect student achievement and the future life possibilities for students living in poverty. In addition, this change would assist in alleviating the heavy burden that school staff bear of attempting to roll out curriculum goals and activities without the necessary resources. The consequences might be less money for urban schools or other educational board directed initiatives, which could create discontent amongst a large group of powerful and influential people who may view the equitization of resourcing rural schools means disadvantage for the students in urban schools. There might also be difficulty in

determining a fair funding formula, or how much extra money to give individual rural schools as some have a greater need than others and live in lower SES communities.

Shared Fundraising Between Schools

This potential solution would see urban schools in Labrador sharing a percentage of their fundraised income with rural schools. This could be another board directed policy change, or a voluntary action by staff in larger schools. This would require, in addition to the resources listed below, a commitment from larger school fundraising groups for social justice and equity based financial re-distribution.

Resources needed. The resources for this solution would be time and human, with possibly the need for technology and contextual school information.

Human resources. Human resources would be needed to determine a reasonable percentage to be removed from urban school fundraised amounts, and to determine the funding needs of each rural school. A formula could be used here, taking into consideration all rural school income and potential income. Staff would also be required for tallying of fundraised amounts, and percentages to be redistributed. There would also be a need for personnel to complete the delivery of funds through e-transfers or otherwise.

Time resources. Time would be required before shared fundraising could commence to determine the amount that each rural school could receive. Time would also be needed to tally fundraised income amounts, percentages for redistribution, and delivery of funds.

Technology resources. Technology would be needed for the emailing of funds, and for communication between schools.

Information resources. Staff responsible for redistribution would need information on exact funds raised throughout the year. They would also need contextual information about each rural school. Preferably a formula would have been pre-established addressing higher or lower needs in each school, and a percentage of funding given out according to this information. This formula would be based upon all income available within each rural context.

Benefits and limitations. The advantages would be increased resourcing in rural schools thereby creating a more equitable educational environment. Again, as with the consequences of potential policy changes, discontent might be created amongst urban school groups. There is also the possibility that parents would fundraise less for urban schools in knowing that the money was not directly benefitting their children. This solution does not fully address discrepancies between schools unless money was distributed on a contextual basis. This would be labour intensive and time consuming.

Increased Fundraising Capacity in Rural Communities

Increased fundraising would consist of the formation of fundraising groups made up of local community members and outside of community members to organize fundraising initiatives within the local towns, in larger centers and online, in combination with volunteers for grant writing and follow-up.

Resources needed. This solution would be arguable the most resource and labour intensive of all three. It would require a substantial amount of time, human, technology and financial resources.

Human Resources. Large amounts of human resource supports would be required with this solution. Staff members and community members would form various fundraising groups to initiate events within and outside of the community, as well as online.

Time resources. Considerable amounts of time would be needed to organize groups and organize events, as well as host events and follow up activities. These would consist of money tallying and any clean up, plus debriefing meetings on the success or failure of each initiative, and any necessary changes to be made.

Technology resources. Technology would be essential for this solution if online fundraising initiatives were to be implemented. Volunteer grant writers would also require technology to fill out and follow up grant applications.

Financial resources. Possible financial resources needed would be funds for larger future fundraising events to buy decorations, prizes, food etc. to set up the event.

Benefits and limitations. The benefits of this solutions would be the flexibility to undertake many different initiatives to see what works in varied contexts. Another benefit would be further involvement of the local community in school support contributing to community spirit. Consequences of this potential solution might be stakeholder disagreement over fundraising events and organization. Increased workload of staff, and dependence upon community members to fund the schools equitably. Another possible limitation might be stakeholder disagreement on how the funds should be spent. Having a personal investment in the fundraising might see constituents wanting to take ownership of what the funds are used for, this could cause friction between individuals.

Most Favourable Solution

Policy or funding formula changes, or additional provisions for rural schools would be the better choice for a potential solution. These type of changes would require no increase in workloads for stakeholders which is a considerable challenge in other suggested solutions. In addition, this solution would be less likely to create animosity between schools as might occur if funds were taken from the fundraised income of other schools for redistribution. Also, this solution prevents dependence of the local school upon other schools, or community members to fundraise for the local school to be equitably resourced. In order to begin the process of policy change a rural school committee to raise awareness of the unfair funding of schools will be implemented. Once awareness is raised with the central school district, influential board members may begin the process of policy changes to support rural schools.

Realistically, though policy changes might be the most desirable of potential solutions, the most practical would be to attempt to increase the fundraising capacity of rural schools through fundraising committees. This solution could be initiated immediately and with no need for substantial commitments from groups outside of the community. Also, school leaders would have almost daily access to individuals within the local area to forward and control change implementation. The chosen solution (in conjunction with the formation of the rural school committee) would be the implementation of local fundraising groups to organize and hold various events within the community, outside the community or online, with the addition of community members to handle grant writing and follow up.

Leadership Ethics and Organizational Change Issues

This OIP is underpinned by adaptive and participative leadership approaches which allow for a social justice lens and the opportunity to add creativity to the planning process. Applying an ethical stance to the problem of practice is vital to finding ways to address its inherent issues.

Social justice, being borne from the ethics of equity is the basis for potential change in rural schools. Attempting this change process itself has ethical roots. As Rude and Whetstone (2008) indicate, one of the most basic ethical concepts that must be considered is *negligence*, which is to ignore or overlook responsibility to provide students with the essential service of an equal education. Adaptive leadership requires ethical consideration as it comprises the need for influencing stakeholders to change their values, and subsequently the culture of the organizations. Participative leadership ethics in this setting involves not only the ethical leadership of a coalition but has the added dimension of potentially partially addressing the ethical dilemma of rural leader workload.

Social justice leadership is the foundation of this change process. This type of leadership is based upon the ethical principles of emancipation of marginalized groups. However, the components of the change processes potential solutions require ethical considerations as well as being heavily contextually-based and require the participation of many stakeholders. As Capper and Green (2010) point out ethical leadership can be

...understood as occurring in the space between people embedded in context and exercised via a collective political project toward the goals of equality, justice and emancipation...(and) the potential to resist existing systems of power that close us off from generosity to others and normalize the oppression of subdominant groups (p. 359).

The resourcing of rural schools does not appear to be an ethical dilemma at first glance, but when examined in the light of social justice and in providing an equitable education for all we can see that there is a critical component folded in. Ehrich, Harris, Klenowski, Smeed and Spina (2015) suggest that ethical leaders promote social justice and student achievement “especially (for) those who are least advantaged and marginalized by the current system” (p.

199). As most rural schools in Labrador are situated in high poverty areas, with a large percentage of Aboriginal students enrolled, the lack of resourcing within the local school has a significant impact on students.

Ethical considerations in this OIP are also motivated by social justice leadership in the interest of enfranchisement of other marginalized groups. One of these groups are the parents in rural areas. As Clark (2009) states

...it is vital that principals located in rural, remote and isolated environments are able to take advantage of powerful opportunities for change and improvement, because parents (and students) may have little option but to accept the educational provision on offer from the local school (p 69).

When parents have but one choice of school to send their children to, equity-based resourcing takes on further ethical dimensions. All children have the basic right of an equal education. If they are not receiving that in a rural school, parents have no alternative as geographic isolation prevents changing schools, and poverty prevents relocation.

Ethical considerations also apply to the potential solutions. When we examine that the two most desirable solutions are reached by the formation of committees, the treatment of those people must have an ethical base. Ethical considerations are important in view of Northouse (2016) suggestion that adaptive leadership is follower-centric and is about changing others' values. "To make a change in other people carries with it an enormous ethical burden and responsibility" (Northouse, 2016, p. 336). As this ties in with the previously discussed eighth and final step of Kotter's (2012) change model, anchoring new approaches in the culture, we know that values and culture are not easily altered. Only through time and seeing clear connections

between organizational improvement and new actions will values change and consolidate.

Heifetz, Grashow & Linskey (2009) suggest three ways to negotiate ethics within the parameters of adaptive leadership: calculate the potential damage to others, assess the damage to your self image and espoused values, and to ask do the means justify the ends? This OIP is dependant upon stakeholder involvement, the changing of stakeholder values and of school and community culture in order to promote the critical improvement of rural school resourcing. “Instead of attempting to change behaviour by imposition and coercion, what is required is an approach to change which promotes ethical behaviour and allows those concerned to change of their own free will” (Burnes, 2009, p. 361). Therefore, in using adaptive leadership to form effective coalitions, ethics must be considered in attempting to change personal values and the culture of the community, while continuing the change process. However, if the stakeholders do not change of their own free will, we do need to think about the end result which is that no change will occur. If this is the case some form of coercion or manipulation may be necessary within the boundaries of ethical leadership, meaning no one would be hurt but rather gently convinced to proceed in the intended direction, or gently removed from the change process.

Within the context of creating solutions, the heavy workload of rural leaders would also require ethical attention both in terms of potentially creating more work through the solution process. “Rural principals struggle with fulfilling their full-time administrative duties, while carrying heavy teaching loads, sometimes across multi-grades” (Preston, Jakubiec & Kooymans, 2013, p.4). This is sometimes referred to as the “double load” of balancing heavy teaching responsibilities with leadership demands ((Dunning 1993; Hodgen and Wylie 2005; Murdoch and Schiller 2002; Southworth 2004; Wilson and McPake 2000) which is “an unrealistically broad repertoire of professional responsibilities” (Clarke, 2009, p. 280). This is combined with

professional isolation as suggested by Southworth (2004), and exceedingly high community expectations from the school leaders (Halsey, 2006). Sustainable leadership (Hargreaves and Fink, 2006) may be difficult to achieve in this context, and rural school leaders are at risk of burning out.

Participative leadership is based upon the ethical principles of care and justice (Starratt, 1996) as it is a shared approach to leadership and decision making. It also plays a part in contributing to equity as it spreads the workload of rural school leaders, while working toward effective change. In change processes “responsibility should be connected to some kind of stakeholder ownership... as people are generally more responsible for things over which they have some control and influence (Rok, 2009, p, 469). Participative leadership in this context is multi-dimensional in that it not only addresses the leader’s ethical consideration of stakeholder voices, but also has the potential as an approach to alleviate some of the ethical concerns of rural leader workload.

In discussing the workload, burnout and high turnover of rural staff, another ethical problem emerges. That is the likelihood that the most experienced and qualified teaching staff will not work in rural schools, or will not remain, leading us to consider the ethic of justice and critique (Starratt, 1996). As the best teachers will often leave rural areas, the students are sometimes left with new or unqualified staff for the majority of their public-school education. It is a leader’s responsibility to redress social inequities, so attempting to create change within the working environment of rural teachers might be a starting point for a more equitable organization. This could occur by both easing the undue hardship of the work in rural areas for staff, and possibly by encouraging some of the best teachers to teach in rural areas, and providing incentives to stay for longer periods of time.

Northouse (2016) outlines the principles of ethical leadership as “respecting others, serving others, showing justice, manifesting honesty and building community” (p. 341) which are all integral components of this OIP. School leaders generally have a clear moral purpose and make decisions based upon the best interests of the students, whatever that may be in individual contexts. Rural school leaders have a more complex leadership role, when examining the multi-faceted function they play in these areas. In summary, as Rude and Whetstone (2008) suggest, “It is up to ethical leaders in rural communities that are far away from the mainstream of urban life to take a piece of the mess and not wait for higher authorities to figure out the answers” (p. 16).

In the next chapter we will examine the implementation of this change, how it will be communicated to the various stakeholders, and the evaluation of its success. This will in turn guide us to the next steps of the change process, and what components should be kept and those to be adjusted.

Chapter 3: Implementation, Evaluation, and Communication

Chapter three outlines the dual change plan of increasing the awareness of funding issues in rural isolated schools in Labrador while simultaneously improving the level of resources within these schools. This will occur through the development of a rural school committee and by increasing resourcing capacity through the formation and collaboration of local fundraising groups. This chapter describes how the change will be implemented and evaluated for the first year and potentially on a continuous basis over three years and beyond. Specific plans for communication to various stakeholders on the need for change, the enactment of change processes and the ongoing nature of resource procurement are also outlined. The implementation and evaluation of this OIP will be achieved through using a combination of Kotter's Eight Step Model (Kotter, 2012), the Plan, Do, Study Act cycle, formerly known as Deming's scientific method (Moen & Norman, 2010) framed by the principles of adaptive leadership, in combination with participative and creative leadership.

Goals and Priorities

The main goal of this change process is the advancement of greater social justice for marginalized groups in rural areas. The priorities are the implementation of various committees to increase resources as one facet in the complexity of social justice realization. As chapter one outlines, this OIP is influenced by a structural and political frame (Bolman and Deal, 2013), and is based in critical theory which evolved from Max Horkheimer's work in this area. These frames illuminate the unintended consequence of educational inequity for rural schools since the needs of rural schools are not differentiated from those of urban schools. This change plan fits into the current organizational strategy as committee formations are supplementary activities to what is already occurring in rural schools, although with a focus on formalizing and increasing

capacity. This plan will lead to an improved situation for many organizational actors through the increasing of resources. The students will experience a broader range of curriculum-based activities through resource procurement, and potentially see an increase in their achievement levels. Staff will benefit from potentially decreased workloads and see a possible increase in the achievement of their students. Community members will be more directly involved in supporting the school with the potential for increased social activity, particularly for those members who are retired or unemployed. From a broader perspective the school board may support the change initiative in different ways once awareness is increased, and this may improve school achievement levels and staff satisfaction within many of the rural schools that receive such support. The current organizational chart will still exist except with a larger focus upon participation in various committees for staff members, which will be further discussed in the limitations section. There are impediments to this; however, the benefit of increased classroom resources may outweigh the challenge of time-consuming committee involvement.

Implementation

Plan

Using the Nadler and Tushman Congruence Model (Nadler & Tushman, 1980) rural isolated schools in Labrador were analyzed in chapter two. The symptoms, inputs, outputs, tasks, formal and informal sectors of these schools were examined in order to generate hypotheses about the root cause of several problems in these contexts. This analysis supports the adaptive leadership skill of *diagnosis* as well, or as suggested by Heifetz et al. (2009) “getting on the balcony” (p. 7) and achieving some distance from the action on the ground. Chapter two discussed the possibility that one of the causes of a myriad of symptoms related to rural school leadership is lack of resourcing in rural areas. Three possible solutions were presented with the

most favourable being a two-pronged approach of creating a rural school committee to raise awareness among school board members and the NLTA about the issue, and to increase the capacity of rural school fundraising through adaptive and participative leadership by the formation of several fundraising committees.

Do

Before the initial implementation of the committees, a personal conversation with the assistant director of the local school board branch will be requested. This meeting will be to seek support from the Labrador branch and make an effort to maintain good relationships in the local area while keeping all colleagues informed of the intention of making a change in the rural schools.

The implementation of these committee-based potential solutions will occur in this do stage of the PDSA cycle with elements of Kotter's Eight Step Model (Kotter, 2012) weaved throughout. The first agenda item to be actioned is the formation of the rural school committee. A call for interested parties will be presented in the monthly NLTA bulletin, several copies of which are distributed to each school, along with personal emails to rural school administrators and teachers for expressions of interest. These will be sent out in September of the first year. This request is aligned in part with Kotter's (2012) first step (creating a sense of urgency) by generating a greater crisis within rural school staff through further illustrating the lack of resources in some schools and the need for a change in the status quo. The rural school committee will be established in the fall with weekly meetings held through skype to create a plan of action. The collective work of colleagues will create a schedule of items for presentation to the NLTA and central school board representatives, with the potential support of the local board members. Both the central board and the union will be lobbied during the same timeframe

to determine who the best individuals are within their organizations to participate in meetings with the rural school committee. Particular attention will be paid to the appropriateness of individual rural school member contributions for this rural committee, as certain skill sets will be required. Members who are influential within their educational communities, and those with connections to valuable key figures will be highly solicited for this committee. The forwarding of the issue of rural school resourcing will potentially be a continuous effort over many years; however, our focus for this OIP is on year one. This will begin with a presentation of the resourcing issue in the fall of year one and proceed with areas for debate about potential solutions to be addressed as they arrive through the board and union representatives.

Concurrently with the formation of the rural school committee, various fundraising committees will be formed, beginning initially with the local school staff. A large general town meeting will then be held to petition community members to volunteer to be a part of fundraising efforts for the school, again with reference to Kotter's (2012) initial step (creating a sense of urgency). Once a group of interested people has been established, subsequent meetings will be held to divide the members up into suitable groups using an adaptive and participative leadership approach and finding leaders for each of the groups based upon interest and skill level. Leadership will be shared throughout the groups at various times however. Once these groups are formed, each one will meet individually to determine what types of fundraisers they would like to be responsible for, plan, and carry out. Each group will be asked to communicate regularly with the with me as the school administrator and facilitator of the change process to ensure the appropriateness and feasibility of each suggestion. These events will be monitored for effectiveness and sustainability through the use of the PSDA cycle and adaptive leadership as will be further discussed in the monitoring and evaluation section.

The formation of these different committees reflects Kotter's (2012) step, creating a guiding coalition. The next three steps of this model (creating a vision, communicating the vision and empowering a broad base of people to take action) will occur in both the rural school committee and the volunteer groups, as discussed in chapter two. Once the initiatives have been put into place, Kotter's (2012) next step (generating short term wins) would be utilized for celebrating and continuing to reach for the group created vision focused on increasing resourcing.

Study

The effectiveness of this OIP will be measured in two ways, first by collecting student achievement data before and after the increased resourcing initiatives first year. This will be done by each involved school on an individual basis. Inter-school discussions may then occur to compare achievement levels, and if they believe increased resourcing had a corollary effect. The second measurement will occur by assessing the workload levels of rural school staff, and their opinions on the increased resourcing's effect on their ability to achieve the School Board X' vision. This will be accomplished through the distribution of surveys before, during and after the first year of this OIP agenda. These surveys will be anonymous and submitted through an online database such as SurveyMonkey thereby decreasing the possibility that results could be skewed due to change leader positional influence.

More practically, the effectiveness of the OIP will be assessed through staff at individual schools, by the amount of resourcing available in the school, including tangible items and available funds for curriculum-based activities.

Fundraising groups will also have to be monitored for successful collaboration, and

satisfaction concerning their roles within each committee. The monitoring and evaluation of this OIP will be addressed more fully in the next section.

Act

Upon examination of the data collected, and upon the amount of resources procured through the various initiatives, a decision will have to be made to determine if the work of the committees is sustainable and effective. Following this, another decision will be made to ascertain whether to continue with the initial plan or to return to the original problem and associated symptoms and adjust the plan. Once the decisions have been made Kotter's (2012) final two steps (consolidation and anchoring new approaches into the culture) will occur based upon successful implementations.

Stakeholder Reactions

As this OIP is heavily reliant on the support of stakeholders, one must consider their reactions and needs carefully. The plan begins with creating a sense of urgency, as previously discussed, to forward a change in the status quo thereby potentially reducing social injustice in these marginalized groups. The most important stakeholders are the students. Although they will not be directly involved in most of the change process, they may be part of planned fundraising events and will be the main beneficiaries if the change is successful.

A key stakeholder is the local school board leader who will be one of the first to be informed of the planned change initiative. Positive reactions and support are hoped for, but adjustment of plans may be necessary if this is not the case.

The rural school committee will consist of rural school staff, who are fully aware of the resourcing issue within their schools, so the sense of urgency that a change is needed is already

present. However, encouragement may be required to organize the collective talent to create possible change. As there is limited staff in these rural areas, all of whom carry heavy workloads, anyone who expresses interest in being part of the committee and can make time to actively participate, will be accepted. This guiding coalition will consist of several diverse individuals with varied strengths. These strengths will be utilized in the planning and execution of the approach to the NLTA and the School Board X awareness campaign, and the committee will need to be mindful of using members with positive connections to school board and union members, as well as those with strong presentation and public speaking skills. Sammons, Day and Ko (2011) report on multiple studies that indicate productive change can only occur through collective capacity, drawing on the numerous abilities available in organizations, rather than simply assuming those within assigned roles can affect change. Most rural staff members will be supportive of this initiative due to its very nature of eventually easing their workload, and its being in the best interests of their students.

Community based fundraising groups will require a more delicate management due to the diversity of individuals who may want to participate. Selection of individuals with strong personalities, leadership skills particularly in the area of communication, and a commitment to inclusion will be necessary to head up individual committees and to advance the adaptive and participative leadership model. Creative leadership will be needed once the groups are formed to create fundraising events that will entice participation from as many people as possible. Committees will be closely monitored for dissent and groupings will be created with the guiding principle that flexibility is key and that group membership can be adjusted. Implementation of clear and consistent communication regarding the reason for initiating this change, as well as the residual effectiveness of the change initiatives will be necessary. Little resistance in the local

community to the idea is anticipated as it benefits the students, though there may be negative reactions to certain types of fundraisers or power struggles within groups, which will be assessed on an individual and ongoing basis.

Engaging and Empowering Stakeholders

These committees will empower staff and local stakeholders to make a positive change within their schools and communities. Each group will be led with the adaptive and participative leadership model giving stakeholders a chance to both lead and be led, depending on preferences and strengths. As part of Kotter's (2012) change model step, empowering a broad base of people to take action, active participation from stakeholders is necessary to the success of the change process. Therefore, all stakeholders need to be given a voice and barriers that prevent involvement must be removed, as discussed in chapter two. The visibility of an increase in school resources will build momentum and generate small wins (Kotter, 2012). This in turn will also build community spirit

Implementation Issues

It is possible that there could be a lack of support from the local school board branch. If this occurs, it will be necessary to ascertain the reasons for the lack of support and try to ameliorate the objections. It is difficult to determine before the first meeting why there might be a lack of support; however, the possibilities are that the local school branch might see the change initiative as reflecting poorly upon them in terms of their inability to equitize education among all schools in the area. It will be important to clearly communicate that this initiative is due to issues with the per student funding ratio and the difficulty of fundraising in poor rural areas, not due to any neglect from the local branch.

Two other potential issues with implementation are a possible shortage of volunteers for both committees and limited access to the central school board and NLTA members. A shortage of volunteers will be addressed by communicating to both staff and community members the need for increased resourcing in our schools, including the data for lower student achievement in rural schools versus more urban schools in Labrador. Additionally, using a data-based visual presentation, information will be available regarding a comparison of what is available to urban and rural students in terms of curriculum-based materials and activities. This communication should provide incentive for both staff members and community members to donate time and energy to forward this change initiative.

Accessing central school board and union members may prove somewhat difficult but using the guiding coalition members effectively can address this. A powerful initial presentation on the lack of resourcing within rural schools (combined with local school board branches' sanction) will provide evidence that the status quo needs to be changed and could incite the active support of people holding influential positions within our educational system. The guiding coalition may also use media to further the cause and put pressure upon the NLTA and School Board X to engage with the rural school committee.

Short, Medium and Long-Term Goals

Year one short term OIP goals to occur in the fall are: to gain the support of the local school branch; to form committees that have the potential to work based upon the right mix of individuals in each group; to organize next steps with regard to raising awareness about the lack of resourcing; and to plan various fundraisers and grant applications within the community to increase funding.

The medium-term goals with the rural school committee are to make an initial presentation to the board and union members and schedule follow up discussions on solutions to the problem. With the local fundraising initiative sector of this OIP medium-term goals are to implement and evaluate several fundraisers for effectiveness and positive response within the community. This would occur within the first year of the implementation plan.

Some long-term goals within a three-year timeframe include: a commitment from the central school board for increased resourcing support for rural schools; a possible change to the per-student funding formula; successful annual fundraisers with new ideas being brought forth on a continuous basis; and the building of a community culture in support of the local school. The ultimate long-term goal is a measure of social justice being achieved in the area of equitable resourcing between urban and rural schools.

Table 3.1

Short, Medium, and Long-Term Goals of the Change Plan.

Short Term Goals- In the fall of year one;	Medium Term Goals- By the end of year one;	Long Term Goals- Within a three-year timeline;
<ul style="list-style-type: none"> • to gain the support of the local school branch • to form committees that have the potential to work based upon the right mix of individuals in each group • to organize next steps with regard to raising awareness about the lack of resourcing • to plan various fundraisers and grant applications within 	<ul style="list-style-type: none"> • to make an initial presentation to the board and union members and schedule follow up discussions on solutions to the problem. • to implement and evaluate several fundraisers for effectiveness and positive response within the community. 	<ul style="list-style-type: none"> • a commitment from central NLESD for increased resourcing support for rural schools • a possible change to the per-student funding formula • successful annual fundraisers with new ideas being brought forth on a continuous basis • the building of a community culture in

<p>the community to increase funding.</p>		<p>support of the local school.</p> <ul style="list-style-type: none"> • a measure of social justice being achieved in the area of equitable resourcing between urban and rural schools.
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Limitations

Initiating this resourcing change confronts the current status quo and perhaps some assumptions about equitable resourcing and socially just schools. Implementation has been made more manageable by using two approaches to the resourcing issue so the success of the OIP doesn't rest wholly upon one initiative, and also by having only two diverse goals. However, there are limitations to the scope of this plan based upon several variables. As previously discussed, lack of local board support, insufficiency of volunteers, and the possibility of little central board and union assistance may affect the success of this OIP. In addition, the required level of staff time commitment is another limitation to the desired outcomes. Existing heavy workloads often result in undue hardship for school staff and adding the burden of responsibility for another school committee, and increased fundraising initiatives will be a difficulty. Nevertheless, in the interest of working toward rectifying the marginalizing of oppressed groups through the education system, this change will be implemented to improve the life chances for rural children. This will occur while taking into consideration contextual factors and following a well researched change model to strengthen the possibility of success.

Monitoring and Evaluation

Part of being an adaptive leader is not knowing the solutions beforehand. Flexibility and being able to lead within the disequilibrium are key tenets of this type of leadership, as the reality

is that distress is a part of the adaptive undertaking. In order to evaluate this change process adaptive leaders must *observe, interpret and intervene* (Heifetz et al., 2009) and these interventions can only be determined during the change process. There is no standard set of reactions to guide constituents through the tough realities of change. Therefore, the evaluation of this change is planned, but there is flexibility to veer from the plan depending upon the study and interpretation of stakeholder reactions.

The effectiveness of this OIP will be monitored and evaluated through formal and informal methods or as Cawsey et al. (2016) suggest for change assessment leaders, hard data and soft data. Formal assessment or hard data will be measured through numerical student achievement scores and through staff survey responses. Though student achievement is affected by a multitude of factors, such as poverty and race as previously discussed (p. 7), it is beyond the scope of this paper to determine student poverty levels and ethnic differences and how they affect achievement levels in this community. Student achievement levels are being measured as one indicator that this change might have been successful as the student population does not tend to fluctuate from year to year. Instead, the students enrolled remain stable having the same students from year to year for ten years or longer, therefore the poverty levels and ethnicities of the students at these rural schools don't often change. This makes student achievement levels a good indicator of success if most other contributing factors have remained the same.

The first analysis will be facilitated by gathering student achievement data before and after year one of the increased resourcing initiative. This will be completed by the change leader collecting data from the local school to compare formative and summative achievement levels. Discussions will follow with other participating schools to gauge opinions on increased resourcing having an effect on achievement levels in their own particular context. Individual

schools will be better able to decide if student achievement levels have been affected by increased resourcing or other factors, such as staffing, community issues, pervasive student needs etc. The second formal measurement will occur by assessing the workload levels of rural school staff as well as their opinions on the increased resourcing's effect on their ability to achieve the school board vision. This will be accomplished through the distribution of surveys before, during and after the first year.

Informal assessment or soft data on the effectiveness of this OIP will be collected through staff at individual schools by the evaluating available resources in the school including tangible items and accessible funds for curriculum-based activities. In addition, staff discussions will result in a list of what resources are needed immediately, as soon as possible, or eventually as budgets allow. These discussions will be used to continuously assess resourcing needs throughout the change process. Furthermore, informal assessment will occur through the monitoring of individual fundraising groups for successful collaboration and satisfaction concerning stakeholder roles within each committee. This will be achieved by observations and various communication methods. In using a combination of both quantitative and qualitative data to evaluate this change process a view of the effectiveness of the initiative, and where it is most and least beneficial, will be available. The quantitative data being the student achievement levels, and the qualitative data being the staff opinions on workload and ability to reach the school board vision.

While it is difficult to determine the ideal amount of time required for this change plan, one year will provide enough information to determine if the change can proceed further. Three years is an optimistic tentative schedule of implementation and assessment depending on the results of year one. Contingent upon assessment data and feedback, the plan may have to be

altered in length or scope. However, as the change process is not limited to three years, one hopes that the OIP will spur improvements which continue long past the suggested implementation timeline.

Throughout this OIP, critical theory and adaptive leadership influence all aspects of the change process. Adaptive leadership is about mobilizing people to face challenges and focuses on teamwork-based solutions to change the status quo (Heifetz et al., 2009). The assessment of this change process analyzes both the functional capacity of teams as well as the perceptions of team members. This is very important in adaptive leadership as a key element is involvement of others, and the distribution of responsibilities through independent judgement of stakeholders. Evaluation of individual levels of comfort with the change process will enable forwarding of the change as adaptive leadership is based upon diversity, and an enthusiastic group of stakeholders is a necessity. This assessment will potentially lead to cyclical planning and implementation to increase resourcing, and ultimately raise student achievement.

Aligned with Kotter's (2012) last two steps (consolidating change and anchoring new approaches in the culture) and the study and act sections of the PDSA cycle, along with an adaptive leadership process of observing, interpreting and intervening (Heifetz, 2009) changes will be monitored and tracked, and adjustments will be made if necessary. For example, some adjustments might consist of obtaining different or more comprehensive information for the rural school committee to present to the NLTA or the central school board. Possible changes in fundraising group structure may be required, or changes to the fundraisers themselves. Additionally, the continued assessment of resources within the school will allow for accumulation of what is needed, and determination of what is lacking. A variety of methods for assessment need to be used before, during and after this change process in order to determine the

effectiveness on multiple levels and to make modifications where needed during the implementation. Monitoring the change will support new initiatives within the change process while simultaneously increasing resourcing in rural schools, thereby potentially obtaining more social justice for children disadvantaged by rural realities.

There are two approaches in the implementation of this OIP, raising awareness and increasing individual school resources. As each organization's context is unique, three diverse assessment tools will be used in order to determine if the change processes are proceeding effectively within each chosen school and the school designations as a whole. All of the following assessment activities align with the study and act sections of the PDSA cycle, Kotter's (2012) two final steps in his change model (consolidation and anchoring new approaches within the culture) in conjunction with the adaptive change process. Both Kotter's steps and the study and act sections of the PDSA are dependant upon iteration (Pietrzak & Paliszkiewicz, 2105) and based upon opportunities for cyclical work and renewal during implementation. This also mirrors the adaptive leadership process of observation, interpretation and intervention (Heifetz, 2009). It is expected that this change process will continue to evolve over time based upon study followed by act and if effective on to consolidation and changes within the culture. The following graphic highlights the importance of the iterative process.

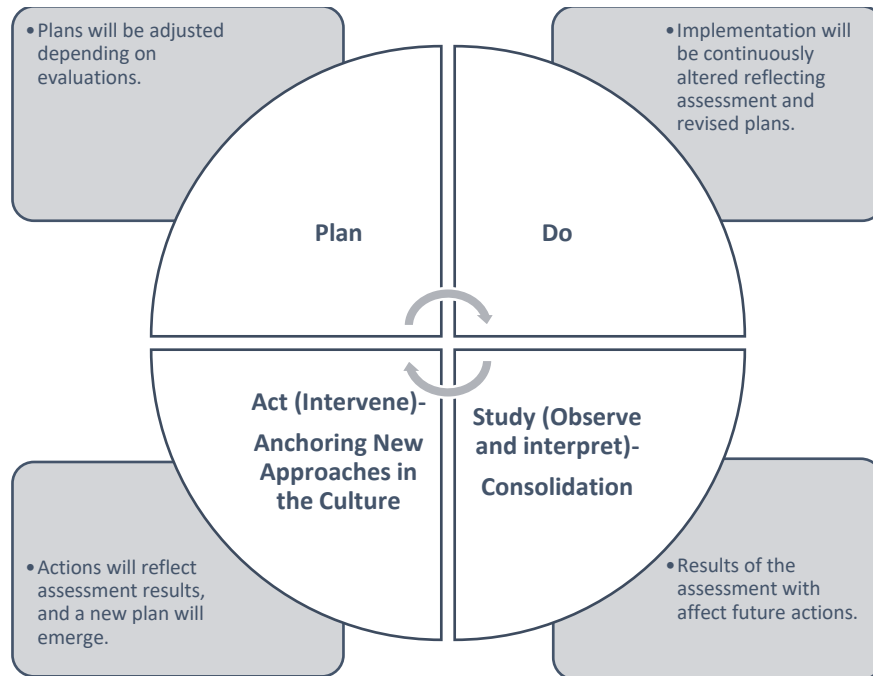


Figure 3.1. Integration of the PDSA cycle, Kotter's (2012) eight step change model (2016), and the adaptive leadership process (Heifetz et al., 2009).

Monitoring Achievement

Assessment 1. Student achievement will be compiled through the collection of individual school results amalgamated to show student achievement levels. This will be completed before the change process has begun and at the end of the first year, with the possibility of assessment at the end of each subsequent year if the change proceeds successfully. This will be followed by inter-school discussions on the achievement levels before and after the change implementation. The Board of Education provides yearly achievement levels for individual schools, which may give insight into the potential causality between increased resourcing and increased achievement after change implementation and assessment. The discussion between the ten targeted schools may provide a clearer view of achievement levels due to the small enrollments in some rural areas where achievement levels might be contributed to other factors than resourcing. The larger the group being assessed the more suggestive the data will be of a possible link between

resourcing and achievement. This data may indicate that increased resourcing has had an effect on student achievement and by what margin.

Depending on local fundraising support funding amounts will differ between schools, therefore we must be cognizant of the varying levels of resources and their associated effects on student achievement. In addition, there are other factors that might affect achievement levels; however, we can hypothesize that any amount of increased resourcing will potentially generate higher levels of student achievement.

As the PDSA cycle proposes the study of the change should be based upon measurable outcomes agreed upon before the start of the implementation process, and before and after assessments to determine the initiative's impact, clearly this assessment is in line with the PDSA directives. Each assessment will provide information on what to do next, as the student achievement figures will determine a significant and the most important portion of the effectiveness of the change. These assessments will also provide important information to the school, as they will be indicative of the importance of resourcing if the achievement levels increase and it is determined that higher resourcing is a major factor. If the change process is successful, and the assumption that increased resources will achieve increased student achievement is proved through the assessment data, this will be a step forward in Kotter's (2012) consolidation and anchoring new approaches in the culture components of the change model. If the data shows increased achievement after any of the assessments, it will present the critical moment to maintain equilibrium and continue to lead the change process forward. The shared values and group behaviours of a school and community culture may be changed as the new fundraising processes are shown to be potentially successful through the assessment of student

achievement data. These new behaviours and approaches will be anchored into the culture if the process data demonstrates initial predictions.

Monitoring Staff Perceptions

The second assessment studies staff perceptions of the implemented change. This will be determined by using surveys for constituents to express how the change initiative has positively, or negatively affected their particular situation.

Assessment 2. Two separate surveys will be distributed to staff for assessment purposes. The first set of surveys will focus on members of the rural school committee and will evaluate committee member opinions of the potential and demonstrated effectiveness of the change process. The vision for this particular committee includes raising awareness within the NLTA and School Board X on the issue of rural school resourcing. This survey will be sent out before the initiative and at the end of the first year, with the possibility of survey deployment at the end of each subsequent year. These surveys will be sent and collected by the change leader.

The second set of surveys will measure staff perceptions at individual schools of their workloads, and their perception of ability to meet the vision of the board with current levels of resourcing at each period of survey completion. This is intended to measure improved satisfaction/lowered stress levels of staff due to several potential factors. One of these factors is increased student achievement and greater opportunity for curriculum-based activities within and outside of the school. The alleviation of workload and decreased need for the expenditure of personal income to compensate for lack of school funds may be another consequence of the change. Also, an expanded belief in the possibility of attaining the school board vision, and potential intensification of social justice within rural communities might be an outcome of the

change. Efforts to collect data will involve all staff members even if they are not actively involved in school fundraising initiatives as increased resourcing will presumably affect all employees. The measurable hypothesized outcomes are alleviation of staff workload and subjective opinions on the possibility of reaching the school board vision through increased resourcing. The surveys will aid in prospective decisions on how to proceed with the initiative depending on survey outcomes after each evaluation of staff members. If the surveys show a decrease in workload and an increase in staff confidence in reaching the school board vision, then consolidation and anchoring of new approaches can be implemented through change leader push and desired behaviour reward systems, as suggested by Kotter (2012). If the data does not reveal the predicted outcomes of the change process in this area, adjustment and re-evaluation of the initiative may be necessary.

Informal Communication

Assessment 3. Continuous informal discussions, face to face or through using technology, with staff on the positive or negative effects of the initiative will forward the change process and allow for any necessary adjustments. This will include communication with the rural committee for suggestions to improve advancement of the goal of raising awareness, and communication with staff and community members on the fundraising teams to gather input and information.

Change leaders will closely observe the development of the fundraising groups and seek out evidence of teamwork, positive attitudes and team effectiveness. This informal assessment will allow for any necessary changes to the groups or their individual initiatives. This will also include assessment of volunteer grant writing, and the number of grants conferred upon schools. This particular assessment activity is imperative for the change process, as the change is

stakeholder reliant for success. Involved constituents will need to be handled delicately because dissatisfaction with the process can derail the initiative. Negotiation, coercion and surreptitious manipulation could be employed if the informal assessment determines that fundraising participants are resisting the change process, which is also reflective of the intervention sections of the adaptive leadership process. Although this examination is informal gathering of soft data, it is a very important component of the change process' potential effectiveness.

Lastly, discussions and decision making with staff will take place regarding resourcing and categorizing levels of need. Staff will monitor resources on an ongoing basis to assess what will need to be continuously purchased, such as art supplies; annually purchased, such as paper and books; or intermittent purchases such as games and manipulatives. This assessment will be in conjunction with an evaluation of the amount of funds needed in the school account, both the very basic amount and the ideal amount. These funds will be used to facilitate out of school curriculum-based activities, in-school celebrations, and to enable short-term wins (Kotter, 2012) through the purchase of small thank-you items for staff and volunteers along with celebrations for successes (see Appendix B).

Both the formal and informal assessment of this change initiative needs to contain flexibility as evaluations may require responses to stakeholders, and/or subsequent modifications of the change process. The change plan can be altered if necessary, based upon the collected data during the phases of the implementation.

In part the assessment and evaluation of this plan will hinge on information received from communication with all stakeholders. This reciprocal communication will inform the change leader of the needs of various committees and individuals, and next steps in the implementation plan. The following sections will illustrate the communication process in detail.

Plan to Communicate the Need for Change and the Change Process

Communicating the need for change to various stakeholders is the first step in beginning this change process. According to the 2010 study by Neufeld, Wan and Fang, distance and professional isolation does not necessarily indicate a barrier to successful leadership or communication. Therefore, communication effected through technology should be no less productive than proximal communication. This need for change will be forwarded by building awareness of the lack of resources in many rural schools, particularly as compared to the more urban schools in Labrador. As discussed in various points through chapters one and two, often stakeholders who are not intimately associated with the day to day operations in the school are not aware of the resourcing issue.

Communication will first consist of raising awareness and communicating/creating the vision for change with local and regional school staff and the local school board. Having local staff on-board with the change initiative is a key piece which would ensure smoother implementation of successive steps. This will be followed by raising awareness and communicating the vision for change amongst three groups, the NLTA and School Board X, and the local community stakeholders.

Initial staff communication will be achieved mainly in the form of in-school and online meetings (between towns) and informal discussions. Following that, online collaborations will be requested from the central branch of the school board and NLTA through phone calls and email and facilitated through Skype. Communication with the local community will then follow a trajectory beginning with committee formation, through fundraising events, to small celebrations, combined with whole community inclusion at specific points of the change process.

Communication with the townspeople will consist of newsletters, flyers, town website announcements, informal discussions and scheduled meetings at the town hall and/or school.

All communication will be performed with the intent of building positive and supportive relationships between all stakeholders in the hopes that this will forward the change process.

Building Awareness of the Need for Change

Communication is a key element in this change implementation. It will be necessary to clearly present why this change is needed, and to push forward the change.

School staff and local school board. In raising awareness of this issue, communication must begin with staff and the local boards assistant director to initiate the formation of the various coalitions to advance the change, ideally with support from the local school board branch. All rural staff members are aware of the lack of resourcing within their schools as it is a daily struggle. They are also aware of the lower achievement levels of the rural school students, though the causes of this lower achievement may stem from a multitude of factors. The hypothesis of this OIP is that one of the potential reasons for lower student achievement is the lack of resourcing available to students. Advancing adaptive and participative leadership will be a key goal of communication to staff and the local school board. This section of the communication plan lays the foundation for future staff involvement within the dual committee approaches of this change process.

The communication regarding the inception of the rural school committee will occur initially through advertisements in a monthly newsletter that is distributed to all schools, and emails being sent to all ten targeted rural schools in Labrador. Once interest is expressed an

initial online meeting will be facilitated through Skype to present the change initiative and begin the formation of the guiding coalition.

Staff participation in the local fundraising group initiative will be promoted through email and in-school meetings scheduled by the change leaders based upon staff availability.

Central school board and union. The second communication approach will consist of raising awareness within the NLTA and the central board through the work of the rural school committee. Requests for representatives from these organizations will be made through emails and phone calls, and a scheduled preliminary meeting. During this initial online meeting a presentation will provide representatives with several critical pieces of information. This information will consist of data distributed by the NL Board of Education on student achievement differences between urban and rural schools, along with the theory that increased resourcing will potentially raise student achievement.

This will be followed by a concrete exhibition of the differences in the level of resources available to rural students versus urban students through pictures and compiled numbers of per student resources in schools, plus the level of funds available for curricular based activities. Also, teacher provided levels of personal income used to supply the school with resources will be shared. Access to this information will be gathered through close personal relationships among staff in Labrador, and a culture of collaboration that currently exists between most schools and staff. In addition, the current policy of per student funding will be addressed along with the poverty levels of rural communities preventing the potential of fundraising that urban schools have. This will be framed from a social justice perspective in keeping with the goals of this OIP. Further communication will consist of online meetings and face to face meetings if the change

initiative is favourably accepted and a commitment to change is received from these organizations.

Anticipated questions from these associations may consist of what the possible funding opportunities are, including prospective fundraising and grant application within the communities. Information will then be given on the lack of staff to support the needed levels of fundraising, along with the new community-based fundraising change initiative. Grants applied for and received will also be presented, despite the heavy use of personal time to complete applications, purchase goods and fulfill grant following up procedures. Emphasis here will be placed upon grants being rejected or decreased from contributing organizations due to low rural enrollment numbers, and the apparent pervasive belief that small student populations need very little funding for resources. Further inquiries may include questions around why the sudden push for increased resourcing, or why the status quo has worked up to the present time and is suddenly fallible. The response to this will be that curriculum expectations have increased with new implementations over the past several years such as the onset of full day kindergarten, new hands-on science implementation, and play-based learning for up to grade three. In addition, the complex responsibilities of staff have increased with new report card and attendance systems, school improvement plans, special needs programming for students, higher levels of accountability in terms of paper work and record keeping, safe and caring schools' initiatives, and many other responsibilities that were not previously so intensive. Although these changes are important, they have made demands upon staff time that naturally takes away from fundraising possibilities. Along with in-school demands, a change in the status quo will be conveyed as necessary due to changes in rural community structures with outmigration, unemployment, and a

larger senior citizen base than previous seen. This has led to a lack of community support for the local school in some areas.

Community. The third communication approach in this change will be to raise awareness within each community about the lack of resourcing in the local school. It is the assumption of this OIP that many community members would not be aware of the lack of resourcing in rural schools. Resourcing needs are not often communicated to the community due to the level of poverty present and staff not wanting to place additional financial strain on families. This lack of awareness in some rural communities has had a detrimental effect on local schools with very little community-initiated fundraising being attempted. The plan to communicate the need for change in this context will be to hold a preliminary meeting with the community. This will be advertised with flyers displayed throughout the town and placed in individual mailboxes, town website announcements, and word of mouth. The information given out at this event will consist of the per student funding formula and lack of fundraising leading to the local school being under resourced. To illustrate the problem, a slideshow will be presented showing the levels of resources available in more urban schools and lists of the activities available to these schools due to increased resourcing levels, which are unavailable to most rural students. It will be made clear that this is caused by the per student funding formula and the difficulty in fundraising in smaller communities. In addition, student achievement levels between urban and rural schools in Labrador will be shown, with an explanation of the multitude of factors that might account for this, including the belief that resourcing is a contributing factor. This communication session will be followed by a question and answer period. The main anticipated question is why the local community was not made aware of this before, and the answer will be that staff did not want to place additional financial burden upon the families;

however, the increasing requirements of the curriculum have now exceeded the possibility of staff meeting the demands without community intervention. The community will also be presented with totals of staff money spent on the school in the previous year and lists of what the money was spent on. Stakeholders will also be advised that this change process includes lobbying the central board and NLTA for support although community involvement is still a necessity to forward change.

Communication will conceivably be supported by the local branch of the school board. The assistant director will be included in all change plan initiatives from the beginning, and the plan will be communicated to the townspeople as a collaborative effort between local communities and the local and central board and union. This presentation is not a means to position the rural schools against the school board, but rather an illumination of the resourcing issue. With so many fiscal demands placed upon School Board X it is expected that some areas of education will experience scarcity, and the community will be entreated for help rather than for political rallying against departments or groups. This meeting will be carefully orchestrated to position the school and the board as a team hoping to recruit the community in order to create positive change for the students.

Connecting to the Plan to Communicate During and After the Change

Staff

Continued communication with staff on ideas and issues surrounding the committees will occur through email, phone calls, texts, in-school and online meetings, and informal face to face discussions. It will be necessary to meet frequently to collaborate on ideas and problem solve possible challenges within each of the various coalitions. Agendas will be set as topics arise, and

a continued effort will be made to build positive relationships and an engaged school community. Support and encouragement will be provided by the change leader, along with small gifts, given both locally and sent to rural committee members in other locales. Celebrations within individual communities will be planned to continue to motivate individual effort and stress appreciation.

Local and Central School Board and Union

Regular communication with the local school board branch will continue throughout the change process. The assistant director will be continually updated, and advice sought. This support could be instrumental in change process effectiveness as essentially the local branch is the middle man between schools and the central board. If the local branch endorses this change initiative it will be a step toward OIP success, as there are limits to the influence some rural school leaders have with central board members who there are general low levels of contact with.

Communication with the NLTA and School Board X will continue through the change process with regular meetings online. The rural school committee will provide these groups with anticipated resourcing changes within the school and the outcomes of these changes (possible increased achievement) during and at the end of the first year. If these groups are not predisposed to supporting the change, the data will be provided to the representatives irrespective of their ability to immediately contribute to solutions on the resourcing issue. Improvement in student achievement at the end of the first year may stimulate interest in resourcing efforts within these two groups. This will potentially culminate at the end of the three-year timeline with a comparison of student achievement rates before and after the entire change process. If the achievement rates improve as this OIP predicts, the hope is that these organizations will begin to support (if this is not already the case) or continue to support resourcing in rural schools.

Community

The third strategy consists of communicating with the local community; however, these communications will consist of working with the fundraising group members first and on a more frequent basis, followed by the community as a whole.

Fundraising groups. After the initial meeting to raise awareness of the issue, group communication will by necessity consist of recurring meetings with the various fundraising committees to organize and run events. These events will be held in year one with a focus on literacy, with the goal of buying literacy resources to improve student reading and writing achievement scores. Many rural places in Labrador do not have libraries either within the school or the community, so the first item would be to build classroom/school libraries. This would be followed by the purchase of items to forward the teaching and learning of literacy within these schools depending on the needs of each context. Some schools might need to focus on the purchasing of books, while others might need manipulatives such as magnetic letters or small whiteboards, still others might need to create an inviting reading area to promote interest and excitement about books. Communication with the townspeople will be achieved through face to face meetings, emails, phone calls and texts. This will be followed by fundraising events, debriefing after the events to discuss what was effective, and decisions on how to proceed. Semi-annual meetings will also be held to illustrate the positive outcomes of the initiative including data on amounts of money raised, and resources obtained for the school, combined with small celebrations to give thanks.

Community. The entire community will be asked to be present at the initial meeting to raise awareness and encourage participation in the fundraising for the school. Informal discussions achieved through periodic encounters in various local areas will also be an effective

means of providing information to individuals. At the end of year one a town hall meeting will be held for the entire community illuminating the literacy fundraising successes, including amounts of money raised, resources purchased, increased student achievement levels and to thank the community for their support with a small celebration. This will be followed by an end of year newsletter with pictures reinforcing the community effort and illustrating the increased resourcing and how it benefits the students. Continued building of positive community relationships and the creation of a community culture around school fundraising will be achieved through these varied communications between staff and community members (see Appendix C).

Communication is a critical component of this change process. It is the first step in raising awareness using adaptive leadership to mobilize groups of people to take action and in building the guiding coalitions. It becomes no less important in the implementation and assessment stages of this OIP, as the entire change process is built upon effective communication between a myriad of groups. This OIP will succeed or fail based upon the ability of the change process leader, committee leaders, and all other stakeholders to both convey and understand the complexities of this problem and the various complications that may emerge from the change process.

Next Steps

If the change process is successful in year one, the next step would be the consideration of year two. Depending upon the level of resourcing reached in year one, the second year might see a continued effort to increase literacy resources within the school or that focus might be shifted onto resourcing in another area such as science or math. Well received fundraisers will continue to be implemented into year two, with new ideas attempted to determine community opinion and participation.

Future Considerations

Three key issues emerge when considering the future of this change process. First, engaging staff in continual participation in the rural school committee and various fundraising groups remains a constant

. Second, preliminary and continued support from the local and the central board , and the NLTA for increased rural school resourcing and examination of the existing policy of per student funding. Lastly, the creation of a new community culture based upon school fundraising and a commitment to support the local school. These three components of the change process will potentially create a bank of resources, and funding for resourcing, that could result in possibly improving future equity between urban and rural schools in Labrador. All the future considerations depend upon adaptive and participative leadership, combined with creative leadership, from various stakeholders. Initial implementation would occur through the change process leader in the fall of year one but be effectively continued by all involved constituents for the greater good of the students and staff.

The rural school committee could potentially continue to function after the first year, and perhaps even after the suggested potential three-year timeline if the per student funding policy was not changed and no alternate funding solutions were presented. However, a loss of momentum after three years of no board or union-based change would be expected. The future of the committee would be more certain if the funding was ultimately changed for rural schools, as other rural school issues could be addressed through this already formed coalition. The continuation of this group will depend upon the success of this increased resourcing initiative, and possibly on future rural educational endeavors.

The subsequent years after the first year of the implementation will be important to the fundraising groups as well. Maintaining momentum and a positive environment along with successful fundraising events and celebrations will further promote a culture of support for the school, and community spirit built upon good relationships and mutual goals. It is the hope of this OIP that fundraising will continue as a community initiative long after the implementation process is over.

Although this OIP has a tentative three-year timeline, though the focus is on the first year of implementation which will determine the effectiveness of the change process, and if the process should proceed as planned, needs adjustment, or another plan should be put into place. This plan is ambitious in its nature of attempting to affect change with two approaches, though this also insulates the change against complete failure with it's alternate, or complimentary, methods for solving the resourcing issue. If the initial year is a success and the subsequent years go forward as anticipated, then consideration of beyond the three-year timeline is needed. It is one of the goals of this OIP that the NLTA and School Board X will have joined forces in support of the rural school resourcing problem and provided some portion of a solution. Another goal is that the local committees have collaboratively created a culture of community fundraising that continues far beyond the scope of this change process. However, the nature of the changing rural areas in Labrador must be considered. As the populations of rural communities continue to decrease with the outmigration of working age people for economic and social reasons, the future of rural schools is unknown. Rural community members often now consist of retired individuals and those on social assistance, leaving the local school at a disadvantage due to community poverty levels, and this trend is expected to continue. This will necessitate an

alternate plan for funding in the rural schools that remain, either through increased government sponsorship or outside of community fundraising.

The possibility also exists that the NLTA and School Board X will not support this initiative, and that the local community will be unable to sustain continued fundraising for the school. If this occurs communication with the media may be necessary to highlight the pressing need in rural schools for increased resourcing, particularly as compared to what is available in urban schools in Labrador. In a successful change process, the media could be used to communicate the favourable outcomes of the initiative and thereby bolster support for the change outside of the individual communities. Perhaps even incite larger provincial businesses to aid struggling rural schools. However, in the case of change failure the media could be used in an awareness campaign to communicate the situation occurring in these schools and illustrate that support is needed. This would be a last resort as it could compromise relationships but may be a necessary step to increase social justice for rural schools if all else fails.

Conclusion

As a leader in a rural school, it is incumbent upon me to ensure that the students in these areas have a strong advocate. The voices of the few are often drowned out by the voices of the many, but rural school leaders must find a way to illuminate the “geographical blindness” (Roberts & Green, 2013, p. 765) that shadows most policy affecting rural schools. Privilege and poverty affect educational equity more than is commonly known in what is viewed as a just and equitable public education system. Therefore, rural leaders are the crucial piece in making changes to ensure that the students with the most need receive at least some focused consideration. The conversation needs to be changed from what all schools need in general to increase student achievement, to what is *specifically* needed in contextually different schools to

make positive advancements for all students contained therein, without ignoring the ramifications of their community environments.

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Appendix A

School District Memorandum

To: School Administrators
From: N/A
Date: August 27, 2018
Subject: Instructional Allocation – 2018-19

This memo provides some important information relating to your school's allocation (general needs and copier expenses) and purchasing for the 2018-19 school year. Instructional allocations to schools are finalized and are in the process of being emailed to each school Principal. In the coming weeks, the 2018-19 budget will be uploaded into SDS and you will be able to see your allocation under Via Accounting.

ALLOCATION FORMULA

The formula for schools instructional materials was redesigned for 2014-15 based upon the formulas for the legacy boards as well as the following key methodologies:

1. A higher weighting is allocated to schools with lower enrollment, as economies of scale for certain items are present as a school’s enrollment increases.
2. A reduction in the number of adjustments and charges against the allocation, so that school administrators are better able to manage their spending throughout the year.
3. Overall funding for schools instructional materials was not to decrease from 2013-14 levels. Therefore, we will once again provide a budget adjustment to schools that fall short of their 2013-14 funding level, for allocation shortfalls not attributable to declining enrollment.

This allocation formula will remain in place for the 2018-19 school year. To provide a more accurate allocation and to accommodate configuration changes we are using the September 2018 projected enrollment instead of the prior year’s AGR.

Instructional allocations are provided based on the following formula:

<i>If your Sep 18 projected enrollment is between</i>		<i>and</i>	<i>Then your base allocation is</i>		<i>plus</i>	<i>For every student in addition to the first</i>
1	5		-	\$250		0
6	50		\$1,250	\$160		5
51	100		\$8,450	\$140		50
101	150		\$15,450	\$130		100
151	200		\$21,950	\$120		150
201	+		\$27,950	\$115		200

For example:

If your September 2018 projected enrollment is 147, your allocation would be: $\$15,450 + (47 \times \$130) = \$21,560$

If your September 2018 projected enrollment is 316, your allocation would be: $\$27,950 + (116 \times \$115) = \$41,290$

The base allocation, as shown in the table, is determined by adding all the incremental allocations up to a given range. So, each school with an enrollment over 201 (for example) will receive \$250 for the first 5 enrollments, then \$160 for the next 45 enrollments, then \$140 for the next 50 enrollments and so on.

INSTRUCTIONAL ALLOCATION EXPENDITURES

The instructional allocation is provided to schools to be used primarily for instructional supplies, materials and copying expenses. Where budget is available, a schools instructional allocation may be used for other items in support of student learning and achievement. The following expenditures fall under the intended use for this instructional allocation:

- Classroom supplies and teaching aids
- School and office supplies
- Library resources
- School instructional equipment (i.e. physical education/science lab/music)
- Information technology equipment and applications
- Photocopier lease payments and usage charges
- Photocopier paper
- Professional development opportunities for teachers (registration fees or travel) – may be cost shared
- Nutritional breaks for PD events (at reasonable discretion per attendee)
- Replacement furniture (student or office) at a reasonable percentage of allocation
- Medals and nominal awards to students at a reasonable percentage of allocation and for current year use only

The following expenditures do not fall within the intended use for this instructional allocation:

- Gifts for students, teachers or third parties
- Meals for students, teachers or third parties
- Staffroom food or coffee supplies
- Travel reimbursement for staff for non-PD related travel
- Graduation or prom expenses including decorations for these or similar events - Non-educational school promotional materials

Items that are being purchased to be re-sold or raffled (i.e. school clothing or ticket prizes) **OR** items which the school has or will receive the money (ie field trips) from a third party cannot be purchased under the school's instructional allocation.

ALLOCATION DATES

Your instructional allocation will be available for use in three (3) increments each year; July, December and February. For the 2018-19 school year, the dates are as follows:

<i>Increment</i>	<i>% available</i>	<i>Effective date</i>
1	50%	July 1, 2018
2	75%	December 1, 2018
3	100%	February 1, 2019

Exceptions are granted to accommodate shipping issues for certain schools in isolated areas, where a higher % of the allocation is available at the start of the school year. Please contact the Manager of Purchasing to identify any shipping issues you may have.

Please note that while the first budget increment is on July 1, 2018, orders can be entered in SDS any time after June 1, 2018 for delivery in time for school start up. Please indicate a delivery date when you anticipate staff available to receive the good.

PURCHASE ORDERS

All schools are expected to use **via Purchasing** to requisition the purchase of goods and to generate a District issued purchase order. Schools must follow all District purchasing policies and procedures.

ORDERING DEADLINES

The ordering deadlines for purchases from school instructional allocations are as follows:

- Out of province orders – April 19,2019
- In province orders – April 30, 2019

Schools may be permitted to order certain goods or services (e.g. paper for copiers, consumable items for certain programs) until May 30th each year to utilize any remaining budget allocation for that year. Any exceptions to ordering deadlines noted above must be approved by the Purchasing Department before the good or service is ordered.

REQUESTS FOR REIMBURSEMENTS

Schools may request a reimbursement of minor incidental expenses for goods and services not normally purchased through purchase order. These cannot include any item on a current standing offer with the District. ***Schools may submit two requests per year, one in the fall and one in the spring.*** The value of each request must not exceed \$250 and any individual items cannot exceed \$75. If schools submit requests in excess of these limits, they will be returned to the school and must be funded from school generated funds. Requests for reimbursements must contain a completed "Request for Funds" form authorized by the Principal, as well as individual receipts that indicate proof of payment. If payment was in the form of a school cheque, we require evidence that the cheque had cleared the school's bank account.

CARRY FORWARD

In accordance with standards issued by the Public Sector Accounting Board, any instructional allocation not spent by June 30, 2018 **cannot** be carried forward for use in a future year.

Any goods or services ordered must be received prior to June 30, 2019 in order for the funds to be drawn on the current year allocation. If an order placed before June 30 was received in September of the following year, this amount will be drawn on the budget of the following year, even if the school had allocation from the previous year remaining. As such, it is very important for schools to monitor their outstanding purchase orders, especially towards the end of the school year. Also, please note that vendors are requested to submit original invoices directly to accounts payable, if a school received an invoice for an item purchased through their instructional allocation, please send this to accounts payable as soon as possible.

If a school has exceeded their allocation in any given year, the school will be invoiced for the excess amount and is expected to pay this from school generated funds.

Task	Component	Who?	When?	Monitoring Tools	How?	Success Indicator	Resources
1	Student Achievement	Change Process Leader and principals of other rural schools.	Before the start of the change process, and at the end of years 1, and potentially years 2 and 3.	Student achievement reports.	Comparing of data by Change Process Leader. Discussion with other schools on achievement after increased resourcing.	Increased levels of student achievement.	Staff, time, technology for communication.
2A	Staff Surveys-Rural School Committee	Change process leader and Rural School Committee staff.	Before the change process begins, and at the end of year one, and potentially years two and three.	Surveys produced by change process leader and possibly other staff.	Surveys emailed to Rural School Committee members.	Successful communication with NLTA and NLESD. Improvement to rural school resourcing through board effort.	Working technology, possible funds for travel, staff expertise on software for presentation, time.
2B	Staff Surveys on increased fundraising initiatives within the communities .	Change process leader and all rural staff.	Before the change process begins, and at the end of year one, and potentially at the years two and three.	Surveys produced by change process leader and possibly other staff.	Survey emailed to all rural school staff in the ten monitored schools.	Increased level of resourcing obvious within the schools, Workload/ stress level decreased by the end of year one.	Working technology, time.
3	Discussions	All stakeholders	Before change process begins, and nonstop throughout the process.	Discussions, notes kept.	Planned meetings, class visits and impromptu discussions where available.	Equitable level of resourcing achieved in each classroom, and within the school as compared to urban schools.	Time

Appendix B

Assessment Plan for Change Initiative

Appendix C

Change Communication Plan

	Stakeholders	Communications	Actions	Expectations
Strategy 1A	Rural Education Staff (Rural School Committee Formation)	-Emails and advertisements for rural school resourcing committee. -Preliminary online meeting to provide data and create a sense of urgency, along with committee formation. -Subsequent meetings for organization of plans for implementation.	-Place ads and emails, plus follow-up. -Form committee and develop the vision. -Use adaptive and participative leadership to forward vision.	-Creation of a rural school committee for the purposes of raising awareness of the resourcing issues. -Distribute leadership to organize components of the initiative. -Implement. -Celebrate successes.
Strategy 1B	Rural Education Staff (Community Fundraising Initiative)	-Initial meeting to communicate the vision, use participative leadership to assign leaders to head up community fundraising	-Schedule staff meeting for communication purposes and to begin initial implementation steps.	-Create awareness of fundraising initiative within the community. -Distribute leadership to organize components of the change. -Begin initial implementation steps.
Strategy 2	NLTA and local and central NLESD	-Emails, phone calls. -Online meeting for initial presentation. -Follow up meetings, possibly online or face to face.	-Request formal meeting with representatives. -Presentation of data. -Request follow up meetings for solutions-based ideas and collaboration.	-Inclusion of assistant director in change plan. -Raise awareness within the NLTA and NLESD of resourcing issues. -NLESD and NLTA commitment to solutions-based collaboration.
Strategy 3	Community	-Initial meeting to present data on resourcing issues and present the critical	-Town meeting request sent through post, website, flyers and outlining reasons.	-Raise awareness within the community or resourcing issues.

		<p>perspective on under resourced rural schools, in order to communicate the change vision.</p> <ul style="list-style-type: none"> -Subsequent meetings for group vision creation, committee formation and trouble shooting. -Flyers distributed, online advertisements, and word of mouth for events. -Later meetings with whole community to present the effects of the fundraising. -Community newsletters to intermittently present the new resources, recognize stakeholders, show accounts of funds raised and what they were used for. 	<ul style="list-style-type: none"> -Organization of initial presentation. -Subsequent meetings scheduled. -Celebrate successes with fundraising groups semi-annually or more frequently according to success rates. -Flyers and newsletters produced for communication and advertising purposes. -End of year meeting advertised to present resourcing successes. 	<ul style="list-style-type: none"> -Form functional committees for fundraising. -Develop community spirit and positive relationships. -Create a new community culture based upon fundraising events for the school.
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