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Building Bridges to Wellbeing: Using Trauma-Informed, Socially Just Practices to Foster Educator Capacity and Resilience to Promote Student Wellbeing

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Abstract

In contemporary North American society, youth mental health incidents of depression, anxiety, and loneliness, to name but a few, have worsened over time and pose significant challenges for educators to understand and address. Emergent demands for responsive school policies, procedures, and practices increasingly require educational leaders to be informed by complementary disciplines; i.e., psychology and health care, to more effectively integrate best practices into the field. As an example, trauma-informed principles and strategies are being used to conceptualize and account for negative mental health outcomes and conjointly guide planning for more effective responses in schools. In this way, understanding the impacts of trauma on youth, and in particular, youth from marginalized backgrounds and identities, supports an integrated approach to student social-emotional development. To take action, this Dissertation-in-Practice (DiP) explores the creation of a professional learning community (PLC) guided by a trauma-informed, social justice perspective to develop faculty capacity to support youth social-emotional development. This paper also provides for leadership agency and change through exploring guidance counsellor expertise and relational positionality to foster positive relationships within schools. Additionally, authentic and distributed leadership is developed as a focal point to contextualize change leadership and local conditions. This overall approach to change anchors anticipated outcomes such as increased school-wide collaborative processes and empowerment, strengthened relational supports, and trauma-informed policies and practices, and further contributes to the institutionalization and sustainability of desired outcomes.

Keywords: trauma, social justice, professional learning communities, authentic leadership, distributed leadership, counselling

Executive Summary

Modern schooling represents promise for promoting positive student wellbeing. Situated within communities and multiple stakeholders, schools represent an important site for youth to access treatment and services, in addition to the provision of universal interventions to promote overall student wellbeing. Rather than a “one-size-fits-all” approach, models of youth mental health provision should be comprehensive and tiered to address the differentiated needs of stakeholders. One such intervention that has garnered increased researcher and academic interest is the integration of trauma-informed or trauma-sensitive practices into K-12 schooling that have been demonstrated to produce positive outcomes related to ameliorating youth mental health and wellbeing (Atallah et al., 2023; Berger & Martin, 2021).

Given these findings, an ethical imperative for creating greater awareness and efficacy in supporting youth mental health exists with a corresponding necessity to increase focus on educational administration and leadership within the school system. Guidance counsellors in particular are well placed to play a positive leadership role to effect change (Allan & Moffat, 2016; DeKruyf et al., 2013; Janson et al., 2009); but guidance counsellor leadership by itself is not enough. A holistic, participatory approach, involving all members of the school community, is essential to create requisite cultural buy-in and effectively strengthen desired relational and normative changes that can sustainably promote improved student mental health and wellbeing.

This DiP explores possibilities to address the emergent youth mental health crisis within the local context of Bitter Greens Academy (BGA, a pseudonym) a medium-sized school located in the suburbs of a large Canadian city. Chapter 1 situates and problematizes the Problem of Practice (PoP) within relevant local contexts and examines my own leadership position, positionality, and leadership-focused vision for influencing positive change at BGA. Further, a trauma-informed perspective is presented as an integrating framework to address the PoP and assess suitability of potential change strategies while also discussing change priorities important to the organization.

Having presented an overall context and epistemological foundation for understanding the PoP and possibilities for leadership in Chapter 1, Chapter 2 develops a specific leadership stance, comprising elements from authentic and distributed perspectives, to guide change. Further to developing change leadership mechanisms, the chapter presents an integrated organizational change framework composed of trauma-informed organizational principles developed by the Substance Abuse and Mental Health Services Administration (SAMHSA, 2014) and Lopez & Jean-Marie's (2021) anti-oppressive leadership development stages; both models are integrated within Kurt Lewin's Change-As-Three-Steps (CATS) model (1947), creating a comprehensive and aligned organizational change framework. Analysis of organizational change readiness, relevant ethical paradigms, and strategic options are then conducted, with conclusions drawn that the creation of a professional learning community (PLC) represents the most suitable option to address the PoP at BGA.

Chapter 3 outlines an implementation plan inclusive of communication and evaluation considerations that is focused on capturing specific roles and responsibilities, goals, strategies, and key deliverables at each step of the change process. The chapter also identifies change priorities such as strategic alignment, stakeholder engagement, organizational learning, and motivation that are viewed as central to the process to ensure implementation fidelity and validity. The chapter also explicates the role of knowledge co-production and mobilization (KMb) within the change effort and presents a modified knowledge mobilization framework (Ward, 2017) to document important group learning and participatory processes guiding the change. With regard to monitoring and evaluation, Hall & Hord's (2020) concerns-based adoption model (CBAM) was chosen to measure implementation effectiveness with targeted assessments of participant stages of concern (SoC), levels of use (LoU), and innovation configuration (IC).

Bridging literatures of implementation science, organizational studies, health care, and educational leadership, this DiP supports an integrated, consilient stance around knowledge production and mobilization and presents an integrated, practical model for implementation of

trauma-informed, socially just practices in education. Although situated within particular circumstances and the micro-level context of BGA, the present framework is generalizable and expands upon current organizational change literature and applications of trauma-informed principles to organizational change, and as a result, contributes to wider knowledge around conceptual frameworks that can facilitate implementation of organizational reforms toward equitable and trauma-sensitive outcomes.

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Lastly, I would like to acknowledge and include here a personalized version of BGA's Land Acknowledgement in honour of Indigenous peoples that lived and currently live on the land where BGA is located, with sincere thanks and hope that this DiP and all other work produced by BGA can further the efforts of decolonization and socially just practices.

This Dissertation-in-Practice was produced on the traditional territory of the Anishinaabe, Haudenosaunee, Huron-Wendat, Métis, and Mississaugas of the Credit First Nation, all of whom have called this land home from time immemorial. More specifically, I acknowledge the seven Williams Treaties First Nations for their care and stewardship of these lands. These include the Chippewas of Beausoleil Island, Georgina Island, which is closest to us, and Rama, as well as the Mississaugas of Alderville, Curve Lake, Hiawatha, and Scugog Island. May this effort and all other school endeavours honour the Indigenous peoples of these lands, their lifeways, and their cultures and languages.

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Acronyms

AL	(Authentic Leadership)
ADL	(Authentic Distributed Leadership)
CI	(Critical-Interpretivism)
BGA	(Bitter Greens Academy)
CAIS	(Canadian Accredited Independent Schools)
CBAM	(Concerns-Based Adoption Model)
CCPA	(Canadian Counselling and Psychotherapy Association)
CRPO	(College of Registered Psychotherapists of Ontario)
CRSL	(Culturally-Responsive School Leadership)
CRT	(Critical Race Theory)
DIP	(Dissertation-In-Practice)
DL	(Distributed Leadership)
IBLP	(Inquiry-Based Learning Philosophy)
OCT	(Ontario College of Teachers)
PLC	(Professional Learning Community)
PPI	(Positive Psychological Intervention)
MTSS	(Multi-Tiered System of Supports)
SAMHSA	(Substance Abuse and Mental Health Services Administration)
SBMH	(School-Based Mental Health)
2SLGBTQ+	(Two Spirit Lesbian Gay Bi-Sexual Transgender Queer Plus)
SMHO	(School Mental Health Ontario)
TAG	(Teacher-Advisor Program)
UPP	(University Preparation Program)

Definitions

Authentic Leadership: A holistic, multi-faceted leadership perspective comprising intrapersonal, interpersonal, and developmental components (Northouse, 2022).

Critical-Interpretivism: A researcher stance focused upon aspects of reality inclusive of: an experience of socially-constructed, subjective reality; researcher reflexivity, qualitative methods of investigation; situated within structural and equity-related aspects of being and society. (Ponterotto, 2005).

Culturally-Responsive School Leadership: An educational leadership perspective, informed by critical and post-modern paradigms of knowledge, which emphasizes the development of critical consciousness and anti-oppressive action (Capper, 2019).

Distributed Leadership: A leadership stance based upon distributed cognition, reciprocal systemic processes, and formal and informal leadership structures (Harris & Spillane, 2008).

Institutional Isomorphisms: Constraining forces experienced by organizations within an established organizational field (DiMaggio & Powell, 1983).

Multi-Tiered System of Supports: An integrative, systemic approach to promoting positive student academic, social-emotional, and behavioural growth (Goodman-Scott et al., 2019).

Neo-Institutional Theory: A theoretical perspective grounded in the study of organizations based upon formal and informal forces that constrain and enable institutional and individual agency (Alvesson & Spicer, 2019; Greenwood & Meyer, 2008).

Neoliberalism: A school of economic thought based upon the principles of free-market competition, consumerism, rationalism, and individualism (Starr, 2019).

Positive Psychological Intervention: A structured series of school activities in which students are encouraged to generate direct experiences, and reflect upon, positive emotional states and traits (Chuecas et al., 2022).

Professional Learning Community: An educational intervention where collaborative workplace teams raise awareness and create new learning from a shared-meaning making process on identified thematic areas of practice (Wilhelm, 2016).

Trauma: An inner injury due to difficult or hurtful events that result in impaired functioning. Evidence of trauma can include depersonalization, impaired response flexibility, and distortions relating to self-concept, relationships, and worldview (Maté & Maté, 2022).

Wellbeing: A complex, multi-dimensional phenomenon used to conceptualize and assess quality of life (Lewis, 2020).

Chapter 1: Setting the Context for Change

Within a contemporary context of worsening youth social-emotional and mental health outcomes (Chiu et al., 2020; Twenge et al., 2019; Winkler et al., 2020), educators in K-12 settings face an increasingly complex and challenging climate to support student learning and wellbeing. The necessity for increased sensitivity, awareness, and skill within schools to better meet the emerging mental health needs of students has never been greater with strong evidence pointing to the influential role of schooling to support positive student outcomes (Halladay et al., 2022; Fry et al., 2023). The following chapter situates this predicament within the local environment of my school, Bitter Greens Academy (BGA, a pseudonym), and discusses foundational concepts, contexts, and considerations to frame my leadership agency, positionality, and vision for change to improve student mental health and wellbeing. The chapter presents the following sections including, positionality and lens statement, organizational context, leadership problem of practice (PoP), framing the problem of practice, guiding questions from the PoP, and leadership-focused vision for change.

Positionality and Lens Statement

The following section briefly outlines my positionality, lens, and leadership position to contextualize my willingness and ability to conduct organizational change. Attending to the inherent complexities of researcher positionality (Holmes, 2020), consideration is given to the intersections of personal, professional, and organizational space.

Positionality

I have always had a strong sense of being of service to others in my life. Initially, I thought that I would fulfill this aim with a career in government and public policy; however, through lived experience and painful reflection (Bayda, 2003), I became aware that by pursuing that path, I had become increasingly unhappy and distanced from myself; I was living an inauthentic life. Armed with this realization, I turned my outward, conventional life upside down to align with my growing understanding of my larger sense of moral purpose and meaning (Gino et al., 2015). This development led me to pursue a career as an educator and guidance counsellor within the school

system in addition to a complementary path as a registered psychotherapist outside of it. My leadership and researcher positionalities are embodied within these roles and experiences: a blend of personal and professional, immersed in dialogue and reflection, and building a more integrated experience of myself as an agent of change in the world. At the same time, I recognize that identity-related dimensions inform my positionality. As a cis-gendered, able-bodied, middle-aged, male of European descent, my ability to reflect and pivot my personal life and professional career has been and continues to be enabled by White privilege (DiAngelo, 2018), colonial structures of oppression and domination (Shah, 2021), and other normative discourses and related power structures in society (Capper, 2019). I recognize and acknowledge that working with my privilege and positionality is an essential ingredient of the work of promoting new positive social imaginaries (Rexhepi & Torres, 2011).

Lens

Raised by wartime immigrant parents, from a young age I internalized their innate moral sensibility for diligence, justice, fairness, and a principled approach when relating with others. This imprint informs my sense of a duty of care, justice, and critique (Ehrich et al., 2015; Shapiro & Stefkovich, 2016) necessary to lead. I firmly believe that “the ultimate joys are moral joys” (Brooks, 2015, p. 15) and value self-development and leadership guided by self-awareness and self-regulation, which helps me to be consistent and approachable. I believe that values such as inclusive relational empathy (Banwo et al., 2022), compassion, selflessness, positivity, and authenticity reflect my egalitarian conviction that we are all learners on a path of self-discovery. Through working with peers in this program, I also see the importance of collaboration and trust. Building relationships and investing in each other has given me space to consider that the give-and-take of teamwork requires openness, flexibility, and responsiveness. When balanced correctly, harnessing team and systems processes increases vision and capacity.

As a researcher in the social sciences and a change agent situated within an organizational context, I am drawn to constructivist-interpretivist epistemologies (Ponterotto, 2005) or ways of

knowing. Inhabiting this worldview through my academic training and professional experience as a counsellor and psychotherapist, I regularly witness the curative power of stories, deep listening, and compassion to promote positive change (Madigan, 2019; Villatte et al., 2015). This stance informs my theorizing and exploration of my PoP in addition to forming the basis of my aspired-to researcher stance of active reflexivity based on humility (Soedirgo & Glas, 2020) and an acknowledgement of the inherently subjective and complex nature of social reality.

At the same time, I aspire to encounter the external world from not only a constructivist epistemic stance but also through an activist and transformative lens (Shields, 2019). As highlighted by critical education researchers (Banwo et al., 2022; Dei, 2018; Khalifa et al., 2016), examining my own personal and professional identities, geographies, and interdependencies matter and form the basis of a critical praxis supporting the investigation of my PoP. Moreover, as I have come to understand, rather than standing in isolation, a critical approach places individual self-actualization within manifestations of collective struggle and historical oppression. Lastly, I recognize that being a principled person and leader means extending my awareness and moral compass to include multiple and holistic ways of knowing, inclusive of frameworks such as *Ethuaptmumk* “Two-Eyed Seeing” (Marshall, 2004; McKinley, 2020). My understanding and appreciation for the importance of Indigenous knowledges arises in part from my experiences of working with Indigenous communities in Latin America and also through participating in collaborations with Indigenous-focused schools in the Greater Toronto Area. I am grateful for these experiences and future opportunities to unlearn inherited settler orthodoxies and discourses. Importantly, my lens as a researcher and investigator leading change is informed and enriched through these experiences and understandings.

Leadership Position

At the time of writing, I have worked at BGA for five years as a guidance counsellor and head of guidance with responsibilities to ensure effective development and delivery of student social-emotional support including: counselling, referral, and intervention services; curriculum programming; career development; community outreach; and school-wide leadership. This formal leadership

position provides me with institutional agency and power to influence and enact policies, processes, and procedures for the betterment of the school community and students, in addition to oversight of faculty and staff within the department. Key aspects of my leadership position with respect to power and agency within BGA will be explored further in the leadership approaches section of Chapter 2 to contextualize further scope for leadership within the PoP. Furthermore, the role encompasses membership in important school horizontal co-ordinating structures such as the Senior Leadership Team (SLT), comprising senior level administrators, and the Student Success Team (SST), a multi-professionalized group comprising learning strategists, guidance counsellors, and administrators. Sitting on these collaborative teams provides me with several advantages to conduct organizational change, such as: more frequent access to resources, senior leaders, and varied personnel within BGA; increased knowledge of strategic organizational data and information; and higher informal social status derived from increased proximity to, and higher-quality relationships with, school leaders. Research supports the connection between guidance counsellor leadership and effective principal-counsellor collaboration, which has been demonstrated to produce positive outcomes related to student achievement, school culture, and delivery of counselling services, respectively (Reavie, 2015; Rock et al., 2017; Yavuz et al., 2017). Moreover, my professional qualifications as a registered psychotherapist and certified counsellor lend further credibility and expert status in the domain of social-emotional development, and as a result, leverage my capacity within the organization to influence faculty and staff.

Further to content expertise and counsellor leadership at BGA, I have developed a framework for delivery of counsellor services and program curriculum based upon tenets of positive psychology (Seligman, 2018), self-compassion (Hobbs & Tamura, 2022), and mindfulness-based practices (Siegel, 2011, 2020), in addition to leading regular workshops for students, faculty, and staff. As a result, I am drawn to emergent, process-based leadership frameworks such as authentic and adaptive approaches (Northouse, 2022) that involve components geared toward balanced processing, meaning-making, and intrinsically fulfilling leader and follower relationships that will be

further discussed in Chapter 2. Taken as a whole, the combination of my leadership positionality, lens, formal and informal position provides the required agency and legitimacy to support important school-wide counsellor leadership functions at BGA (DeKruyf et al., 2013; Janson et al., 2009; Reavie, 2015; Rock et al., 2017), in addition to gaining access to important formal decision-making structures and individuals in order to facilitate the proposed change process from an incumbent position within BGA (Battilana, 2006).

Organizational Context

The following section outlines external and internal contexts corresponding to organizational change leadership at BGA. Relevant political, economic, social, policy, and equity-related factors are discussed alongside organizational structure, leadership approaches, and social justice considerations.

Institutional Context

BGA is a medium-sized, tuition-funded, co-educational independent school located in the suburbs of a large Canadian city. The school offers two academically rigorous, accredited programs: the Lower School (pre-school to grade 6) pursues the Inquiry-Based Learning Philosophy (IBLP, a pseudonym) and the Upper School (grades 7 to 12) follows the University Preparatory Program (UPP, a pseudonym). In a sound financial position, BGA can dedicate resources to identified areas without significant constraints. BGA's organizational structure closely resembles a professional bureaucracy, organized in a divisionalized form (Bolman & Deal, 2021, p. 83-84). Aligned vertically, authority flows hierarchically from the strategic apex of senior leadership, through midline management (UPP co-ordinators), to a significant operational core of teaching faculty. My position as head of guidance is located in the technostructure composed of learning strategists and other guidance professionals.

Policy and Governance

BGA's organizational context is predominantly influenced by structural functionalist epistemology (Capper, 2019), rooted in the modernist, positivist tradition (Adams & Buetow, 2014; Ponterotto, 2002). Products of this epistemology at BGA include hierarchical co-ordination and division of labour, a reliance on quantitative evidence to inform policy, processes, and procedures, and the development of command and control structures to influence organizational behaviour. Against this theoretical backdrop, socio-political philosophies inclusive of conservative, liberal, and neoliberal agendas (Davies & Bansel, 2007; de Saxe et al., 2020; Gutek, 2013; Plazek, 2012; Starr, 2019) shape organizational perceptions and problem solving at a local level.

The policy governance model at BGA is a board of trustees, composed of volunteers from the school community or community at large, whose mandate is to ensure the school fulfills its fiduciary and financial obligations. The board of trustees is also responsible for the selection, support, and evaluation of the head of school, who is charged with ensuring the successful operation of the school, including management, personnel, and programmatic issues. Operating as a non-profit organization, BGA is independent of provincial government supervision in accordance with the requirements of the Education Act (Government of Ontario, 2022). However, in seeking to grant an Ontario Secondary School Diploma (OSSD), the school is inspected by the Ontario Ministry of Education every two years to ensure compliance with provincial standards and graduation requirements.

External structures that influence governance and policy include school membership in international and national accrediting organizations, such as the UPP and IBLP, each involving accreditation processes around curriculum and program standards. Additionally, BGA is a member of the Canadian Accredited Independent Schools (CAIS) (Canadian Accredited Independent Schools, 2023), by which accreditation is reviewed every five years by a visiting committee that examines areas such as academic program, governance, facilities, overall school improvement, and co-curricular and student life programming, among others. Compliance with external

standards, as well as programmatic decisions and school policy, fall under the responsibility of the head of school, supported by the senior leadership team.

Political and Economic Factors

Operating within the independent school market, BGA exists within the larger socio-economic narrative of hegemonic neoliberalism (Davies & Bansel, 2007; de Saxe et al., 2020; Starr, 2019) and is subject to the commodifying forces of markets and the emergent financial, enterprise, and reputational risks inherent in the current macro-level environment. Independent schools as organizations compete for legitimacy and access to resources within this established field, and have increasingly emphasized standardization, accountability, and test-driven competition (Apple, 2016) with resultant organizational approaches borrowing from rationalist, managerialist and new public management perspectives (Simons et al., 2009).

Specific to BGA, securing student enrolment and financial capital to ensure organizational security has been a significant external driver of strategy and organizational structure and behaviour. For example, recent expansion of facilities and enrolment increases can be viewed as developments to enhance the student experience, align more with competitor offerings, and entice prospective families to join the school. Further, flexible labour markets and highly-selective post-secondary institutions reinforce pressure on BGA's gatekeeper function to provide access for students to acquire social and educational capital beyond their time at the school. As such, parental influence and pressure are significant in a results-driven culture and can be understood as an extension of the hyper-competitive educational market forces at play.

Social and Cultural Factors

Current socio-cultural factors significantly influence BGA and its educational mandate. The pervasive influence and rapidly changing use of technology have made for a more complex transition to adulthood for many adolescents (Twenge, 2023). Moreover, today's youth have a more liberal outlook on lifestyle and raised racial consciousness compared to previous generations in addition to increased rates of gender fluidity and affinity for 2SLGBTQ+ communities (Twenge, 2023,

p. 347). Additionally, youth mental health statistics are increasingly seen at alarmingly low levels with researchers continuing to study the adverse effects of the COVID-19 pandemic (Pfefferbaum, 2021), and smartphone use (Sohn et al., 2019) on mental health. Compared to previous generations, Generation Z as a cohort is likely to have the following characteristics related to mental health: increased depression and anxiety; external locus of control, loneliness, and pessimism; and a lower level of overall physical activity (Twenge, 2023).

Leadership Approaches

A combination of transformational, instructional, and distributed or shared leadership styles and practices are evident at BGA to varying degrees dependent upon context, relative position, and staff function within the school. Senior administration leadership perspectives most closely resemble a transformational style. Bass' transformational leadership factors (1995) are evidenced by the school administration's concern for the emotional wellbeing of staff and students, inspirational motivation at regular staff meetings and community gatherings, curiosity and influence on improving professional practice, and individualized consideration alongside attention to long-term school goals. Within the context of a non-unionized, tuition-funded independent school, appeals to the transformational nature of schooling serve both as an intrinsic motivating function and a practical engagement strategy to achieve greater levels of dedication and contribution from faculty and staff (Chua & Ayoko, 2021).

In addition to transformational leadership, instructional leadership is embedded within vertical structures of accountability. Direct instructional leadership dimensions highlighted by Bendikson et al. (2012) and Hallinger (2005), such as goal setting, ensuring quality teaching, professional development, and developing a sense of collective responsibility, is prominently evidenced by the school's resource and time allocation to improving the instructional program, inclusion of leadership positions specific to the coordination of the academic program and subject discipline–specific department chair positions, and generous resource allocation to professional development. Lastly, distributed or shared forms of leadership (Gronn, 2002; Harris & Spillane, 2008; Leemans,

2017) is evidenced in the existence of intra-school, collaborative cross-sectional teams to support administration and student support functions and in frequent informal co-ordination and implementation of many aspects of the student life and co-curricular programs.

Addressing Issues of Equity, Diversity, Identity, and Decolonization

Situated within a Eurocentric, neocolonial, neoliberal, positivistic epistemological and cultural paradigm, BGA's organizational structures, processes, and educational practices sit largely uninformed by critical perspectives and non-Western ways of knowing. At the same time, BGA leadership has indicated a growing commitment to raise awareness and introduce anti-oppressive initiatives school-wide. Within a post-Truth and Reconciliation Commission (2015) historical Canadian context, this institutional willingness is evident in BGA's recent development of a land acknowledgement statement and attempts to form relationships with local Indigenous groups to promote action to redress colonial legacies and structures that contribute to the marginalization of First Nations, Inuit, and Métis peoples. Moreover, in BGA's current strategic planning cycle, the school has identified priorities of supporting student mental health and wellbeing alongside consideration of issues relating to innovation, community engagement, and equity, diversity, and inclusion.

Leadership Problem of Practice

The following section outlines the identified problem of practice to highlight key gaps in current practices and problematize the PoP within my organizational context.

Problem of Practice Statement

The problem of practice that will be investigated is the lack of awareness and strategic engagement around student mental health and wellbeing support at BGA, a medium-sized, tuition-funded, co-educational independent school located in the suburbs of a large Canadian city. Unique among faculty and school staff, guidance counsellors are well positioned to play a positive leadership role in this area because they possess relevant specialist social-emotional content knowledge and skills-based expertise (Allan & Moffat, 2016); occupy an important position within related social

networks to engage in distributed (Gronn, 2002; Harris & Spillane, 2008; Leemans, 2017) and relational (Cunliffe & Eriksen, 2011) leadership to influence multiple stakeholders toward positive mental health outcomes; and, with institutional support, can assist school leadership in the development and implementation of both comprehensive and targeted student support services and programs (DeKruyf et al., 2013; Janson et al., 2009; Reavie, 2015; Rock et al., 2017).

At the time of writing, BGA counsellor leadership is conceptualized and practiced traditionally as individual relational support and academic counselling rather than a conjoint role of educational and mental health leadership. This narrow definition and scope create an organizational knowledge gap in social-emotional learning and wellbeing best practices. For example, BGA faculty and staff do not have training in youth mental health first aid or other professional development demonstrated to be effective in supporting students (Gryglewicz et al., 2018) and, as a result, when presented with students in need, lack requisite skills and experiences to assist in consistently helpful ways. This deficiency is further evidenced by internal community survey results that indicate high levels of student perceived stress and the expressed desire of multiple stakeholders for greater student wellbeing support (Fast Forward Educational Consulting, 2021). Further, a paucity of policies, procedures, and training for supporting students who belong to the 2SLGBTQ+ and other marginalized identities highlight significant gaps in current wellbeing practices from a social justice perspective (Capper, 2019). BGA's current institutional blindness towards equity-related issues has been identified as a priority to redress in the current strategic plan.

Informal feedback from faculty on the subject further presents the PoP as an area in need of internal capacity development. Teachers frequently discuss feeling ill-equipped to support perceived growing student mental health needs. This finding is echoed in the wider literature on teacher perception of preparedness to manage student mental health concerns (Deaton et al., 2022; Firestone & Cruz, 2023). As an ethical and practical imperative to foster student learning, faculty must be involved in creating safe emotional spaces for students. Student psychological safety and engagement are associated with higher indicators of youth wellbeing (Nguyen et al., 2021) and have

been shown to enable student creativity (Han et al., 2022), and moderate perceived quality of student experience in the classroom (Ayub et al., 2022). The requirement to foster student emotional safety necessitates a school-wide approach and professional development. In this way, addressing the gap between the current state of organizational capacity and the desired future will require full-school buy-in and engagement.

Without adequate mental health support, a young person's ability to make meaningful social connections, succeed at their studies, and otherwise participate in school and home life successfully can be significantly impaired and have long-term negative consequences (Merikangas et al., 2010). This challenge is exacerbated by the negative stigma attached to seeking youth mental health services (Ferrie et al., 2020), lack of treatment access (Merikangas et al., 2011), low prevalence of youth help-seeking behaviours (O'Connor et al., 2014), and the existence of equity-based systemic barriers to youth mental health care (Castro-Ramirez et al., 2021; Fante-Coleman & Jackson-Best, 2020). To lead sustainable organizational change, institutional actors must carry out a series of complex, coordinated activities over time; moving individuals and the organization from a current status quo to a more desirable future state. In crafting a process that addresses the PoP, how might counsellor leadership be effectively leveraged at BGA to support awareness-raising and strategic engagement around improving student mental health and wellbeing?

Framing the Problem of Practice

Problem of Practice Contexts

The following section places the PoP within relevant contexts to conceptualize external and internal forces that influence the scope for leadership and change potential at BGA. Situating youth mental health and wellbeing within a critical-interpretivist paradigm, this section presents the utility of using a trauma-informed perspective to contextualize and discuss important macro-level trends that influence the PoP.

Critical-Interpretivism

Wellbeing as a phenomenon is subjectively experienced, contains both eudaimonic (e.g. value-informed) and hedonic (e.g. subjective experiential) aspects, and is dependent on group, environmental, and cultural factors (Lewis, 2020). At the same time, wellbeing is experienced as uniquely and intrinsically personal. These complex characteristics make wellbeing a topic that can readily be explored through a constructivist-interpretivist epistemological lens with its emphasis on subjective, socially constructed meaning making, researcher reflexivity, and qualitative methods of investigation (Ponterotto, 2005). Understanding in greater detail and specificity the lived experience of students and staff at BGA is important to gain a more nuanced conception of individual and group realities as they pertain to the PoP on mental health and wellbeing. Moreover, viewed from this approach, including my own leader and researcher perspective as an embedded agent within the change process, would help to further contextualize and ground the project within formal and informal relationships and power dynamics internal to the organization. This stance allows for greater awareness and sensitivity to relationships and meaning that can be leveraged to understand better, motivate, and ultimately promote change more effectively. Applications of participatory methods of data gathering aligned with this perspective, such as interviews, workshops, and focus groups, among others, will be discussed further in the change implementation section (Creswell & Creswell, 2023; Dugan & Safir, 2021).

At the same time, reflecting on a critical epistemological stance (Capper, 2019), a critical researcher's proactive values toward social justice and sensitivity to power dynamics are important to highlight anti-oppressive aspects of wellbeing when working with diverse populations (Banwo et al., 2022; Khalifa et al., 2016; Ladson-Billings, 2009), as well as providing a needed level of researcher reflexivity. To this end, BGA's student population demographics are ethnically diverse with over eighty percent of the student body belonging to underrepresented groups such as East Asian Canadian, South Asian Canadian, and Iranian Canadian. At the same time, faculty and staff are predominantly European Canadian. A researcher and leadership lens that includes critical conceptions of culture and identity is imperative for an ethical change process and outcomes.

Trauma and Social Justice

Further to using a critically-informed researcher and leadership lens, research and practice in trauma-informed systems and care, originating from the fields of health care and psychology (Brandell & Ringel, 2019; Guest, 2021; Maté & Maté, 2022; van der Kolk, 2014), are increasingly being applied to education to support student mental health and wellbeing (Berger & Martin, 2021; Chafouleas et al., 2021; Cohen & Barron, 2021; Herrenkohl et al., 2019; Thomas et al., 2019; Wassink-de Stigter et al., 2022). Trauma can be generally defined as an inner injury due to difficult or hurtful events that results in impaired functioning. Typical presentation of trauma in individuals can include depersonalization, impaired response flexibility, and distortions relating to self-concept, relationships, and worldview (Maté & Maté, 2022, pp. 20-32). As an important theoretical lens and guiding framework to examine the PoP, a trauma-informed perspective is particularly germane in that it (a) can be applied to organizational design, behaviour, and change processes (SAMHSA, 2014); (b) represents an important complement to an anti-oppressive praxis based on its ability to account for the disproportionate impacts of trauma on youth from marginalized communities (Lal, 2021; Lee & Boykins, 2022), the legacy of colonization on the education system and the need for decolonization work to be undertaken to promote healing, the harmful effects of dominant discourses on wellbeing, and the deprofessionalization of education workers (Gherardi et al., 2020); and (c) provides conceptual clarity and focus to the potentially ambiguous and subjective nature of wellbeing measures.

Youth Mental Health, Social Justice, and Schooling

Adolescence represents a key developmental period along the lifespan, characterized by significant psychosocial, emotional, and biological change (Choudhury et al., 2008; Siegel, 2013). Although most youth navigate this transitional phase successfully, a significant portion experience difficulty in functioning that persists throughout their lifespan (Merikangas et al., 2010; Tupper, 2017). According to findings from Kessler et al. (2007), the median age-of-onset for fifty percent of mental health disorders occurs from mid-teens to early twenties, with over three-quarters of mental

illness prevalent over the lifespan present by late adolescence (p. 359). Similarly, research suggests that approximately two thirds of U.S. children have experienced at least one traumatic event before age 16 (Fondren et al., 2020). Given the prevalence and coincidence of trauma and mental health challenges experienced during adolescence, trauma-informed interventions targeting this formative period would pay large dividends for society well into the future.

Further, amid an overall decline in youth mental health outcomes, adolescents identifying as belonging to marginalized identities such as 2SLGBTQ+ have been demonstrated to experience worse mental health outcomes compared to those from non-marginalized identities (Price & Hollinsaid, 2022) because 2SLGBTQ+ youth experience elevated social risk factors and increased exposure to trauma and adverse childhood experiences such as greater incidence of family conflict, substance abuse, negative social stigma, and discrimination, in addition to psychological factors that worsen poor mental health outcomes (Russell & Fish, 2016). These realities are further compounded by structural elements such as an absence of institutionalized protections and biased-based bullying that 2SLGBTQ+ youth experience at higher rates than other populations (Russell & Fish, 2016, p. 473).

As a counterbalance to these negative trends in youth mental health, community-based services have grown in importance over the last 30 years (Canadian Mental Health Association, 2023). Situated within communities, schools represent an important site for youth to access treatment and services, in addition to providing universal interventions to promote overall student wellbeing. Schools have been shown to play a pivotal role in identifying, supporting, and connecting youth with appropriate mental health resources (Herman et al., 2020) with an emerging research base attesting to the efficacy of school-based mental health (SBMH) initiatives and positive psychology interventions (PPIs) on youth mental health outcomes (O'Reilly et al., 2018; Shankland & Rosset, 2017; Tejada-Gallardo et al., 2020).

Organizational Fields and the PoP

Using a neo-institutional theoretical perspective (Alvesson & Spicer, 2019; Greenwood & Meyer, 2008), this section explores internal and external factors that shape institutional culture and possibilities for change agency around the PoP at BGA.

Institutional Isomorphisms

According to neo-institutional theory, rather than exist in isolation, organizations inhabit established, structured fields that influence their behaviour and development over time. Each organization, while responding to local conditions, navigates field-wide pressures such as social, financial, political, legal, and environmental factors to gain legitimacy and ensure access to necessary resources (Machin, 2019, p. 115). In their seminal paper on the topic, DiMaggio & Powell (1983) outline three distinct forces, called isomorphisms, that constrain organizations and shape institutional agency for leadership. Isomorphisms relevant to understanding BGA and the PoP include: coercive isomorphism that results from authority and political power differences; mimetic isomorphism which is produced from conformist pressures, given conditions of uncertainty and ambiguity; and normative isomorphism that is created by processes of professionalization over time (p. 150). In the context of BGA, isomorphic forces have significantly influenced organizational design and change trajectory, thereby impacting organizational behaviour, leadership, and the PoP.

Coercive Isomorphism

Membership in external accreditation organizations and regulatory bodies has been demonstrated to exert significant conformist pressure on independent and international schools (Coutet, 2022). BGA's membership in no less than three national and international accrediting agencies shape the school's organizational structures and behavioural incentives towards a hierarchical, vertically-aligned structure to ensure command and control of internal processes and procedures typical of a mechanistic organization (Deszca et al., 2020, p.155). In particular, within the realm of academic achievement and programming, there exists a focus on replicability of results, error avoidance, and external validation of student academic knowledge, supported by a

structural-functionalist epistemological view of the organization (Capper, 2019). Within the realm of the PoP, coercive isomorphism has focused resources toward more traditional modes of schooling in support of academic success and compliance with external standards of accrediting bodies to which BGA is a member. Further, as the school has grown in both student population and program offerings, student services and supports have remained underdeveloped partly because of a lack of internal and external accountability structures. At the same time, recent inclusions of a wellbeing lens on particular accreditation processes and standards (Canadian Accredited Independent Schools, 2023) focus more holistically on student wellbeing and represent an important change driver that positively impacts willingness to explore solutions to the PoP.

Mimetic Isomorphism

Peer schools within the independent and international school network influence BGA's organizational behaviour through participation in collegial networking events, leadership conferences, common educational opportunities, sports associations, and access to opportunities that serve to bolster knowledge and capacity building. Specific to the PoP, wellbeing workshops and leader networking have arisen over the past decade and demonstrate a growing trend in the education sector. Certain colleague schools have invested more heavily than BGA in wellbeing infrastructure, inclusive of roles and organizational structures that place greater oversight, resources, and organizational supports and programs targeted to wellbeing. Additionally, institutional actors in the field of mental health and schooling, such as School Mental Health Ontario (SMHO), act as knowledge brokers to facilitate and guide schools to implement best practices. These organizations can be used as models for BGA and influence decision makers within the realm of the PoP. With greater inter-school collaboration and competitive forces that bring increased parental expectations, mimetic pressures create opportunities at BGA to enhance student support services for students and families and serve as an important external driver of change.

Normative Isomorphism

Greater professionalization in the field of education and professional standards create field-based pressures to conform with provincial teacher standards of practice, employee performance reviews, and other certification and licensing bodies encouraging homogenization of practices. For example, justification for BGA's recent adoption of a performance appraisal program was in part presented as fulfilling the school's mandate for an upcoming accreditation visit. Related to the PoP space, social workers and other professionals are increasingly working in schools to provide more enhanced psychological support to students and families with greater specialization. For instance, within the field of counselling psychology, the role of guidance counsellor has evolved to encompass a more multi-dimensional function in schools (Ontario School Counsellors Association, 2023). Although teacher certification and best practices are widely established at BGA, professionalization of counsellors and counsellor education has yet to develop with wide differences in educational credentials and work experience present in the department at the time of writing. This situation serves as both a barrier to effective teamwork and practices, yet, also represents a positive possibility for synergy and diversity in group processes that ultimately can make student support more collectively effective if leveraged appropriately. These internal dynamics will be further explored in the change leadership section of Chapter 2.

Guiding Questions from the PoP

Examining possibilities for change and leadership within the context of institutional isomorphisms and competitive pressures is important as "institutions do not merely constrain human agency; they are first and foremost the product of human agency" (Battilana, 2006, p. 654). Constraining influences shape to a large extent BGA's ability to flexibly respond and adapt to external and internal pressures, yet at the same time, from a culturalist perspective, organizational responses to the environment, informed by local conditions, represent possibilities for institutional agency and purposeful leadership (Coutet, 2022). Focusing on possibilities for agency and local contexts, the following section presents guiding questions to investigate the PoP using Bolman and Deal's (2021) structural, human resources, political, and symbolic frames. Utilized as a

simplifying heuristic to analyze differing dimensions of organizational design and behaviour, these frames serve to orient key questions around scope for leadership agency and change processes at the local level while accounting for previously discussed constraining institutional isomorphic forces.

Structural

BGA's governance, policy development, and bureaucratic organizational structure are highly influenced by structural functionalist epistemology, evidenced by a vertical authority structure to formulate and implement organizational policies, processes, and procedures, along with select horizontal structures such as the SLT and SST to coordinate diverse staff and cross-functional roles. As a result of its vertical and horizontal organizational structure, BGA has developed significant organizational capacity to support student academic achievement, yet, a structural functionalist perspective hinders cultural responsiveness, misses key qualitative data around the student experience, and limits the organization's ability to meet emerging needs to support student mental health and wellbeing. As noted by Joseph & Gaba (2020), drawbacks of hierarchical organization include difficulties in bringing new "bottom-up" information to decision makers. As currently designed, there exists a paucity of information about student mental health, wellbeing, and equity-related data available to decision makers. A key question from a structural frame is: How might existing structures be adapted, or new structures be introduced, to engage broader participation and capture feedback to guide improvement in student support?

Human Resources

Research indicates that participatory approaches to planning and implementing wellbeing interventions in schools can result in positive externalities such as improved teacher resiliency and community wellbeing (Ott et al., 2017). This shift implies an epistemological emphasis on seeking qualitative data (Taylor & Medina, 2011) and points to the positive benefits of increasing collaboration and partnership among various community partners (Green, 2017). Moreover, when seen from a systems perspective (Senge et al., 2019), an emphasis on holistic and participatory

processes that involve faculty and school staff can more practically be seen as meeting the needs of not only students but also faculty and staff within schools. From this perspective, questions around using the existent organizational capacity for distributed leadership (Gronn, 2002; Harris & Spillane, 2008; Leemans, 2017) within school operations at BGA present opportunities for greater inquiry, collaboration, and engagement to explore the PoP. How can faculty and staff be meaningfully engaged in the change process?

Symbolic

BGA's cultural practices are influenced by multiple factors related to the PoP. As pointed out by Schein & Schein (2017), an organization's cultural DNA is formed as a problem-solving orientation linked to its continued survival within its environment (p. 7). Within its cultural conditions, BGA has developed a dominant narrative focused on academic excellence as a gateway to career and educational opportunities as an elite independent school. Consequently, school change initiatives are highly scrutinized when not explicitly tied to academic achievement. This perspective poses a key question: How might divergent organizational change regarding the PoP navigate potential constraints and cultural barriers?

Political

Change leaders within organizations are faced with the pragmatic reality of needing to navigate power dynamics to acquire scarce resources. As Krautzberger et al. (2021) point out, this task is further complicated by the risk of social injury and loss of status if change efforts fail, arguing that, to lower vulnerability, institutionally embedded actors should conceal and then gradually reveal their intentional work on institutional change (p. 683). To this end, and taking the previous guiding questions to heart, the change process within BGA will leverage current power dynamics to facilitate change and minimize risk for both change leaders and followers.

Leadership-Focused Vision for Change

The following section articulates a leadership-focused vision for change comprised of the following elements: (a) detailed vision for change; (b) the perceived gap between current practices

and a desired future organizational state; (c) social justice and ethical issues related to the change process; (d) priorities for change; and, (e) leadership considerations. Utilizing the Substance Abuse and Mental Health Secretariat Agency's (SAMHSA) 2014 guiding conception of a trauma-informed approach as reference point, BGA's cultural context will be explored to problematize dimensions of the PoP within relevant organizational conditions and map out potential terrain for change leadership.

Vision for Change

Amid an environment of worsening mental health outcomes for today's youth (Twenge, 2023), the importance of schooling to support both cognitive and affective domains of student functioning has grown in societal importance and potential impact (Herman et al., 2020). As articulated in the previous section, essential to a vision for change at BGA is the idea that an integrated, holistic, and participative approach to organizational change is justified given the complex nature of wellbeing as a construct (Lewis, 2020), the necessity for stakeholder engagement and reflection to promote a learning culture conducive to organizational change and learning (Argyris & Schön, 1997; Houchens & Keedy, 2009), and the need to address and deconstruct systemic structural barriers through socially just (Gamby et al., 2021) and trauma-informed perspectives (Brandell & Ringel, 2019; Chafouleas et al., 2021). Through participating in the change process, staff and faculty at BGA will increase their capacity to support student mental health and wellbeing and as a result be better able to realize the pervasiveness of external and internal stressors affecting mental health and wellbeing of students; recognize the signs and symptoms of distress; be able to respond more appropriately with evidence-based practices; and through reflection and dialogue, promote sustainable organizational and individual practices that further student mental health and resilience (SAMHSA, 2014, pp. 9-10).

Leadership at BGA aspires to create an organizational culture wherein individuals, regardless of status or position within the school, feel comfortable to express their authentic selves and genuinely engage with students and others from a place of empathy, compassion and personal understanding. In support of this desired outcome and, informed by an ethic of care and critique

(Ehrich et al., 2015; Shapiro & Stefkovich, 2016), aspirational institutional values and principles such as: psychological safety; trustworthiness and transparency; peer support; collaboration and mutuality; empowerment, voice and choice; and, cultural, historical, and gender issues (SAMHSA, 2014, p.10); will inform the change process. These principles also adventitiously allow for increased change implementation efficacy in serving as potential values-based monitoring and evaluation criteria, alignment of the change process within a critical-interpretivist researcher and leadership stance, while also representing important axiological and teleological components of the vision for change.

From a practical perspective, existent literature on school reform and provision of mental health services point towards the efficacy of inclusive and participatory modes of delivery that provide greater recognition and involvement of school staff, centers culturally responsive instruction, and also increases organizational support for staff wellbeing (Ott et al., 2017; Thomas et al., 2019). Accordingly, a vision for change at BGA that raises organizational capacity with regard to addressing the PoP involves fostering a more collaborative and participatory culture that facilitates professional learning, awareness, and action around improving student mental health and wellbeing supports inclusive of processes, procedures, and ways of being. By taking part in the change process, faculty and staff at BGA will see themselves as positive change agents, foster greater social ties with fellow change participants, and be empowered to influence student mental health and wellbeing positively.

Creating a learning organization that is more holistically oriented around both academic learning and social-emotional development requires increased stakeholder and community engagement alongside addressing structural inequities and power dynamics produced both inside and outside the organization to foster a culturally responsive culture (Khalifa et al., 2016; Shapiro & Stefkovich, 2016; Starratt, 2005; Thomas et al., 2019). The leadership-focused vision for BGA necessarily involves addressing difficult conversations around equity and power within the organization and how students are supported or not based upon historical inequities, power dynamics, and other contributing social factors to marginalization and poor mental health. BGA's school culture will shift towards cultural proficiency, where educators agree and are able to serve

effectively the educational and mental health needs of students from differing, non-dominant cultural backgrounds and identities (Welborn et al., 2022).

Gap Analysis Between the Present and Desired Future Organizational State

As currently constituted, BGA provides an institutional structure and attention that prepares students well for further academic studies and lifelong learning; yet, at the same time, places more acute stressors on students. Suldo et al. (2018) found that students in academically rigorous environments achieve high levels of student academic success and self-efficacy but also demonstrate elevated perceived student academic stress and lower self-reported wellbeing than students in general education. This finding is consistent with internal surveying of students across BGA with perceived stress ratings reported as the lowest across all surveyed domains of subjective student wellbeing categories. Within this wider context and student self-reports, the current school support model for student wellbeing presents significant opportunities for growth. In large part, student services are reactionary and deficit-based; identifying students in need of mental health support only upon onset of difficulties experienced in the classroom or wider school environment. Faculty knowledge with regard to student wellbeing and equity-related fields is low, evidenced by a lack of professional development and training, with practices minimally responsive to students belonging to marginalized groups. With regard to structure and governance, external accountabilities and related isomorphisms influence internal school organization, resource allocation, and faculty collaboration toward a primary focus on fulfilling the academic requirements of a rigorous program to the exclusion of fostering effective social-emotional teaching and learning practices. Taken together, the identified structural and cultural realities frame constraints on school-wide change and describe the gap between the current organizational state and desired future, but also signal opportunities for institutional growth and development in addressing the PoP on student mental health and wellbeing.

Social Justice Considerations

Identity-related aspects of wellbeing and mental health pose challenges to educators, which can problematize delivery of counselling services to students from vulnerable communities and racialized identities (Lal, 2021). As Apple (2016) exhorts in challenging the epistemological fog of dominant discourses, from a critical perspective, supporting mental health necessitates an activist stance in dismantling hegemony through challenging critical dimensions of oppression inclusive of gender-based violence, Eurocentrism, “whiteness”, individualism, ableism, and other normative structures. Practical implications for school leadership and community actors are manifold. In light of the dissimilarity of cultural background between the teaching faculty and the student population, BGA’s parent engagement strategy might productively pivot from traditional, paternalistic, positivistic, and interpretational models toward one of authentic empowerment (Green, 2017). From this perspective, leveraging the cultural capital of students and families with a view to their positionality and intersubjectivity beyond tokenism while de-centering whiteness and other dominant paradigms of learning to consider culturally relevant and holistic ways of knowing would be paramount in exploring improvement of student supports (Shah, 2021). Lastly, acknowledging and working with my own privilege and positionality would be an essential ingredient of a more culturally-responsive leadership (Banwo et al., 2022; Dei, 2018; Khalifa, et al., 2016) and investigation of the PoP.

Change Priorities

The following section briefly outlines three main change priorities to support the leadership-focused vision for change; organizational culture and trust, stakeholder engagement, and communication and community involvement. Each will be addressed in turn in the following section and also be discussed in greater detail as important change priorities of the implementation plan in Chapter 3.

Organizational Culture and Trust

The development of organizational culture results from the aggregation of individual and group problem-solving actions taken over time in response to an institution's environment with evidence of formal culture including an institution's mission, values, strategy, structure, systems and means aimed at development and socialization of employees (Have et al., 2018, p. 6). A common pratfall of organizational improvement efforts is for leaders to make changes without accounting for the complex influences and forces that culture represents. When contemplating divergent organizational change at BGA and the PoP, trust as priority and centerpiece of organizational culture and change cannot be overstated since "trust is an essential, yet a fragile part of organizational life" (Kutsyuruba & Walker, 2016, p. 134). Moreover, trust in superiors and colleagues has been demonstrated to assist individuals cope and adapt to change in organizations (Harden et al., 2020), and be central to the promotion of employee empowerment (Ciulla, 2020). Since the change process at BGA will involve to some degree problematizing the current cultural logic of academic achievement, attention to organization culture and trust is essential to change success as a wide cross-section of stakeholders interact and understand their varying positionalities and perspectives with respect to the PoP.

Stakeholder Engagement

Meaningful engagement of stakeholders is essential to address the PoP. Quality engagement at each stage of the change process has been highlighted as an important and necessary condition for change success in education (Fullan, 2016). Since change within the PoP will involve working with mindsets and behaviours of participants that are deeply held, stressing the importance of emotions and feelings in motivating and sustaining change behaviour will be important to ensure success. In this way, pursuing change through meaning-making and reflective practice is crucial, as Fullan states, "ultimately it comes down to what is going on in one's head" that matters most in developing ideas and capacity to support the change process (Fullan, 2016, p. 39). Further, engaging core social motives such as belonging, understanding, controlling, trusting and enhancing self (Fiske, 2010, p. 6-14), will be a priority for holistically influencing important

internal processes addressing the PoP. More fully engaging stakeholders through participatory processes at BGA during the change process will facilitate the development of key change principles outlined earlier such as psychological safety, mutuality and peer support, and collaborative practices.

Communication and Community Involvement

Ultimately, successful organizational change results in transforming taken-for-granted institutional logic into new ways of being and thinking. Once adopted, desired changes need to be translated and communicated effectively with community members to facilitate each stage of the change process and ensure institutionalization and consolidation of desired outcomes. In particular, from a transformational perspective (Green, 2017), community relationships and partnerships necessarily involve a more equitable stance based upon dialogue and partnership, wherein engagement lowers barriers between school and home (Auerbach, 2010). As outlined previously, parents at BGA have a more conservative cultural ethos (Gutek, 2013) and there currently exist limited external partnerships with community agencies and organizations. Attention to the manner and quality of community involvement as change is made is important to variously build buy-in, identify allies, and move forward on identified priorities.

Leadership Considerations

BGA is at the beginning of a new strategic planning cycle with the board of trustees and head of school indicating that increased resources will be dedicated for enhancing student wellbeing, community development, and sustainability, in addition to diversity, equity, and inclusion initiatives over the next five years. Alignment of the change initiative to the strategic implementation plan will serve to facilitate resource acquisition and muster political will in addition to creating potentially required organizational structures within BGA to facilitate the change process. Additionally, since the change process relates to the intersection of varying leader professional and personal positionalities and perspectives within the organization, care and attention will be given to the ethics of change and leadership to minimize harm to the organization and change participants

while also promoting desired change goals and principles (Ehrich et al., 2015; Shapiro & Stefkovich, 2016; Starratt, 2005) with discussion of relevant dimensions of ethical leadership and paradigms continued in more detail in Chapter 2.

Summary

The preceding chapter presented foundational concepts, contexts, and considerations to frame my leadership agency, positionality, and vision for change to address the PoP and improve student mental health and wellbeing at BGA. Utilizing field theory and a trauma-informed perspective, relevant socio-psychological data was contextualized to better frame and situate the PoP within relevant macro-, meso-, and micro-level contexts along with positioning important change considerations through elaboration of guiding questions, a leadership-focused vision for change, and leadership considerations with emphasis on social justice dimensions and change priorities unique to BGA's institutional context.

Chapter 2: Planning and Development

As discussed in Chapter 1, school represents an important site for the provision of youth mental health services and support (Herman et al., 2020). Within an environment of worsening overall youth mental health outcomes (Chiu et al., 2020; Twenge et al., 2019; Winkler et al., 2020), an ethical imperative exists for educational leaders to incorporate best practices in student mental health and wellbeing services to a greater degree than present. Specific to the context of BGA, attention to organizational context such as cultural conditions and stakeholder realities are crucial to engage change participants and the community in both the process and content of change. Centering important aspects of the PoP, organizational context, vision, and leadership agency outlined in Chapter 1, Chapter 2 discusses and identifies an appropriate leadership approach to change, assesses organizational change readiness, and selects, among viable options, the most suitable organizational strategy to address the PoP accounting for leadership agency, theoretical, and practical concerns. Ethical considerations are further elaborated together with attention to organizational commitments to stakeholders along the change process.

Leadership Approach to Change

This section presents an overview of two theoretical organizational leadership perspectives, authentic leadership (Duignan, 2014) and distributed leadership (Gronn, 2000; Harris & Spillane, 2008; Leemans, 2017), that combined comprise the leadership approach to change. These perspectives are then problematized for their applicability to address the PoP within BGA's organizational context, with attention given to issues related to inter-theoretical alignment, leadership scope and agency, and social justice, in addition to anticipated challenges and synergies posed by wider adoption during the change process to form an authentic, distributed leadership approach (ADL).

Leadership Approaches, Organizational Context and the PoP

The following section describes authentic leadership (AL) and distributed leadership (DL) to establish their relevance and efficacy in diagnosing, analyzing, and facilitating desired change within the PoP at BGA.

Authentic Leadership

According to Northouse (2022), AL is a holistic, multi-faceted leadership perspective comprising intrapersonal, interpersonal, and developmental components. Based on the work of management scholar Bill George (2003), authentic leaders illustrate five dimensions in their role: purpose, values, relationships, self-discipline, and heart; dimensions mediated through characteristics such as passion, prosocial behaviour, connectedness, consistency, and compassion. Furthermore, based on positive psychological tenets such as confidence, hope, optimism, and resilience (Seligman, 2018), an AL approach prizes positive individual and relational attributes along with supportive development of individual self-awareness and meaning-making processes (Skea, 2021). Taken together, these positive traits interact to form AL's distinguishing features, including an internalized moral perspective, balanced processing, and relational transparency (Northouse, 2022, p. 202). From an overall perspective, an AL approach is in alignment with the larger researcher and leadership epistemological frame presented in Chapter 1. For example, informed by the work of Wheatley (2006) on field theory, an authentic leader influences followers' behaviour through acting upon generative fields of influence through moral purpose, values, and vision. This explains the capacity for authentic leaders to influence a system at multiple levels, establishing patterns of non-linear influence flows and forces with an emphasis in the educational literature on co-constructive engagement in school improvement projects (Duignan, 2014, pp. 164-165). AL's emphasis on balanced processing and relational transparency also serve to complement important change leadership functions when preparing and guiding faculty and staff through difficult conversations likely to occur throughout the change process. This

stance is also in alignment with my positionality and scope for leadership as a guidance counsellor and mental health professional.

Further, within the context of the PoP, the model's basis in positive, strength-based psychology (Seligman, 2018) provides important theoretical grounding for supporting student and school mental health. Constructs such as confidence, hope, optimism, and resilience represent curative factors in promoting wellbeing and have been demonstrated to effectively support SBMH initiatives (O'Reilly et al., 2018; Shankland & Rosset, 2017; Tejada-Gallardo et al., 2020), enhance leader endorsement (Steffens et al., 2021), and improve teacher resiliency (Ott et al., 2017). Lastly, an AL approach contains a strong ethical frame and internalized moral reasoning that provides direction and congruence for both the leader and community. AL calls for an ethical stance to leadership, such as Tuana's (2014) moral literacy framework, as an enabler for a more expansive, inclusive viewpoint to assess moral obligations, relationships, and purpose. AL's ethical and multi-faceted perspective is well suited to adopt within the PoP, considering the similarly complex and involved nature of supporting mental health in schools.

Distributed Leadership

Countering the traditional image of the principal as sole leader of a school, DL locates organizational influence and agency in reciprocal systemic processes and networks rather than in roles and individuals (Gronn, 2000; Harris & Spillane, 2008; Leemans, 2017). From this perspective, leadership is understood as inherently systemic, relational, and decentralized, and results from a shared process of sense-making (Skea, 2021) across an organizational field, influencing both formal and informal leadership structures and processes. Central to the discussion of DL is knowledge co-construction through dialogic interactions embedded within organizations (Leemans, 2017, p.14), and when managed in an intentional, holistic manner, the production of reciprocal relationships influences and improves schools by leveraging dynamic, multidirectional social processes. Educational researchers have noted the theory's increasing popularity due to its explanatory power as a framework for understanding contemporary organizational change and

leadership resulting from expanding internal demands on school leadership alongside external complexity and uncertainty that characterizes the realities of contemporary schooling (Harris, 2009, p. 17). Essentially, it takes a village to run a school nowadays; a fact that necessitates a more distributed stance on leadership.

Increased reliance on DL practices has been linked to numerous positive outcomes for schools. For example, extending leadership responsibility beyond the principal has been demonstrated to foster increased positive outcomes on student achievement, increased efficacy of professional learning communities, and an increased level of congruence between norms, behaviours, and collaboration between leadership and teachers (Harris, 2009, pp. 12-13). Further to the role, function, and position of guidance counsellors within schools, using the lens of DL theory can be insightful, both as a theoretical orientation to more effectively conceptualize school counsellors as leaders embedded within an organization, at the nexus of school and community information, and to frame interventions around situations that involve school processes, tools, and structures (Janson et al., 2009). Moreover, from this lens, sources of leadership influence flow from properties such as relational complementarity and possession of specialist knowledge or expertise, characteristics that can be leveraged across stakeholders within an organization independent of hierarchy or positional power. This particular characteristic can greatly inform the change process at BGA, leveraging stakeholder knowledge and participation at various levels of the organization and assist specifically with conceptualization, implementation, and consolidation of desired change processes. In addition, as noted during Chapter 1, a well-established culture of DL exists within BGA. DL serves an important socializing function within the school, in addition to facilitating a high level of faculty involvement in curricular and co-curricular aspects of the organization. Oriented from this perspective, change leadership initiatives can profitably use existing cultural resources to identify allies, build buy-in, and work toward collaborative program implementation aligned to current practices.

Alignment Considerations: An Argument for an Integrated Authentic, Distributed Leadership Approach

The selected theoretical perspectives can be understood as belonging, in part, within the larger epistemological umbrella of constructivist-interpretivist and postpositivist paradigms, placing emphasis on the subjective, constructed nature of knowledge and meaning making, with a central goal to understand human experiences from the point of view of those who live it (Ponterotto, 2005). Both perspectives share idiographic and emic stances toward knowledge that are compatible with important philosophical notions of intersubjectivity, shared knowledge production, and relational processing conducive to examination of the PoP. Each approach also emphasizes group interactions, collaboration, and conceptualizes leadership as activity related to multidirectional, social processes and fields of influence (Wheatley, 2006). Although these fields are generated differentially, AL relies on leadership congruence with inner states, transparency, and moral sensibilities, whereas DL focuses more on multidirectional, social processes and fields of influence, both theories' mechanisms for change involve individuals as social agents acting within networks of shared meaning, and so align in important aspects of theoretical complementarity and practical convergence with my leadership and researcher positionality within BGA. From an overall perspective, although axiological priority of values differs stemming from background theories involved in AL's and DL's theoretical construction, both theories present synergistic and mutually enhancing characteristics that complement each other and effect increased import on the planned change process. Conceptualized as a combined leadership approach, AL's relational, ethical, and affective elements provide necessary grounding and discernment for the practical application of DL. See Appendix A for further elaboration of each leadership approach's theoretical foundations and alignment.

Leadership Position and Agency

An integrated authentic, distributed leadership (ADL) approach to change predicates the ability of leaders to understand and influence the epistemic structure and dynamics of social

networks within institutions to shape individual and group behaviour to desired organizational ends. For example, AL's process-experiential focus on intrapersonal and interpersonal capacities, emphasizing balanced processing, reflexivity, and self-awareness, emphasizes important self-regulatory and adaptive skills necessary to lead collaborative processes. This helping stance of the leader also contributes to promoting emotional intelligence in general and, with regard to my professional positionality, counselor skills and leadership in specific (Mullen et al., 2017). DL's emphasis on distributed cognitive and informational processing and decisions within embedded, relational networks, and supported by AL, utilizes important aspects of my organizational position on horizontal organizing structures such as the SLT and SST. As head of guidance at BGA, senior leaders look to me for guidance around student social-emotional issues to shape school-wide processes and procedures. This important meso-level capacity facilitates a DL perspective on leadership that lies within my scope for leadership.

Social Justice Considerations

As a leadership framework, an ADL approach, through an emphasis on relationships, shared-meaning making, participatory and collaborative processes, qualitative methods of investigation, and embedded moral perspective, can serve to assist marginalized voices and perspectives to be validated and heard with greater clarity and focus. Combined with the larger epistemological view of researcher and leadership lens on critical-interpretivism, culturally responsive practices (Banwo et al., 2022; Dei, 2018; Khalifa et al., 2016) can be fostered to complement the change process. At the same time, organizational leaders can never fully escape from the paradox of embedded agency, the reality that internal change agent actions, intentions, and rationality are all conditioned by the organization they wish to change (Krautzberger et al., 2021, p. 685). Re-traumatizing and oppressive elements of institutional schooling must be kept central to the change process and leadership to ensure equitable organizational change going forward.

Framework for Leading the Change Process

The following section presents an integrated socially just, trauma-informed organizational change framework (Lopez & Jean-Marie, 2021; SAMHSA, 2014) using Lewin's Change-As-Three-Steps (CATS) (1947) model as a consolidating and guiding structure for the change process at BGA. The combination of these three frameworks is intended to assist with structuring equitable processes and outcomes, aligning the change framework to the leadership-focused vision for change and identified principles guiding the vision, and grounding the change implementation process within established best practices in mental health and wellbeing support. See Appendix B for a description and alignment of each step and related characteristics.

Organizational Change Framework

Although critiqued by some as overly simplistic and linear (Cummings et al., 2016; Deszca et al., 2020), Lewin's CATS model (1947) represents a nuanced and holistic view of organizational behaviour and change that continues to influence the field of organizational design (Burnes, 2020; Burnes & Cooke, 2012). Valuing a holistic approach to understanding human behaviour and change, Lewin's model is based upon his study of field theory group dynamics and participatory action research (Burnes, 2020, p. 35). Taken as a whole, Lewin viewed organizational behaviour as fundamentally being dependent upon a field composed of driving and restraining forces, which, in sum, create a dynamic equilibrium or homeostasis. A change agent must first understand these forces, elicit participation and engagement of organizational actors toward promoting desired change, and then take measures to ensure that changes are consolidated to prevent regression to previous modes of being (Burnes, 2020).

Lewin simplified these dynamic processes into three steps: *unfreezing*, *motion* or *change*, and *refreezing*. The change process is divided into three distinct steps as a template for researcher and leader understanding of the dynamics of change and as a helpful heuristic for change leaders to initiate and guide change within organizations. At the unfreezing step, relevant forces, categorized as either restraining or promoting desired change, are analyzed. Once understood at

this step, change initiators are able to raise awareness around the perceived gap between the present situation and desired future and create a sense of urgency for change that can orient or unlock individual and group potential. At the motion or change step, change occurs, placing the organization in a state of flux or uncertainty. At the refreezing step, consolidation of the desired state is conducted, with emphasis given to understanding and mitigating potential individual and group processes that might influence behaviour back toward the previous status quo. In summary, the CATS model builds on field theory to conceptualize change as an involved, social process, requiring a complex understanding of group behaviour and individual psychology.

Application to the PoP

The application of Lewin's CATS model to my PoP holds many advantages. Based on field theory and relevant social-psychological processes, the CATS model aligns with studying a complex, holistic, and subjectively experienced phenomenon, inclusive of individual and group factors, that wellbeing represents. This theoretical congruence allows for a more nuanced understanding of change and supports a highly contextualized understanding of change inherent to applying and integrating insights from the field of mental health, educational leadership, and organizational change. The CATS model also prizes participatory processes and group engagement in change. This stance on involvement in change processes and organizational learning has been demonstrated to foster increased positive outcomes on student achievement, increased efficacy of professional learning communities, and an increased level of congruence between norms, behaviours, and collaboration between leadership and teachers (Harris, 2009, pp. 12-13). Emphasis on relational and participatory aspects of group change also align with an ADL approach for change and situate the change framework within my agency and scope for leadership as head of guidance and counsellor at BGA. The positive effects of adopting such an approach are potentially compounded when the topic relates to prosocial processes and wellbeing. For example, using a co-production model of educational resource creation, Ott et al. (2017) demonstrated improvements in teacher resiliency and wellbeing when engaged through a PLC process. This

finding reinforces the benefits of qualitative engagement of educators to promote holistic social-emotional development and growth in schools.

Lewin's change model places human agency in the centre of the change process and understands behaviour as arising from the interactions of complex social beings from varying positionalities and perspectives within the organizational field. This understanding of intersubjectivity provides an important cultural lens to the social and cultural forces that influence change in organizations (Have et al., 2018; McCalman & Potter, 2015). In this way the model can assist change leadership in understanding and analyzing important change elements related to interpersonal dynamics and mindsets of individuals and groups at BGA.

Change Framework Limitations

The CATS framework is a descriptive, system-level model that suggests a simple, linear approach to change. Challenges inherent in adopting the model include a lack of prescriptive detail for change leaders to follow. Moreover, without a more comprehensive organizational analysis and lens, change leaders may have difficulty orienting the model to particular organizational conditions and realities. In particular, organizations, or groups and individuals within them, might not be prepared with the necessary cultural and organizational change readiness required at the initial unfreezing step of change, or with the model's emphasis on democratic participation and engagement. Finally, the framework is agnostic to dimensions of social justice and equity.

Integration of Trauma-Informed Social Justice Components

The bridging of SAMHSA's (2014) trauma-informed organizational principles and Lopez & Jean-Marie's (2021) anti-oppressive leadership development steps to the CATS organizational change framework serves to inform and imbue Lewin's long-standing organizational change framework, amenable to open-ended and holistic change, with anti-oppressive and trauma-informed approaches to structure complementary processes focused on socially just, curative principles, in addition to alignment with local conditions such as the leadership-focused vision for

change and identified principles guiding the vision. The following section articulates the essential tenets of each approach.

A Trauma-Informed Approach

SAMHSA's guidance for a trauma-informed approach to mental health service delivery has been influential in influencing systems, organizations, and individuals to craft effective support for persons suffering from trauma and trauma-related consequences. Central to the development of a trauma-informed approach is the understanding that the environment within which treatment is administered has significant influence over treatment effectiveness, which was previously underestimated in the literature (SAMHSA, 2014, p. 6).

The hallmark of a trauma-informed approach is connected to the understanding and presence of four key conditions or assumptions (SAMHSA, 2014, p. 9).

1. Realize: Systems, organizations, and program delivery are informed by an understanding of the pervasiveness of trauma and its effects on individuals, groups, organizations, and communities.
2. Recognize: Once understood, signs of trauma can be identified.
3. Respond: The organization, system, or program mobilizes resources to take action in a holistic manner and apply principles of a trauma-informed approach in all relevant areas.
4. Resist: In recognition of systemic and structural contributions to inequities and harm, an organization, system, or program resists re-traumatization through a focus on institutional factors that promote sustainable wellbeing and decrease potentially harmful practices.

Although all four assumptions of capacity for a trauma-informed approach may occur simultaneously, each build sequentially and serve as mutually reinforcing conditions. Their application to the organizational change framework allows for integration of best practices in mental health into the change process while also aligning to the leadership-focused vision for

change and principles guiding the change. Each assumption will be integrated and aligned with the CATS framework for leading the change process, as articulated in greater detail in Chapter 3 on change implementation.

Trauma and Social Justice

Researchers in the field of trauma-informed practices in education have long pointed to the field's theoretical complementarity with social justice applications (Blitz et al., 2020; Morgan et al., 2015; Thomas et al., 2019). Yet, at the same time, acknowledging the current gap between theory and practice, Gherardi et al. (2020) argue that contemporary application of trauma-informed policy and practice in schools, although paying lip service to social justice and equity, neglect underlying sociopolitical roots of oppression (p. 492). For example, the authors advance the argument that trauma-informed interventions are predominantly presented as decontextualized and apolitical; a common depiction that takes away from the structural and intersectional dimensions of trauma and inequity. Moreover, they also note that leading trauma-informed schooling models do not take into account SAMHSA's (2014) trauma-informed organizational characteristics that address social justice concerns, namely empowerment, voice, and choice, and cultural, historical, and gender issues. Lastly, the authors reject the school-centric approach to trauma-informed care that is common in the literature, as that approach fails to account for and mitigate the harmful effects of schooling itself as a source of alienation and trauma (p. 488).

Anti-Oppressive Action and the Organizational Change Framework

In order to address these larger social justice concerns, the CATS organizational change framework and trauma-informed approach will be aligned with Lopez and Jean-Marie's (2021) anti-oppressive practical strategies for educational leadership. Informed by critical race theory (CRT) (Capper, 2019), the approach assists educators to both conceptualize and enact anti-oppressive action with regard to diversity, equity, and inclusion. The researchers highlight the intersectionality of marginalized identities and call for a multidimensional approach rather than a reinforcement of an over-simplified, existing polarity common in popular discourse. As constructed, the framework

provides a necessary foundation to the change process model to embed equitable outcomes. The outlined approach has four steps that form the basis of continuing practice toward a culturally responsive and transformative organization.

1. Name: Critical consciousness is raised through a process of self-reflection and introspective awareness to recognize the oppressive manifestations of antiblackness and marginalization in schools. Educators “must examine their positionality, engage in self-reflection, and come to understand what they need to learn and unlearn.” (Lopez & Jean-Marie, 2021, p. 58).
2. Own: Educators place themselves in a position to examine their inter-subjectivity within the process of othering and that of the collective. They recognize their responsibility and identify potential actions to take.
3. Frame: Educators with intentionality and purpose take anti-oppressive action in areas including policy, curriculum, awareness raising, and systemic change. Trust is a necessary condition at this stage, and the engagement of marginalized community members and identities.
4. Sustain: Through collaborative mentorship, educators take on the role of mentor and become critical friends to promote further reflection and identify growth areas for personal and professional practice to further the journey aspects of change (Lopez & Jean-Marie, 2021, pp. 59-60).

Each step of the above process highlights the importance of individual self-awareness and critical consciousness to move towards equitable outcomes. Similar to the steps of a trauma-informed approach, insight and capacity development with regard to socially just outcomes may occur at any step with each component mutually reinforcing one another. Their application to the organizational change framework allows for integration of transformative praxis to the change process in alignment with the leadership-focused vision for change and principles guiding the change.

Organizational Change Readiness

The following section diagnoses and assesses organizational change readiness (OCR) with regard to BGA and the proposed change initiative. Using Lewin's force field analysis (Burnes, 2020) as a framework to contextualize relevant change drivers, OCR will be assessed with a focus on important micro-, meso-, and macro-level factors.

Organizational Change Readiness Overview

Shaped by local contexts, OCR is widely recognized as an influential precursor to change implementation success (Armenakis et al., 1993; Weiner et al., 2020) that is connected to organizational change capabilities and capacity (Mladenova, 2022; Montreuil, 2022). Defined as organizational members' shared commitment to implement change and their own collective self-efficacy belief in their capacity to carry out the desired change, OCR addresses psychological and behavioural factors that predispose individuals to either support, reject, or be indifferent to group goals and efforts toward desired change wherein "the content of change matters as much as the context of change" (Weiner, 2009, p. 3). Researchers hypothesize that the more change recipients in institutions are ready to change, achieving a state of support through a combination of characterological predispositions, attitudes toward change antecedents, and reactions to organizational change outcomes, the more the likelihood that an organization can effectively combine inputs, apply transformative processes, and achieve desired change adoption and success (Oreg et al., 2011). Although primarily conceptualized at the individual level, the state of OCR in institutions is a function of multi-level and multi-faceted processes and so can vary based on level of grouping in the organization from individual, group, and overall organizational readiness for change (Rafferty et al., 2013; Vakola, 2013; Weiner et al., 2020).

Important to conceptualizing the state of readiness within BGA to address the PoP, OCR relates to an organization's readiness to plan and implement a specific, discrete change initiative and, as such, is well suited for understanding preparedness for discontinuous change where transformations are being initiated within an organization at a particular point in time, rather than

representing a continuous state of preparedness or adaptive capacity (Mladenova, 2022, p. 9). In this way, and with regard to a Lewinian-inspired change process, overall OCR can be related usefully to Lewin's concept of unfreezing wherein attention is drawn to a gap between the current status quo and a preferable future state (Armenakis et al., 1993; Vakola, 2013). The extent to which BGA can destabilize existing mindsets and resistance to change around the PoP, the greater degree to which organizational readiness can be obtained.

Field Theory and Force Field Analysis

Field theory serves as the basis of Lewin's three-step model of change (Burnes, 2020, p. 35). According to Lewin, behaviour is a function of complex interactions between a change agent; i.e., individual, group, or organization, and their environment as they move toward desired goals. Rather than working in isolation, organizations and the individuals that work within them shape and are shaped by a complex array of dynamic forces that, taken together, comprise a gestalt or "live space" within which change occurs (Lewin, 1947). Understood from this perspective, goal attainment is rarely as simple as moving from A to B, but rather represents a dynamic and responsive interaction between change agent and environment within an organizational field, whose interplay with enabling and restraining forces creates a dynamic equilibrium or homeostasis. When these forces are in balance, behaviour is stable. When they are imbalanced, fluidity of change ensues (Burnes, 2020).

Particularly relevant to the unfreezing stage of Lewin's model, applications of force field analysis to relevant enabling and restraining forces affecting organizations and change agents allow for more holistic appraisals of potential change efficacy, strategy, and more nuanced assessments of OCR and salient change drivers. The following section situates relevant enabling and constraining forces within the context of BGA and the PoP with an eye to contextualizing planned discontinuous change and overall OCR.

Enabling Forces

The following section describes relevant positive forces that support organizational readiness for change to address the PoP.

Executive Support and Credible Leadership. There exist many driving forces at BGA that suggest possibilities for forward movement to address the PoP. First and foremost, important OCR conditions of executive support and credible leadership (Judge & Douglas, 2009) are strong with the board of trustees and head of school, as part of BGA's current strategic plan, signaling a priority over the next five years to have an increased focus on improving student mental health and wellbeing. This clarity of purpose and communication to stakeholders and the community indicates an important direction from the strategic apex of the organization and an institutional willingness to direct resources and political backing for enhancements to student services directly applicable to addressing the PoP. Furthermore, assisted via credible leadership, demonstrated macro-level institutional support creates salutary conditions for initial steps in the change process, such as establishing a sense of urgency, forming a guiding coalition, and crafting a compelling vision for change that can lessen follower resistance while heightening organizational change readiness (Kotter, 1995).

Cultural Capacity and Positive Experiences with Prior Change. Group readiness for change is a function of collective appraisals related to the necessity of change, collective self-efficacy judgements, evaluations of benefits of change to the group, and confidence in organization-wide capacity (Vakola, 2013, p. 99). Relevant to micro-level processes at BGA, an established culture of resourcefulness, self-efficacy, and ethos of distributed leadership represent key cultural competencies, stemming from collective agency, that enable strong organizational change capabilities. Frequent staff meetings, subject group level meetings, professional development days, and organizational structures such as the SST and SLT allow for frequent interaction and the development of collective self-efficacy and capacity. Additionally, positive experiences with prior change initiatives, such as the adoption of the UPP educational program, represent influential precursors to establishing individual and group change readiness that can facilitate knowledge mobilization and requisite cultural change around the PoP (Judge & Douglas, 2009; Schein & Schein, 2017). Moreover, since faculty are in frequent contact with and in close

proximity to students and families, they are able to more easily capture accurate and pressing student needs and realities around mental health and wellbeing. This bottom-up organizational feedback capacity enables student voice and feedback to influence the desired change process, heighten necessary cognitive dissonance and disconfirmation of the organizational status quo, and inform equitable dimensions of the change process (Dugan & Safir, 2021).

Trustworthy Leadership and Motivation. School leadership at BGA has fostered an environment and culture within which important occupational motivational and job satisfaction factors such as achievement, recognition, purpose, responsibility, and advancement (Herzberg, 1959) are intentionally fostered, highly valued, and publicly recognized. As pointed out by Ozdil et al. (2023), purposeful and intrinsically interesting work, combined with a duty of responsibility and achievement, is highly motivational in educational settings (p. 466). Relational trust and purpose-led connections foster increased individual readiness for change (By, 2021). Additionally, maintenance of positive workplace hygiene factors, such as salary, working conditions, and quality of supervisor–employee relationships (Cutler, 2014, p. 67) allow for employee needs to be met, evidenced by a low faculty and staff turnover ratio, and indicate important pre-change antecedents are favourable with regard to individual change readiness at BGA.

Organizational Life-Cycle Influences. Organizational growth is a major determinant of change requirements in institutions (Greiner, 1998). Over the past four years, BGA has targeted and experienced robust enrollment increases and faced resultant pressures to increase staffing levels, renew and expand current facilities, and plan for strategic change to accommodate scale changes. Importantly, with regard to the PoP, increasing student numbers has initiated a crisis of growth (Greiner, 1998, p. 62) requiring greater intra-organizational collaboration and attention to enhancing student services through increased specialization and professionalization. This institutional reality has precipitated greater management collaboration and the development of new horizontal structures conducive to increased information sharing, experiences of teamwork and mutuality, and more dynamic cross-pollination of people and ideas throughout the organization; all of which positively

influence important OCR variables such as change valence, collective self-efficacy, and greater openness to change (Judge & Douglas, 2009).

Institutional Isomorphisms. Lastly, enabling coercive, mimetic, and normative isomorphic forces, such as accreditation processes focused on holistic student development, best practices evidenced in colleague schools and networks related to student services, and field-wide professionalization of student mental health and wellbeing exert a degree of positive pressure on the PoP within BGA.

Constraining Forces

The following section describes relevant negative forces that detract from organizational readiness for change to address the PoP.

Lack of Awareness and Capacity. Constraining forces exert influence against desired change in organizations. As outlined in the framing of the PoP, a lack of institutional content knowledge and capacity at BGA represent a root cause of difficulty in responding to student mental health and wellbeing needs. Subsequent secondary effects arising from this organizational state result in further barriers to change since, without an established organizational ability to accurately diagnose and assess social-emotional and trauma-related student difficulties, signs and symptoms of student difficulties are missed or misattributed and diminish organizational change capacity around the PoP.

Stigma. A conservative parent and school culture influences, and has been influenced by, prevailing attitudes and negative stigma toward mental health. As Plazek (2012) outlines, conservative ideology serves to maintain the status quo and privileges institutions to reinforce established patterns of social and economic organization. Related to the PoP, this ethic frames social-emotional supports as secondary to the larger structure of achievement. Moreover, a conservative culture has been shown to perpetuate stigma around help-seeking behaviours and create barriers to accessing mental health services in schools (Gee et. al, 2021; Schomerus & Angermeyer, 2021).

Workload Intensification. Stress and burnout resulting from workload intensification inhibits educators from performing their duties (Lawrence et al., 2019). At BGA, faculty and staff have voiced concerns around increased workload related to expansion of responsibilities, tasks, and related demands on faculty and staff time as school enrolment has increased. Administration is also not immune from the constraining effects of increased workload as a result of scale increases and expansion of student needs (Hauseman, 2022). From a practical point of view, increased workplace and emotional demands on teachers and administrators at BGA represent a barrier to a planful approach to change at BGA.

Institutional Isomorphisms. Constraining coercive, mimetic, and normative isomorphic forces, outlined in Chapter 1, continue to impinge upon BGA's ability to address the PoP with competitive pressures such as market competition, parental expectations, and somewhat inflexible policy constraints and requirements of the UPP program exerting a degree of negative pressure on addressing the PoP within BGA.

Summary

As currently constituted, I surmise that enabling forces are greater than restraining forces at BGA related to the PoP, based upon the above factor analysis. See Appendix C for a visual representation of this assessment and relative weighting of both enabling and constraining forces.

Leadership Ethics in Organizational Change

The following section discusses relevant leadership ethics and ethical paradigms germane to exploring the PoP at BGA. Using ethical paradigms outlined in Shapiro & Stefkovich (2016), the ethics of justice, critique, care, and profession are framed within an overall ethical perspective to understand moral considerations, responsibilities, and commitments to varying organizational actors and stakeholders throughout a trauma-informed, social justice change process.

Leadership Ethics

Educational leadership is an inherently moral undertaking (Starratt, 2005). Leaders in the field do not go into the profession to achieve riches or fame, nor is it a career path given to instant

gratification or egoic self-aggrandizement. Rather, based upon humanistic values and an understanding of social and moral complexity, educational leaders influence the public good through principled and purposeful action (By, 2021; Kempster et al., 2011). Rather than occurring in a vacuum, ethics is a “dynamic and continuing activity” (Ehrich et al., 2015, p. 198), and as a result, clarity around moral imperatives and decision-making should guide leaders toward ensuring equitable and just processes and outcomes. Moreover, important to this endeavour, alignment between the ethical values of leaders and the change paradigms they pursue are critical to leadership effectiveness in organizations (Burnes & By, 2012). Advantages of values-based leadership to organizational change success are manifold with ethical leadership, change, and employee involvement found to be positive and mutually reinforcing in promoting greater employee performance outcomes with a strong relationship tied to perceived ethical leadership and employee job satisfaction, increased performance, and engaged citizenship behaviours (Sharif & Scandura, 2014, p. 192), with evidence suggesting that effective change management occurs when individual and group values and goals are aligned at all levels of an organization (Burnes & By, 2012).

Organizational Responsibilities and Ethical Commitments through Change

As articulated in the proposed integrated trauma-informed, social justice change framework and selected change leadership approaches, change processes and outcomes in this DiP are designed within an ethical lens congruent with a conception of trauma as both a socially-constructed, structurally composed, and subjectively experienced phenomenon. This understanding of trauma places relevant organizational responsibilities and commitments to stakeholders through change to be bound, both in process and outcome, to a considered, intentional praxis founded on organizational principles and outcomes articulated by SAMHSA (2014), as well as the outlined leadership-focused vision for change and change principles. The moral exigencies of a trauma-informed, social justice lens embedded within the proposed change framework necessitate an explicitly moral vision of a change process, outlined by the leadership-focused vision for change and change principles, that support equitable processes and outcomes.

Within this context, an ethical commitment to stakeholders such as students, parents, community, and adults working at BGA exists along with Lewinian-inspired change values of humanism, democratic participation, and group dynamics (Burnes, 2009).

Ethical Paradigms

The following section briefly discusses the role of relevant ethical paradigms in conceptualizing moral obligations and key questions related to the change process and relevant stakeholders.

Ethic of Care. The ethic of care "values people not principles" and is concerned with students and their holistic development, in addition to staff and adults in education (Wood & Hilton, 2012, p. 203). Care is of primary moral importance when conceptualizing obligations to stakeholders throughout a trauma-informed, socially just change process. Guided by values of caring, compassion, understanding, holism, and trust, all stakeholders would be placed at the centre of moral reasoning, whose care and wellbeing are considered central to change contexts and processes. Additionally, trauma-informed change principles, such as psychological safety, mutuality and peer support form integral aspects of a values-based approach that encompass the ethic of care. From this perspective, decision-makers are invited to step into situations to understand more fully the unique circumstances informing moral judgment, rather than stepping back and identifying objective overarching principles for action (Nicholson & Kurucz, 2019, p. 31). In this way, an established leadership ethic of care is also an essential component of the relational aspects of authentic leadership that comprise the selected change leadership approach.

Ethic of Justice. A moral imperative of justice recognizes that schooling is an inherently social process wherein young people and adults come together in community to shape and enact a just and beneficent society (Shapiro & Stefkovich, 2016). As it pertains to the foundations of the CATS model, an ethic of justice underlies important conceptualizations of change as a human-centered experience underpinning values of agency, participation, and learning. Lewin sought to reduce social conflict and, in particular, worked to infuse democratic values into all aspects of his

change processes, such as group dynamics and participatory processes to foster emancipatory outcomes (Burnes, 2009, p. 365). When understood from a larger societal perspective, the ethic of justice infuses BGA's moral purpose and leadership in supporting the change process in the PoP. This ethical conviction also should inform relationships with community members and partners to facilitate empowerment of all stakeholders.

Ethic of Critique. Considering positionality, power, and privilege, the ethic of critique centers marginalized stakeholders in the change process in order to account for and correct systemic inequities (Capper, 2019). When considered from this ethic, change agents would engage with differences and act to dismantle the notion of normal and the existent disempowering narratives in mental health discourse, since "safe space that fails to address structural and systemic issues, the macro as well as the micro, can ultimately be neither safe nor just" (Maxfield, 2019, p. 83). Addressing the PoP from this moral lens serves to examine oppressive discourses and structures, how those systems are reproduced at BGA, and to what extent they can be mitigated and redressed through the change process. Although SAMHSA's trauma-informed organizational principles (2014) include anti-oppressive elements, the decision to integrate Lopez & Jean Marie's anti-oppressive change framework (2021) into the process is an intentional act in keeping with the ethic of critique to explicitly center marginalized stakeholder concerns and incorporate and support structural dimensions of a trauma-informed approach inclusive of principles of voice, choice, and empowerment, along with cultural, historical, and gender issues. This position is justified through the lens of the ethic of critique as marginalized populations disproportionally experience equity-based systemic barriers to mental health care (Alvarez et al., 2022; Castro-Ramirez et al., 2021; Fante-Coleman & Jackson-Best, 2020).

Ethic of Profession. Situated within my own professional positionality and ethics as an educator, counsellor, and registered psychotherapist, moral conduct and decision-making are delineated within related ethical codes and standards of practice (Ontario Canadian Counselling and Psychotherapy Association, n.d.; College of Registered Psychotherapists of Ontario, n.d.;

Ontario College of Teachers, n.d.). Common elements pertain to ethical decision-making and an overall stance on moral sensitivity, reasoning, action, and reflection. The above ethical guidelines inform my own view and leadership within multi-professionalized teams and groups at BGA.

Ethics and Authentic, Distributed Leadership

The selected change leadership perspectives of authentic and distributed leadership overlap significantly with an ethical and moral conception of leading organizational change. AL's ethical frame and internalized moral approach to reasoning provides a strong ethical direction for change leadership in that it presupposes leaders adopt intentional ethical decision-making and moral reasoning, such as Anderson & Davies' six-step model (2000) or Tuana's moral literacy framework (2014), as a frame for a more expansive, inclusive viewpoint to assess moral obligations, relationships, and purpose. Both ethical and authentic leadership align with regard to individual leader attributes such as social motivation, balanced processing, and consideration of ethical consequences of leadership decisions. In addition, they both link perceived leader effectiveness to perceptions of honesty, integrity, and trustworthiness, and are characterized as honest, caring, and principled individuals who make fair and balanced decisions (Brown & Treviño, 2006, pp. 597-599). With regard to distributed leadership, although DL is a descriptive, rather than a prescriptive, theory (Harris, 2007, p. 317), participatory and distributed elements inherently prize collaboration, choice, and group learning that support empowerment and freedom, and promote equality and just change processes.

Strategies to Address the Problem of Practice

This section provides an overview of three potential interventions to address the PoP: a multi-tiered system of supports (MTSS), professional learning community (PLC), and positive psychology intervention (PPI), and presents a preferred strategy based on relevant theoretical and practical considerations. When considering the effectiveness of alternatives, all roads might lead to Rome, but, not all of them should lead one's army over the Alps or provoke hostile locals once at the gates of the city. In order to discern the suitability of each intervention to facilitate a trauma-

informed, socially just change process, attention will be given to assessment criteria regarding alignment with outlined change principles, guiding questions, agency, epistemology, feasibility, and potential impact and effectiveness.

Strategy Assessment Criteria and Key Questions

Change strategy evaluation will use a five-point Likert scale to measure strategy appropriateness and efficacy. See Table 1 below for an overview of selected assessment criteria and key questions to frame essential aspects of each criterion.

Table 1

Strategy Assessment Criteria and Key Questions

Assessment Criteria	Key Question(s)
Change Principles Alignment	How aligned is the proposed strategy with identified change principles of a trauma-informed, anti-oppressive approach?
Guiding Questions	How might the proposed strategy assist with investigating the guiding questions posed in Chapter 1? How effectively might the strategy be at accounting for and navigating relevant organizational structural, human resources, symbolic, and political frames to address the PoP?
Leadership Agency	Does the proposed strategy's change implementation process fit within my leadership agency at BGA?
Theoretical Alignment	Does the proposed strategy align with the broader leadership and epistemological researcher lens?
Feasibility	To what extent does BGA have the necessary inputs (i.e., resources, time, human resources) to implement the proposed strategy?
Potential Impact and Effectiveness	How effective is the proposed strategy at addressing identified gaps within the PoP?

Note. Assessment criteria and key questions were created by me to provide a more comprehensive, explicit framework for strategy analysis.

Strategies to Address the PoP

The following section presents a range of organizational strategies that address the PoP. A brief overview of each solution is provided, along with commentary around advantages and disadvantages of their adoption, in addition to assessing their ability to satisfy the assessment criteria.

Multi-Tiered System of Supports

Combining strategic tools from response to intervention (Shores & Bender, 2012) and positive behavioural interventions and supports (Center on PBIS, 2022), multi-tiered system of supports (MTSS) is an integrative, systemic approach to promoting positive student academic, social-emotional, and behavioural growth that, when implemented, has produced efficacious results across a wide range of schools and student populations (Goodman-Scott et al., 2023; McIntosh & Goodman, 2016). Guided proactively by student data, select cross-disciplinary teams monitor, assess, and implement evidence-based interventions to address comprehensive student learning, behavioural, and social-emotional needs. Noting similarities between MTSS and comprehensive school counselling programs, Ziomek-Daigle et al. (2016) highlight multiple advantages for school counsellors to introduce MTSS into existing school counselling programs, citing that MTSS integration increases collaborative school leadership and practice in promoting student success and wellbeing. Additionally, tiered approaches have been demonstrated to maximize school counselor time to address overall student wellbeing and also work with identified students requiring more specialized assistance, while also addressing equity in the classroom and closing achievement gaps. Lastly, use of student data and ongoing process monitoring raises program efficacy and awareness of the importance of guidance counsellors, along with increasing support for school counselling specifically (p. 227). With regard to the PoP and BGA, developing an MTSS holds numerous advantages. Most notably, the ability of an MTSS to deliver comprehensive structural, data-driven support to improve student mental health and wellbeing highlights a high degree of potential impact and effectiveness of the strategy. In addition, guiding questions related to existent organizational structural barriers and human resource constraints can

be well addressed as a result of requirements for increased professional development, staffing, and changes to organizational structures implied by the intervention.

At the same time as being potentially impactful on student experience, implementation of an MTSS holds potential drawbacks as a strategy to address the PoP. An epistemological lens of structural functionalism (Capper, 2019) may inadvertently reinforce a deficit model of student wellbeing, identifying and further marginalizing at-risk students, and as such, this approach is not in alignment with the selected leadership or researcher critical-interpretivist lens. Resource and structural requirements are significant, in addition to committing the organization to a long-term anticipated change timeline and requirement for significant coordination at each stage of implementation limits feasibility. Related to leadership agency, implementation of MTSS requires significant organizational collaboration and potential re-structuring of existing institutional relationships to facilitate more data-driven and multi-professionalized collaborative structures. At the time of writing, my leadership position within BGA does not currently allow for sufficient agency or necessary institutional buy-in to lead implementation of a school-wide MTSS. From a larger epistemological perspective, an MTSS involves a reductionist, school-centric stance on school improvement that does not account for social, cultural, technological, and economic influences, nor does it centre culturally responsive, trauma-informed approaches or holistic approaches to organizational wellbeing. For example, it would be a stretch, from my perspective, to understand and justify how an MTSS would be able to conceptualize and counteract re-traumatization of students who struggle within the rigidity of institutionalized schooling as presently formulated.

Professional Learning Communities

PLCs have demonstrated efficacy in supporting school staff professional development and improving student learning (Hipp et al., 2008; Katz & Earl, 2010; Stoll, 2015). Situated within a social constructivist conception of learning, PLCs place emphasis on collaborative teams of educators working together on identified thematic areas of practice, raising awareness and creating new knowledge from a shared meaning-making process and engagement (Wilhelm,

2016). Katz and Earl (2010) demonstrate that PLCs are most successful when they demonstrate purpose and focus on learning and enquiry, foster collaboration and positive relationships, and encourage leadership and build capacity.

Adoption of a PLC holds many potential benefits to the change process at BGA. For example, collaborative and team-learning approaches are particularly well suited to increasing awareness and expertise in the domain of mental health and wellbeing since exploration of the topic allows for acquisition of considerable subject knowledge in addition to elevated degrees of self-awareness, group relational skills, and improved collective teacher self-efficacy (Dudar et al., 2017). In this way, a PLC process aligns with the overall leadership and researcher epistemology. Increased knowledge about best practices with regard to mental health can have positive secondary effects on faculty in promoting teacher resiliency and positive collaboration with the school community as a whole. In this way, creating communities of practice around mental health and wellbeing can support teachers with new knowledge and, in accordance with self-determination theory, acts of involvement and dialogue can be curative in and of themselves (Deci & Ryan, 2008; Ott et al., 2017). The method's humanist and holistic approach is compatible with important change process characteristics inclusive of democratic participation and group processes (Burnes, 2009) in addition to important characteristics of a trauma-informed approach to change, such as psychological safety, trust, mutuality, and peer support (SAMHSA, 2014). Although not explicitly anti-oppressive by design, culturally responsive, trauma-informed leadership and practices can be intentionally crafted into the intervention to address equity-related dimensions of change (Capper, 2019).

The collaborative basis of a PLC can further enhance current organizational strengths at BGA. For example, the school's established culture of distributed leadership along with positive group-level factors related to OCR work well to enhance the unfreezing stage of change implementation. BGA's existing practices of team-teaching, frequent departmental group collaboration, and interdepartmental and grade level collaboration reinforce an engaged faculty

culture, group cohesiveness, and positive social norms that facilitate effective group processes and collective self-efficacy demonstrated to enhance performance of a PLC (Wilhelm, 2016). Additionally, involved middle management and a strong culture of institutional accountability and resourcefulness create adventitious conditions for PLC adoption.

With regard to leadership, facilitation of a school-wide PLC process is within my current scope for agency. In my capacity as head of guidance, I am responsible for presenting confidential updates and instructing faculty on social-emotional best practices and specific topics relating to student performance and wellbeing on a regular basis and am viewed as a content expert with institutional backing. Further, my informal status as content expert with regard to mental health and wellbeing stems also from my professional expertise as a mental health professional outside of the education setting in touch with multiple stakeholders and knowledge brokers in the mental health field. Viewed together my formal and informal position within BGA allows for scope for leadership both as facilitator of a group process and also content expert within the domain of student mental health and wellbeing. Lastly, implementation of a PLC involves a moderate amount of resources, i.e. release time of participating faculty and staff, materials, and investment in external supports as required, a state which reflects favourably upon the strategy's change implementation feasibility.

Positive Psychology Intervention

Based on a theoretical orientation of positive psychology (Seligman, 2018), a PPI creates structured school activities in which students are encouraged to generate direct experiences and reflect upon the role of positive emotional states and traits. Thematic areas of focus of PPIs commonly include mindfulness, compassion, gratitude, positive relationships, and emotional intelligence. An emerging research base attests to the efficacy of PPIs on youth mental health outcomes (Chuecas et al., 2022; Suldo, 2016; Tejada-Gallardo et al., 2020). Although successful implementation of PPIs can require considerable commitment from school administrators and classroom teachers, researchers note the continued efficacy of brief interventions that require much more modest investments of resources (Shankland & Rosset, 2017).

The current school environment at BGA would be conducive to the initiation of a PPI because organizational structures exist for supportive adult/student interactions and relationship-building in the form of a developed teacher–advisor program (TAG) and scheduled classroom time for standalone guidance social-emotional program instruction for Grades 7, 8, 9 and 10 respectively. As such, there exist few structural, cultural, human resource, or political barriers to adoption and so can address guiding questions posed in this DiP without significant disruption to current operations. Although teacher professional development would be a prerequisite for program implementation, current organizational structures can be utilized to support a PPI with minimal changes to school practices and resource requirements. As a short-term intervention that can be implemented within given organizational structures, scope for leadership is contained and limited. When considering my own leadership agency and positionality within BGA, a PPI is completely within my current scope and capacity to lead without requiring new duties or responsibilities and, viewed in this way, represents an achievable initiative within the current micro- and meso-level structures of the organization.

At the same time, certain limitations of a PPI should be considered. Given the brief nature of the intervention and role of faculty as implementers of change, overall organizational cultural mindsets and ways of thinking will not be challenged or de-centered in a fashion that is required to initiate culture change, involving new learning, transformative processes, and new ways of seeing things (McCalman & Potter, 2015, p. 22), requisite for a trauma-informed and socially just process. In this way, a PPI might represent too superficial of an intervention to address more central elements of the PoP when conceptualized from a culturalist perspective and so limit potential effectiveness and impact of the intervention. A PPI is likely a necessary outcome, but insufficient input, into a trauma-informed, socially just change process.

Strategy Assessment and Conclusion

The following section presents an overall assessment of findings derived from the strategies section analysis along with a brief discussion of key conclusions. See Table 2 below for a summary of overall findings.

Table 2

Summary Assessment Table of Strategies to Address the Problem of Practice

Assessment Criteria	MTSS	PLC	PPI
Change Principles Alignment	2	5	3
Guiding Questions	4	5	3
Leadership Agency	2	3	5
Theoretical Alignment	2	5	3
Feasibility	1	3	5
Potential Impact and Effectiveness	4	4	2
Total Score	15/30	25/30	21/30

Note. Overall scores are derived from my own assessment of strategy/criterion fit with numerical values ranging from: 1 “Poor” to 5 “Excellent”.

Discussion

Essential to this proposal is the belief that an integrated, holistic, and participative approach to organizational change is justified given the complex, multi-dimensional nature of mental health and wellbeing (Lewis, 2020; Siegel, 2020), the reflexive and iterative nature of organizational change and learning (Argyris & Schön, 1997; Houchens & Keedy, 2009), and the ethical imperative to account for and deconstruct dominant discourses through socially just (Gamby et al., 2021) and trauma-informed perspectives (Brandell & Ringel, 2019; Chafouleas et al., 2021). Constraining a path forward is

understanding how to influence current structures, mindsets, and culture in order to build organizational coherence to promote positive change factors and drivers such as intrinsic motivation, continuous improvement, collective capacity, and reflective action (Fullan, 2016; Schein & Schein, 2017). Important in that pursuit is considering the affective domains of individuals, since culture change requires risk-taking and a break from past practices (Fullan, 2016, p. 39). School-based mental health initiatives that address the PoP, whether MTSS, PLC, or PPI, require fostering a collaborative learning culture that prizes curiosity, use of data, and individual and group responsibility and accountability. With regard to my professional positionality, school counsellors and leaders must work with multiple groups, both internal and external to the school, to facilitate widespread collaboration and teamwork. Additionally, stakeholder needs and implementation challenges must be addressed throughout the planning and execution phases of the proposed change process.

To facilitate these needs, the creation of a PLC represents the most appropriate solution to the PoP, as it most closely aligns with the epistemological, practical, and leadership aspects important for organizational change and represented in the assessment criteria. As previously discussed in this DiP, the highly collaborative, relational, and multi-disciplinary requirements of program implementation around improving student wellbeing further support the formation of a PLC. The advantages of a PLC include its epistemological alignment with existing research on promotion of wellbeing in organizations (Ott et al., 2017), its ability to foster a holistic, collaborative stance with regard to learning, while also encouraging a distributed approach to leadership that enhances both my scope and agency, and, finally, its moderate requirement for resources and time. Lastly, in accordance with social constructivist principles of meaning-making and co-construction of knowledge and learning, adopting a PLC provides organizational expression of my interpretivist and critically informed leadership and researcher positionalities. A process-experiential approach, aligned with Lewin's CATS change model, can form a critical connective

stance that assists with the potential difficulties of enacting change on an organizational level and broadens change leadership to include culturally responsive approaches.

Summary

Chapter 2 focused on laying a theoretical and practical foundation for change leadership and strategy implementation related to the PoP at BGA. Using Lewin's force field analysis, OCR was established contextualizing and assessing salient internal and external change drivers. Enabling forces were judged to be stronger than constraining forces, producing a dynamic state of readiness towards addressing the PoP. Further, framing educational leadership as an inherently moral task, the chapter examined relevant ethical leadership perspectives and paradigms in order to explicate important epistemological and axiological aspects of the proposed change process in keeping with ethical paradigms and commitments to organizational stakeholders. In particular, attention was given to alignment between trauma-informed, social justice approaches, selected leadership change frameworks, and local contexts and conditions. As a final component to the chapter, potential strategies to address the PoP were discussed and assessed based upon selected criteria, with a PLC on student mental health and wellbeing deemed to best fit the overall context and needs of BGA.

Chapter 3: Implementation, Communication, and Evaluation

In their discussion of how schools can transform into learning organizations, Stoll & Kools (2017) remind readers that "Teachers and school leaders need help. They need the right conditions and support to make this transformation" (p.13). Having taken time to establish the essential aspects of context and change planning at BGA in the previous chapters, attention in Chapter 3 turns to setting in motion those particular “right conditions and support” to the question of practical implementation related to change management, communication, and assessment. Utilizing insights gained around organizational change readiness, ethical issues, and proposed strategies to address the PoP in Chapter 2, Chapter 3 presents the selected change solution and articulates an implementation plan, inclusive of communication and evaluation components, that is informed by selected leadership approaches, the leadership-focused vision for change, and trauma-informed principles guiding the vision (SAMHSA, 2014). The current chapter situates implementation, evaluation, and knowledge mobilization (KMb) activities within a systems perspective (Hawe et al., 2009; Mosher et al., 2014; Senge et al., 2019) and positions KMb as a collaborative and generative process that is central to supporting desired relational and normative restructuring at BGA over time. Although implementation, communication, and evaluation considerations are presented sequentially, these three aspects of the change plan are holistically connected to all aspects of intervention delivery and are conceptualized as multi-layered, interconnected components within the change process. Similarly, from an overarching editorial view, this chapter’s content is shaped by and will highlight aspects of guiding questions around organizational structures, stakeholder engagement, and constraints posed in Chapter 1.

Change Implementation Plan

The following section presents an overview of implementation priorities and considerations related to change planning, focusing on four main areas: (a) strategic alignment; (b) stakeholder engagement; (c) organizational learning; and (d) participant motivation through the change. Integrating priorities and guiding questions identified in Chapter 1, this section articulates and

problematizes the adoption of a participatory change implementation framework (Russ, 2010) in keeping with an ADL perspective and Lewinian-inspired CATS change process.

Strategic Alignment

First and foremost, the overall change implementation framework must be in alignment with both desired outcomes and principles guiding the change outlined in Chapter 2, namely: psychological safety; trust; mutuality and peer support; collaboration; empowerment, voice and choice; and culture, historical, and gender issues (SAMHSA, 2014), in order for the selected strategy to effectively engage, orient, and motivate collective action at BGA to address the PoP and account for guiding questions posed in Chapter 1. In specific, the leadership-focused vision for change serves both motivating and orienting functions for change participants and stakeholders in providing a clear and compelling gap between current practices and a desired future state (Kotter, 1995; Stoll & Kools, 2017), prompting cognitive dissonance around the dissatisfactory nature of the status quo (Malhotra & Shotts, 2022), and as such positively influences the direction of change in addition to fostering commitment through linking purpose-related elements of the intervention to individual and group efforts (By, 2021, p. 97). For example, when individuals at BGA learn about the pervasiveness and deleterious consequences of trauma on student learning and wellbeing, they will more easily perceive gaps in current practices and take action towards more responsive approaches aligned with desired changes. In this way, the teacher who, going beyond the superficial, asks about what might be going on in a student's life to understand root causes of their recent misbehaviour is more likely to be engaged and intrinsically motivated to support group efforts.

Moreover, congruence between means and ends throughout the change process is in alignment with the inherently moral perspectives of both the values and vision of the change, as well as the selected ADL and ethical leadership perspective and paradigms outlined in Chapter 2. For example, adherence to the paradigms of justice, critique, care, and profession (Shapiro & Stefkovich, 2016) demand the creation of processes, activity settings, and procedures that are

holistic and sustainable and account for both relational processes and historic and systemic injustices (SAMHSA, 2014). Additionally, values-based change has been demonstrated to significantly contribute to overall change adoption and success within organizations, and so materially bolsters the current change effort toward desired ends. When change participants can see themselves as being aligned with both desired change outcomes and processes, positive states associated with increased organizational change readiness such as intrinsic motivation, change commitment, and enthusiasm, are more likely to occur and assist with overall change efforts (Burnes & Jackson, 2011).

In accordance with neo-institutional theory, the creation and execution of an effective implementation and communication plan is in large part determined by how change leaders can engage stakeholders in the need for change by aligning desired end-states and key concepts to currently held dominant institutional logic, or introduce new institutions by embedding them in current discourses so they will be more readily adopted by others within the organization (Krautzberger et al., 2021, p. 669). Weaving the change process into current culture and structures more readily anchors new practices within organizational processes and beliefs. Trauma-informed, socially just participatory practices introduced within the proposed change implementation process will be strategically aligned to BGA's specific mission, vision, and values, along with the more diffuse cultural narrative and logic of academic excellence, with the aim to promote increased stakeholder acceptance of novel structures and processes, normative and relational restructuring, and organizational resource allocation, and as a result, increase the likelihood of adoption of the change initiative's underlying discourse into BGA's dominant institutional logic.

Moreover, strategically positioned under the umbrella of BGA's strategic plan, intervention components and goals will be tied to existing organizational time-bound and highly prioritized accountabilities such as individual faculty and staff professional development goals alongside anticipated strategic plan deliverables such as the creation of innovative programs, increased support for student wellbeing, and changes in practices that promote institutional sustainability.

More specifically, with regard to trauma-informed practices, identified goals and practical changes can include introduction of school-wide behavioural and discipline policies and procedures based upon more restorative models (Thorsborne & Vinegrad, 2022), development of more holistic and inclusive classroom instruction and management practices (Freire, 2018), and the adoption of empowering participatory and collaborative professional learning methods (Stoll & Kools, 2017), that will further BGA strategic plan pillars of improving organizational sustainability, innovation, and fostering inclusive and equitable organizational space. Components of the PLC will be coupled to BGA's existing professional development model, policies, and practices; a change implementation design feature that will facilitate KMb functions while also promoting a culture of inquiry and learning conducive to further sustainable institutional growth and development (Stoll & Kools, 2017) and in this way, change implementation will synergize organizational resource use and focus. Further, process and outcome alignment throughout the change process fosters clarity around implementation logic and important related factors such as program coherence (Chapman-Novakofski, 2019), normative (practical changes regarding behaviour) and relational (social networks and groupings) restructuring, resultant from collective action and participation (May et al., 2016), and clarity, transparency, and trust in leadership demonstrated to lower stakeholder resistance to change and increase innovation adoption (Erwin & Garman, 2010). Lastly, intervention alignment is also congruent with the essential principles of an ADL approach such as balanced processing, transparency, and authenticity, along with a team-based approach to change (Duignan, 2014; Harris, 2009).

Stakeholder Engagement

Implementation effectiveness in education is heavily influenced by the degree to which leadership can facilitate stakeholder participation and engagement throughout the life of an intervention (Dudar et al., 2017). Similarly, as discussed in the guiding questions section of Chapter 1, stakeholder engagement is viewed as an essential element of implementation success at BGA. To this end, employing strategies that foster inquiry, effort, persistence, and

experimentation, represents a key implementation success factor that can have an important magnifying effect on the development of collective self-efficacy and stakeholder engagement that anchor central elements of successful PLC processes (Donohoo & Katz, 2019; Voelkel & Chrispeels, 2017). Leaders using participatory change implementation frameworks encourage stakeholders to be actively involved in shaping both the nature and scope of the change, as well as the implementation processes, with anticipated benefits of adoption including: increased participant ownership of change and implementation processes, empowerment, and collective self-efficacy; greater perceptions of organizational equality and justice; and, a resultant "delayering of formal organizational structures" (Russ, 2010, p. 776) in keeping with the leadership-focused vision and values of the change (SAMHSA, 2014) in addition to an ADL perspective.

Although aligned to BGA's strategic plan implementation and professional learning framework, PLC processes and components, specific to enacting trauma-informed practices, will be loosely coupled to existing structures to allow for increased discretion of resource use and application to local contexts (Hawe et al., 2009, p. 6) in addition to leveraging normative and relational restructuring to facilitate participatory processes aligned with KMb activities. Relevant to the monitoring and evaluation plan, process monitoring throughout the duration of the change initiative will be emphasized to assess project deliverables and generalizability of results.

Organizational Learning and Knowledge Mobilization

A wide consensus exists in the educational literature of the imperative that schools must become increasingly responsive to social changes and adopt flexible approaches to complexity (Hawe et al., 2009; Stoll & Kools, 2017). Within schools, this state of connectivity with the external environment amplifies the need to move beyond student test scores as sole indicators of success to managing and accounting for potentially ambiguous outputs such as enabling individual and organizational wellbeing (Fry et al., 2023). Adopting a participatory change framework and PLC model of intervention delivery serves to deepen connections to stakeholders' lived experience and fosters more authentic and direct connections to the external environment. This feature of the

change implementation process reinforces an ADL perspective, provides a clear approach to addressing potential cultural barriers posited in the guiding questions section of Chapter 1, and allows for greater change adaptability, flexibility, validity, and promotes holistic engagement with important external stakeholders.

Concomitant with this imperative, creating a school as a learning organization requires leadership to foster processes; i.e., collaboration, inquiry, risk-taking, and peer support, that encourage learning at individual, group, and overall organization levels. Core leadership practices related to knowledge creation and mobilization include setting direction, supporting professional learning, restructuring environments for learning, and building collaborative cultures (Reid, 2014, p. 336). Embedded throughout Chapter 3 is a holistic, multi-directional stance on organizational learning wherein new activity settings created through the change implementation process recognize and value the embeddedness of relational space for stakeholders to come together to learn both “about” and “with” each other to foster multiple ways of knowing (Skipper & Pepler, 2021). PLC participants will be drawn from all levels and roles within the organization and as a result create an overlapping social network that spans multiple functional areas of BGA. This thickening of social ties will foster increased peer mutuality and support, psychological safety, and positive emotion with regard to the change initiative and BGA overall. Additionally, with regard to wellbeing, collaborative, exploratory practices have been shown to be curative in and of themselves, and so will be prized within change implementation (Ott et al., 2017).

At the same time, understood from an anti-oppressive lens, KMb represents socio-political activity reflective of social heterogeneity, power differentials, and inequities (Abma et al., 2017). Activity settings created through change implementation represent locations within BGA that serve as internal organizational sites of contestation and negotiation wherein anti-oppressive practices can correct epistemic injustices such as hermeneutic injustice, when people are not given the right to interpret their own experiences (Abma et al., 2017, p. 492). Throughout Chapter 3, and specifically within the context of the KMb plan, relational and anti-oppressive components will be

accounted for using participatory methods and be guided by a strategic KMb framework that accounts for important participatory and socially just processes (Mosher et al., 2014) and answers important questions posed in Chapter 1 surrounding cultural and institutional barriers.

Motivation and Change

Although the widely cited statistic that 70% of planned change initiatives in organizations are unsuccessful has been questioned (Hughes, 2011), the body of evidence and amount of attention given to change success factors belies the difficulty and complexity with which leaders must contend to design and execute successful change in contemporary settings. Recognizing that without necessary energy and motivation, change efforts can fall prey to myriad difficulties despite how worthwhile the end goals of change might be (Erwin & Garman, 2010), central to the current change implementation process at BGA is an emphasis on important motivational factors and their underlying psychological correlates to shift the balance in favour of change implementation success (McLaren et al., 2023).

Within the current plan, intrinsic motivation factors of competence, autonomy, and social integration, based upon self-determination theory (SDT) of motivation (Deci & Ryan, 2008), will be embedded throughout the change process to promote and sustain high levels of organizational change readiness and goal-directed behaviour. Further to the selected change model, Chapter 2's force field analysis will be extended to target and explicate varying motivational processes over each distinct phase of change to focus specifically on intra- and inter-personal psychological processes germane to encouraging task initiation and persistence through change. For example, strategies will be pursued that focus on the presence and desirability of positive traits and states such as, identifying strengths and desired outcomes, focusing on positive coping and solution-building, in addition to exception finding and scaling questions to identify presence of and strategies to build towards desired changes (Murphy, 2015). Lastly, motivational interviewing techniques (Vansteenkiste & Sheldon, 2006), will complement SDT in implementation of capacity-building components of specific aspects of the KMb plan. For example, elements such as group

workshop norms, activity protocols, and the construction of KMb worksheets will integrate question prompts to elicit participant reflections around autonomy, mastery, and relatedness (Deci & Ryan, 2008). Addressed in this manner, best practices around change and motivation will be reflected in all aspects of implementation planning and so directly address the guiding question on stakeholder engagement posed in Chapter 1.

Change Steps and Implementation Considerations

The following section discusses each step of the implementation process in turn, with corresponding roles and responsibilities, goals, evaluation strategy, and KMb considerations. Overall goals for implementation are in part based upon short-, medium-, and long-term goals from findings of the Trauma and Learning Policy Initiative's (TLPI) inquiry-based process noting increased faculty empowerment and collaboration, integration of whole-child approaches into classroom instruction, affirmation of cultural identities and sense of belonging, and modification of behavioural policies to more reflect relational accountability and pro-social behaviours after implementation of trauma-informed practices at three U.S. high schools (Atallah et al., 2023, p. 3). Each change implementation step is presented with an initial summary table along with discussion to orient the reader to main elements and delve more sensibly into implementation details and rationale. See Appendix D for an overview of each stage of implementation along with highlighted features of implementation, communication, and evaluation frameworks respectively.

Step 1 –Unfreezing (Realize/Name)

At the conclusion of the first step of the unfreezing process, change participants at BGA will be able to realize the pervasiveness of trauma and its effects on individuals, groups, and societies, and will have initiated self-reflection activities to promote the development of individual and collective critical consciousness (Lopez & Jean-Marie, 2021; SAMHSA, 2014). Important strategic goals include the development of organizational shared understanding of trauma and its effects, increased openness to cultural change, and generating stakeholder buy-in, curiosity, and initial trust and teamwork along with increased community awareness around the PLC process through

KMb activities. See Appendix E for a brief summary of main roles, responsibilities, and outcomes, along with KMb and evaluation considerations.

Discussion

At the outset of the change initiative, with essential implementation details consolidated and approved by the head of school, a vision for change and plan steps will be outlined to senior leadership and the guidance department by the PLC coordinator. This grouping of faculty and staff will form the initiative's steering committee (e.g. PLC leadership team) representing a guiding coalition in the change process to leverage authority to legitimate the change through existent structures and expertise. The PLC coordinator, informed by an ADL stance, will facilitate knowledge acquisition and capacity building through intentional team building activities and psychoeducation around a trauma-informed approach (SAMHSA, 2014) to promote psychological safety and collaborative processes through establishment of shared expectations and meaning, inclusion, and orientation towards continuous learning (Edmondson, 2019), in addition to preparing and delivering materials developed in consultation with external resources (Attalah et al., 2023; Choudhury, 2021; Lindsey, 2019; Welborn et al., 2022) and formulating preliminary IC maps for program evaluation purposes (Hall & Hord, 2020, p. 91). Throughout the implementation process, I will serve in the capacity as PLC coordinator and as a result, can facilitate an overall strategic function in addition to engaging with and documenting the process. This leadership position reflects an ADL perspective and also exists within my scope for agency at BGA.

Once established, the PLC leadership team, guided by the PLC coordinator, will collaboratively plan and execute an initial launch event comprised of an information session hosted for all faculty and along with small group breakout sessions to further allow for stakeholder engagement and voice. KMb and evaluation considerations will take the form of the delivery of an internal stakeholder change readiness survey, and an open-ended solicitation of questions and concerns in order to communicate a compelling vision for change (Mariama-Arthur, 2018), de-

mystify a trauma-informed, socially just approach (Lopez & Jean-Marie, 2021; SAMHSA, 2014), and foster approach motivation, an individual's desire to achieve a positive or desired state (McLaren et al., 2023, p. 98), toward the change. The internal stakeholder survey will be designed to capture both qualitative and quantitative data around the change, such as assessing faculty and staff mindsets, priorities, and overall organizational change readiness (Judge & Douglas, 2009; Oreg et al., 2011; Rafferty et al., 2013; Vakola, 2013; Weiner et al., 2020), in addition to assessing internal stakeholder preliminary goals and further establishing institutional buy-in and support. With regard to guiding questions posed around required structures, staff and faculty will further be provided with program details and anticipated timeliness, along with an explanation of how the PLC process will be framed within BGA's professional learning model and structures to highlight program alignment and coherence including synchronicity with professional goals, timelines for participation, and key expectations for inclusion into the PLC participant group.

Following the initial introductory session, small group breakout discussions, led by members of the PLC leadership team, will be conducted with staff and faculty to leverage participatory processes to foster engagement, dialogue, trust and psychological safety (Edmondson, 2019). Influenced by the necessity to engage stakeholders as emphasized in Chapter 1, attention will be paid to process transparency and open communication to maximize engagement and trust in the process and leadership (Harden et al., 2020) in recognition of the presence of a diversity of stakeholder perspectives and positionalities. For example, sessions will incorporate solution-focused techniques and SDT to garner engagement and create a non-judgmental climate in addition to facilitating introspective awareness and self-reflection important in the unlearning and learning process of understanding positionality, privilege, and systemic oppression (Lopez & Jean-Marie, 2021; Shah, 2017). Data generated from the launch event will be reviewed by the PLC coordinator and shared with the PLC leadership team to identify internal stakeholder volunteers for PLC participation, with attention paid to group composition to be as representative as possible of the larger BGA community. At BGA there exists a strong faculty

culture and history of collaborative faculty professional development with frequent PD days and faculty and staff involvement in full-school improvements. As such, utilizing self-identified volunteers from faculty and staff is aligned within the cultural milieu of BGA, with these collaborators serving as PLC participants throughout the duration of the change initiative. Communication materials will be drafted and sent to all stakeholders and feedback evaluated to assess and adjust next steps in the process.

Additionally, together with the PLC coordinator, members of the PLC leadership team will conduct a gap analysis of current organizational data with regard to equity practices (Dugan & Shafir, 2021; Khalifa et al., 2016) as part of a systemic analysis of school data and relevant research. To this end, a modified version of the Authoritative School Climate Survey (Cornell & Huang, 2016; Konold et al., 2014) will be used as well as small internal stakeholder focus groups (Wang & Degol, 2016). Guiding resources for PLC implementation will be reviewed and selected for best fit within the proposed integrated trauma-informed, anti-oppressive change model (Choudhury, 2021; Lindsey, 2019; Welborn et al., 2022). As part of the KMb framework, results of the survey, gap analysis, and literature review will be shared with faculty and staff at a staff meeting and presented to internal and external community through a variety of media channels to further raise awareness around the initiative, in addition to addressing stakeholder concerns about the process.

Assessment of organizational readiness for moving to the next phase of the unfreezing process includes: the assessed degree to which the realization of the pervasiveness of trauma has been identified within existing structures, processes, and systems on the individual, group, and organizational level (SAMHSA, 2014) in addition to assessed level of qualitative engagement within identified anti-oppressive and critical consciousness-related reflexive practices (Lopez & Jean-Marie, 2021; Shah, 2017); the degree to which evidence of collective self-efficacy development and participatory processes in keeping with the leadership-focused vision and values within the PLC leadership team have been attained; selection of PLC participants; and the

successful completion and execution of the preliminary steps of the change implementation communication and evaluation plans. This first step in the change process is estimated to take seven to eight months.

Step 2 – Unfreezing (Recognize/Own)

At the conclusion of the second step of the unfreezing process, change participants at BGA will be able to recognize the signs of trauma within groups, individuals, and societies, and will through self-reflection, recognize and identify actions to take to promote anti-oppressive change (Lopez & Jean-Marie, 2021; SAMHSA, 2014). See Appendix F for a brief summary of main roles, responsibilities, and outcomes, along with KMb and evaluation considerations.

Discussion

Having established the PLC leadership team and identified participants for the PLC process, the next phase of implementation focuses on preparation for and engagement with the first iterations of PLC cycles. PLC group sessions will use a modified learning conversation protocol, a 7-step dialogue facilitation method, as a framework for session delivery to enhance collaboration and professional learning through promoting reflexive practices, increased tolerance of discomfort, and purpose-led thinking (Katz & Dack, 2016). PLC cycles will be facilitated by members of the PLC leadership team, identified as discussion leader(s), in collaboration with the PLC coordinator and will be planned to foster trauma-informed psychoeducation within empowering, participatory group processes. Topics such as causes, signs and symptoms, effects, and impacts of trauma within individuals, groups, organizations, and systems will be explored to further deepen participant awareness and knowledge around the complexity and interrelationships of trauma-related factors and also to foster commitment to action to ameliorate and resist the negative impacts of trauma (Attalah et al., 2023).

Internal participant needs for capacity building will be prioritized in the establishment of relational safety and consolidation of group norms (Bonebright, 2010) to foster a culture of peer

support, mutuality, and collaborative practices in alignment with a trauma-informed praxis (SAMHSA, 2014) and guiding questions posed in Chapter 1. Tools emphasized include purposeful agenda setting, generative questioning, and time for individual and group reflection that, together with trauma-related content exploration, will allow for the development of a group culture supportive of collective processes and trust concomitant with shifts in thinking and perspective necessary for the development of a more expansive view of collective action that includes critical consciousness and empowerment (Mosher et al., 2014). Further to group norms and expectations, attention to both cognitive and affective dimensions of engagement will be prioritized through process facilitation that emphasizes the development of individual autonomy, mastery, and relatedness (Deci & Ryan, 2008). For example, facilitation fostering openness, curiosity, and the creation of safe and brave spaces to explore topics such as individual and group identities, understanding bias and intersectionality, along with other holistic ways of being will elicit both cognitive and affective participation to create a transformative learning culture (Reid, 2014). Designed in this way, the PLC process will align with an ADL perspective, engage with guiding questions posed in Chapter 1, and foster participatory, psychologically safe, relational space to develop a culture conducive to individual and group risk-taking within an environment that prizes "recognizing and valuing multiple ways of knowing" (Skipper & Pepler, 2021, p. 590).

Together with identified discussion leader(s) for each session, the PLC coordinator will collect data from the conversations using the protocol (Katz & Dack, 2016) to document learning, evaluate progress against identified objectives created from the initial phase of the process, for example, evidence of changed practices relative to initial IC maps, and assess participant concerns, capacity development, and degrees of adoption of a trauma-informed lens (Hall & Hord, 2020). Additionally, individual learning reflections will serve to fulfill BGA's professional development framework goals for PLC participants, guide individual learning and growth, and support strategic alignment of the initiative. Opportunities for the PLC coordinator to review participant feedback and dialogue with participants, both in group and individually, will further

support capacity development and authentic opportunities to demonstrate guiding values of the change and an ADL perspective.

Assessment of organizational readiness for moving to the motion or change step of the process includes: assessment of the extent and degree to which the recognition of the signs and symptoms of trauma have been identified within existing structures, processes, and systems on an individual, group, and organizational level; presence and degree of psychological safety and relational trust within the PLC participants; degree of execution of the communication plan to build internal capacity and communicate to external stakeholders; and completion of the first round(s) of PLC groups with processing of feedback gathered and completion of the KMb framework questions (Ward, 2017) to guide next steps. This second step will occur over an estimated four to six months of the change implementation process.

Step 3 – Motion or Change (Respond/Frame)

At the conclusion of the third step of the change process, PLC participants at BGA will be able to respond to signs and evidence of trauma-related policies, practices, and stakeholder realities, and act in areas around policy, curriculum, and organizational practices to promote systemic change (Lopez & Jean-Marie, 2021; SAMHSA, 2014). See Appendix G for a brief summary of main roles, responsibilities, and outcomes, along with KMb and evaluation considerations.

Discussion

Having completed the unfreezing process, PLC participants and members of the PLC leadership team actualize and evidence KMb activities throughout BGA via interactions with both internal and external stakeholders. Addressing the KMb plan framework, guiding questions around the purpose, methods, agents, audiences, and anticipated effects of KMb activities will be pursued with the intention of responding and framing trauma-informed, socially just action within BGA, acknowledging and leveraging participant professional and personal positionalities. At this step

PLC participants have been able to grow personally and professionally through their engagement in the process and, with increased understanding and capacity, enact trauma-sensitive desired changes within their own zones of influence at BGA. As described earlier, examples of changes in mindset and practice include classroom teachers integrating best-practices for fostering prosocial classroom culture and holistic methods of instruction (Borden, 2019; Morgan et al., 2022), school administrators revising discipline policies and practices towards greater use of relational accountability and restorative justice (Thorsborne & Vinegrad, 2022), and at a very simple level, more frequent and supportive dialogue and peer exchange across functions and levels within the school creating a faculty and staff culture of openness, positivity, voice, and empowerment (Zepeda et al., 2022). Conceptualized in this way, use of trauma-informed and anti-oppressive tools will allow for all participants and stakeholders within the community to “learn, benefit from, and, in some manner, use the knowledge of others” (Mosher et al., 2014, p. 6).

Monitoring and evaluation considerations at this step include a focus on gathering change feedback from interactions of PLC participants and the PLC leadership team within activity settings and interstitial organizational space, i.e. main entranceways, hallways, faculty workroom, et cetera, using a variety of qualitative and quantitative methods focused on trauma-informed, socially just practices (Atallah et al., 2023; Borden, 2019; Dugan & Safir, 2021) guided through the completed group KMb framework template. Through bringing together individuals from across BGA regardless of positional hierarchy, role, or identity, PLC interventions create new relational networks, increase opportunities for interaction and exchange (Hawe et al., 2009, p. 270). The PLC coordinator together with BGA operations staff will create and share with the external community and internal stakeholders an end-of-year report via newsletters, email, and official updates to BGA’s website, professional development day presentations, and communicate further opportunities for knowledge sharing and professional learning found within the professional learning model. Strategic alignment of intervention deliverables, i.e. survey results, PLC participant reflections, changed school

practices and procedures, will be evidenced through combined reporting of strategic plan implementation goals coordinated through the head of school.

Assessment of organizational readiness for moving to the next phase of the change process includes: assessed degree of responding and framing of trauma-related interventions by PLC participants and leadership team (measuring of participant SoC, LoU, and IC map fidelity); assessed evidence of qualitative engagement within identified anti-oppressive and critical consciousness-related reflexive practices (Capper, 2019; Lopez & Jean-Marie, 2021); number and quality of changed practices, evidence of collective self-efficacy development and participatory processes in keeping with the leadership-focused vision and values of the change such as psychological safety, relational trust, mutuality, and peer support (SAMHSA, 2014). This step in the implementation process will take approximately eight to 10 months.

Step 4 – Refreezing (Resist/Sustain)

At the conclusion of the fourth step of the change process, PLC participants at BGA will be able to identify areas within the organization to consolidate and institutionalize best-practices in addition to identifying next steps to further promote trauma-informed practices (SAMHSA, 2014). Individuals would also be able to act as mentors within the organization and further engage in reflective work based upon critical approaches to education (Lopez & Jean-Marie, 2021). See Appendix H for a brief summary of main roles, responsibilities, and outcomes, along with KMb and evaluation considerations.

Discussion

The last step in the change implementation process represents consolidation and generalizability of new relational and behavioural norms derived from knowledge co-production and mobilization activities in order to prevent regression to previous outmoded ways of being and thinking (McCalman & Potter, 2015). Put plainly, to avoid stakeholder disillusionment and the appearance of a “flavour-of-the-month” or “passing-fancy” approach to trauma-informed, socially

just practices, change leadership efforts will focus on evaluating sustainability and institutionalization of change innovations derived from PLC activities, celebrating successes and highlighting internal stakeholder process engagement along with personal and professional growth, and reporting to the school community and external stakeholders. To this end, the PLC coordinator together with the PLC leadership team, will host follow-up meetings with PLC participants with the goal to review progress of changes, gather important feedback, assess capacity development, and ascertain the generalizability and cultural readiness for the continued adoption of trauma-informed, socially just practices (SAMHSA, 2014). Important motivational aspects of communication such as positive reinforcement of desired changes and recognition of participant effort are salient at this point to maintain individual and group motivation (Deci & Ryan, 2008), energy, and focus to identify next steps, integrate emergent innovations and ideas, and assess new opportunities for organizational growth in keeping with guiding questions posed in Chapter 1.

With regard to monitoring and evaluation, attention will be given to second-order or discontinuous cultural change at the level of cultural paradigm, noting, in particular, changes to compositional structure of cultural themes or paradigms involving learning, transformative processes, and new ways of seeing things (McCalman & Potter, 2015, p. 22). This deeper focus on double-loop organizational learning and theories of action (e.g. questioning underlying assumptions and beliefs to more holistically and flexibly approach problem solving) (Argyris, 2002; Houchens & Keedy, 2009) will assist in mapping deeper levels of engagement and ascertaining levels of change fidelity reflected in SoC, LoU, and IC data (Hall & Hord, 2020). This step is planned to take between seven and 10 months.

Plan to Communicate the Need for Change and the Change Process

The following section outlines the main components of a communication plan that is mindful of purpose and strategy, stakeholder needs, change process timelines, and methods. Central to understanding communication as leadership-in-action, emphasis is given to important motivational and psychological aspects around the purpose, means, and impact of communication in order to

foster positive intra- and inter-personal psychological and behavioural conditions and organizational learning throughout the life of the PLC process in keeping with important guiding questions posed in Chapter 1 on structures, engagement, and culture. Adapting Ward's (2017) knowledge mobilization (KMb) framework, this section explicates salient KMb dimensions over the change process in congruence with trauma-informed, socially just practices.

Purpose and Strategy

Within the planned change initiative, a focus on communication serves myriad change functions necessary for implementation success, such as informational and process transparency (Lacey, 2023), identifying and mitigating resistance (Erwin & Garman, 2010), socialization and capacity building (Reid, 2014), knowledge creation and mobilization (Ward, 2017), maintaining change participant motivation and orientation (Lauer, 2021), and variously disrupting the status quo, envisioning a desired future, legitimizing the change, and co-creation of new realities (Shrivastava et al., 2022). When taken together, these functions allow for communication to be conceptualized as a central act of applied leadership within the planning and execution of organizational change. Moreover, when problematized within the context of Chapter 1's guiding questions around structures, engagement, and culture, the foundational importance of communication cannot be overstated.

Development of the PLC communication plan will be undertaken by the PLC leadership team, facilitated by the PLC coordinator and BGA's business and operations department, with oversight from the head of school and SLT. As a central figure throughout the process, my role as PLC coordinator within the communication plan involves facilitating strategic alignment of KMb functions within existing organizational structures and accountabilities. For example, tied to overall business and operational deliverables to ensure alignment and accountability (Mahoney, 2023), communication processes will reinforce identified strategic implementation plan key performance indicators; organizational mission, vision, and values (Sasaki et al., 2020); credibility; and reputation, and will be revised on a timely basis. Further alignment with existing communication plans and processes around BGA's professional development model will further anchor implementation.

Communication Planning and Stakeholder Analysis

Stakeholder needs for engagement will be differentiated based on identified roles and responsibilities and degree of influence and impact on the change process (Beatty, 2015). For example, with regard to communication planning, internal stakeholder needs will be differentiated based upon whether or not individuals are PLC participants or members of the PLC leadership team, since active participation and engagement require support of processes such as capacity development, relationship building, trust, and fostering collective self-efficacy. In this way, PLC leadership team members and PLC participants whose needs are more robust will receive additional consideration with methods and frequency of communication refined based upon stakeholder feedback and ongoing data received as part of the monitoring and evaluation program (Hall & Hord, 2020). Alternately, external stakeholder needs for non-change participants will prioritize information sharing, awareness raising, fostering institutional buy-in and trust, program coherence, and process transparency (Jabri et al., 2008). For a detailed stakeholder prioritization analysis, see Appendix I.

Methods

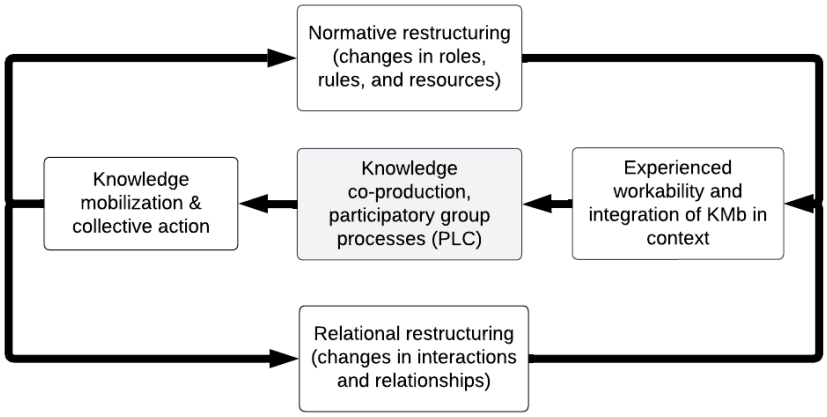
Formal methods of communication will be favoured throughout the change process. As outlined by Chirwa & Boikanyo (2022), formal methods of communication (i.e., email, focus groups, staff meetings, surveys) are viewed as more trustworthy during times of organizational change compared with informal methods (i.e., text, social media, informal meetings). Methods will be tailored to specific stakeholder requirements (Beatty, 2015, pp. 13-17) and take advantage of existing communication channels at BGA. At the same time, not to be forgotten is the essential power of informal face-to-face conversations and dialogue in order to engage stakeholders in the process; fostering positive relationships is a critical factor in implementation success (Skipper & Pepler, 2021). A specific communicative focus on consensus-as-dialogue (Jabri et al., 2008) will be pursued at all levels of the organization, along with both internal and external stakeholders. This latter emphasis on dialogue and person-to-person interaction is further justified from an ADL stance along with my own professional agency and role within both BGA and capacity as PLC coordinator.

Knowledge Mobilization

KMb within organizations pertains to all processes of knowledge creation, interpretation, and dissemination, related to integrating their adoption within organizations. Considered a complex, strategic process, KMb is influenced by varying factors such as purpose and objectives; the nature and type of knowledge being mobilized; individuals involved; strategies; and organizational contexts such as leadership, resources, and influence of relational networks (Ziam et al., 2024, p. 2). Rather than a linear process, KMb processes are conceptualized as multi-directional, iterative, and multi-layered throughout BGA. Figure 1 visually represents KMb processes stemming from collaborative and reflexive PLC practices.

Figure 1

Collaborative Knowledge Mobilization Model



Note. Collaborative knowledge mobilization model adapted from: May, C. R., Johnson, M., & Finch, T. (2016). Implementation, context and complexity. *Implementation Science: IS, 11(1)*, 141-141. https://doi.org/10.1186/s13012-016-0506-3

Knowledge Mobilization Through the Change Process

Applied to the context of the PoP and proposed trauma-informed, socially just PLC process, the KMb plan will be constructed using both procedural and participatory methods and be guided by a modified strategic KMb framework (Ward, 2017), comprising the following guiding questions:

(a) Why mobilize knowledge?

(b) Whose knowledge to mobilize?

(c) What type of knowledge is being mobilized?

(d) How is knowledge being mobilized?

(e) With what effect should knowledge be mobilized?

Each question will be discussed within the steps of the CATS change process in keeping with a participatory, internally-parametered, i.e. self-determined participant goals, change process (Russ, 2010). At the end of each step, PLC participants will complete a knowledge mobilization template (Mosher et al., 2014) to evidence knowledge co-production activities, promote group reflexive practices, and guide knowledge mobilization efforts. See Appendix J for a sample template. The following section presents a brief discussion of initial KMb framework questions framed within implementation steps inclusive of the purpose of knowledge mobilization, source of knowledge target audience, content, methods, and feedback processes.

Step 1 – Unfreezing (Disruption of the Status Quo). Important during the unfreezing process, the primary role of change communication management is to create the ground for both individual and organizational orientation and motivation for change. Using insights from Chapter 2's force field and organizational change readiness analysis, and informed by guiding questions from Chapter 1, attention will be given to social core motives (Fiske, 2010, p. 14) that influence social actors to be either mobilized or inhibited through change. Communication resources will focus on fostering an alternative vision for change that creates necessary internal stakeholder cognitive dissonance and resulting tension required to initiate task mobilization and desire for change (Kotter, 1995; Reid, 2014; Stoll & Kools, 2017). To accomplish this end, when drawing individual focus to the gap between the current state and desired organizational future, PLC coordinator and PLC leadership team messaging will emphasize approach motivation (e.g. efforts related to achieving positive, desired states) and themes aligned to SDT's core motivational themes of autonomy, mastery, and relatedness (Deci & Ryan, 2008), rather than avoidance or fear, to

position the attractiveness and desirability of the future organizational destination and promote positive striving for change (McLaren et al., 2023).

Additionally, internal stakeholder needs will be differentiated and included as part of the initial community survey created by the PLC coordinator and distributed during the launch event, along with development of PLC participant capacity, collective self-efficacy, trust, and psychological safety during subsequent breakout sessions (Vansteenkiste & Sheldon, 2006). Unrelated and self-related stages of concern (SoC) (Hall & Hord, 2020) are anticipated at this introductory step in the process, with formal communication methods such as email, newsletter, and online postings used after the event to satisfy external stakeholder requirements for clarity, transparency, and informational purposes.

Step 2 – Motion or Change. The motion or change step in the implementation process encompasses KMb functions of co-production and mobilization, supporting the facilitated PLC process with participants drawn from faculty and staff after the initial community launch event. Aligned to BGA's professional development model, KMb at this step involves staff and faculty recording initial individual goals for the process and also familiarizing themselves with materials pertaining to trauma-informed, socially just practices in education (Choudhury, 2021, Lindsey, 2019; Welborn, 2022). Overseen and facilitated by the PLC coordinator, delivery of psychoeducational materials will include assessment of PLC participant need for capacity development along with attention to knowledge co-construction protocols through establishment of group norms and procedures (Bonebright, 2010) in keeping with the outlined vision and values guiding the change (SAMHSA, 2014). Group process requirements for the development of trust, mutuality, and peer support will be fostered through activities focused on creating safe spaces within which cognitive, affective, and identity-related aspects of participants can be expressed and validated, creating a culture of organizational psychological safety (Edmondson, 2019). As PLC coordinator, it is important for me at this juncture to model appropriate vulnerability and openness since demonstrated congruence, balanced processing, and relational transparency serve to improve organizational

change readiness (Erwin & Garman, 2010; Lines, 2004) and is in keeping with an ADL stance. KMb templates will be completed by participants at the end of each round of PLC cycles to serve as both documentation of group learning and directions for knowledge mobilization and dissemination (Mosher et al., 2014).

Aligned with the monitoring and evaluation plan, anticipation of individual and group SoC relate to both self and task concerns (stages 1–3) (Hall & Hord, 2020), wherein implicit concerns and questions around innovation use will be accessed and converted to explicit understanding to explore cognitive, affective, and identity-related dimensions of participants and the change (Reid, 2014) and apply transformative processes within the group to encourage critical consciousness development and expansion and re-orientation of relational ties and social networks. Close attention to capacity development at this step focuses on internal stakeholder informational, personal, and management concerns with regard to knowledge creation and mobilization (Hall & Hord, 2020). Through participating in group PLC processes, envisioning within a participatory implementation framework allows for individual ownership and agency, which further strengthens faculty and staff capacity to implement trauma-informed, socially just practices. External stakeholder requirements for information, process transparency, and orientation toward the change will be attended to through both identified KMb template plans and leadership actions produced by PLC participants. Formal communications such as reports issued by the PLC coordinator in consultation with the PLC leadership team and presentations to internal or external stakeholders will be given as required. Reporting to the BGA's head of school and SLT will occur on an ongoing basis in order to fulfil requirements for monitoring and evaluation purposes at the strategic level of the organization.

Step 3 – Re-Freezing. As change efforts are conducted resulting from PLC group processes, needs for communication relate to official reporting structures around the change, maintaining energy and focus within the school around the intervention, and translating group PLC process learnings and applying them within the organization. Moreover, cultural changes resultant from normative and relational restructuring and collective practices should be noted and celebrated within the

organization in order to further legitimize the change effort and present the desirability and validity of changes and support further institutionalization (Shrivastava et al., 2022).

Attention to important aspects of change adoption and student perspectives of the change can be particularly powerful at this end stage to persuade internal and external stakeholders, such as parents and community, and assess program fidelity against long-term objectives and impacts. In this way, attention to bottom-up, micro-level data to gather qualitative feedback from teachers and students will be emphasized (Dugan & Safir, 2021). Further to generating motivation and positive affect, celebration and acknowledgement of change success serves an important change function of validating the change effort to further support consolidation of new behaviours and learning. Every effort by me as PLC coordinator to make note of successes and openly praise evidence of effort and achievement will be pursued. Anticipation of individual and group SoC relates to both task and impact concerns (stages 3 – 5), within which implementation of trauma-informed, socially just practices relate to coordination, cooperation, and refinement of new learning and behaviour (Hall & Hord, 2020).

Change Process Monitoring and Evaluation

The following section presents an overview of a proposed monitoring and evaluation framework, comprised of Hall and Hord's (2020) concerns-based adoption model (CBAM), to support the implementation of a trauma-informed, socially just PLC. Outlining the scope, purpose, and complementary functions of each assessment process, attention is given to the framework's alignment within selected change models and explores implementation considerations with regard to stakeholders' roles and responsibilities, required resources, timelines, strategies, and tools aligned with the proposed change model and related change perspectives.

Monitoring and Evaluation

Originating in the field of business and management studies during the post-WWII period (Deming et al., 2013), quality management and continuous improvement approaches are increasingly being adopted within K-12 educational settings (Bouranta et al., 2020; Mukhopadhyay,

2020). This growing research base adds to the literature on school improvement efforts (Adelman & Taylor, 2007; Fink & Stoll, 2005; Hallinger, 2011) and highlights the importance of monitoring and evaluation processes to guide program improvements. A good monitoring and evaluation plan should be a central component of change initiatives, serving the critical functions of gathering feedback, assessing implementation efficacy, facilitating accountability, and tracking outcomes, among other important areas (Wagle, 2017). To this end, monitoring and evaluation serve complementary yet distinct functions to support change initiatives.

Defined by Markiewicz and Patrick (2016), monitoring is “the planned, continuous and systematic collection and analysis of program information” (p. 12). Akin to driving without a dashboard or windows, change initiatives that lack systematic monitoring processes function without timely, iterative feedback around efficacy and validity of program outcomes, and, as a result, cannot see the potential intended or unintended consequences resulting from change implementation efforts. Effective monitoring systems are implemented by internal members of a change team, with multiple points of data collection that focus on guiding necessary adaptations, instructing change agents around the effectiveness of the current process in the here-and-now, while allowing for feedback and feedforward processes to inform action and improve project design and implementation (Wagle, 2017).

In contrast, evaluation is “the planned, periodic and systematic determination of the quality and value of a program, with summative judgment as to the achievement of a program’s goals and objectives” (Markiewicz & Patrick, 2016, p. 12). Without evaluation, no opportunities exist for reflection to assess achievement of goals or objectives toward desired ends; it is as if, upon arriving at a destination, a driver has no way to judge whether the trip was worth it, or if the intended waypoints or destination were actually reached. Compared to monitoring, evaluation can be undertaken by individuals that are either internal or external to the change process, with data collection taken at specific intervals to assess the efficacy and impact of an initiative (Wagle, 2017).

Taken together, a monitoring and evaluation framework serves to meaningfully identify, track, and analyze data to assist the change implementation process and promote both incremental and terminal process and outcome improvements. In this way, our hypothetical driver can both know where they are and to what extent the trip is going well, and can also assess the quality and efficacy of the journey after they arrive at the destination. When implementing organizational change initiatives, using both monitoring and evaluation tools is essential to support continuous improvement and help change agents to clarify expectations, assess progress, allow for response flexibility in implementation, determine the extent of change adoption, evaluate achievement of desired objectives, and plan next steps for future change processes (Deszca et al., 2020, p. 375).

Monitoring and Evaluation Framework

To facilitate the effective delivery of a PLC, this DiP develops a monitoring and evaluation framework comprising Hall and Hord's (2020) concerns-based adoption model (CBAM) to evaluate stakeholder readiness, capacity, and program adoption. As presented in the introductory implementation section of this chapter, a participatory implementation change framework emphasizes essential monitoring and evaluation that can assess process reliability and allowances for self-determined goal-setting and structures (Russ, 2010), in addition to working through more potentially ambiguous data and outcomes inclusive of multi-directional collective participatory processes that support overall implementation factors such as program coherence, normative and relational structuring, and reflexive practices (May et al., 2016). See Appendix K for a representation of the overall alignment of monitoring and evaluation factors within the selected change process model.

Concerns-Based Adoption Model

Hall and Hord's (2020) CBAM considers the influence of change initiatives on change participants by assessing factors such as individual resistance or stages of concern (SoC) around proposed change and related processes, participant behaviours related to levels of use (LoU) of innovations, and the unique characteristics of change design or innovation configuration (IC) (p.

64-65). The model also explores change inputs such as facilitation and systemic resource requirements (Dudar et al., 2017, p. 53). Through centering affective and psychological domains as important indicators of the change process, CBAM identifies seven stages through which participant perspectives can evolve as they integrate and work through change processes. The seven stages of change are awareness, information, personal concerns, management, consequences, collaboration, and refocusing (Khoboli & O'Toole, 2012).

With a focus on the subjective experiences of participants and sensemaking (Skea, 2021), CBAM can effectively be applied to PLC processes that emphasize individual and group reflective learning (Argyris, 2002; Houchens & Keedy, 2009), collaboration, and constructivist conceptualizations of learning (Ponterotto, 2005). Applying CBAM also aligns the monitoring and evaluation framework to important theoretical underpinnings of the selected change process model, producing congruence in important domains inclusive of field theory, democratic participation, and group processes (Burnes, 2020, p. 35), in addition to trauma-informed, socially just practices (Lopez & Jean-Marie, 2021; SAMHSA, 2014). For program evaluation purposes, CBAM has been demonstrated to be an effective tool to assess change follower concerns, measuring the extent of participant learning and evaluating the success of change program implementation (Hollingshead, 2009; Khoboli & O'Toole, 2012). Costs associated with use of CBAM include potentially significant investments in time and resources required for professional development and training to assist change agents to understand the scope, methodology, and implementation considerations of the model. Investing in adequate professional development, planning, and additional resources would be required to create a conducive context for the framework's successful adoption to the change process during both the pre-change, change, and post-change steps.

Organizational Tools, Timelines, and Change Processes

The following section provides a general outline of relevant organizational tools and timelines to gather and analyze feedback to guide PLC implementation using CBAM. Monitoring

and evaluation processes are strategically aligned with BGA's professional learning model and strategic plan implementation process to increase implementation efficiency, facilitate buy-in, and utilize existing structures to facilitate monitoring and evaluation practices. Similar to previous sections on implementation and communication, monitoring and evaluation processes will be informed by guiding questions posed in Chapter 1 around structures, engagement, and culture in order to holistically address key aspects of implementation planning.

Monitoring and Evaluation Plan

The following section outlines the change process monitoring and evaluation plan through each phase of implementation with a focus on organizational roles, responsibilities, timelines and outcomes.

Step 1 – Unfreezing (Disruption of the Status Quo). At the outset of the change process, the PLC coordinator and the PLC leadership team, comprising self-selected members of the senior leadership and guidance counsellors, will meet to confirm program management arrangements, review the proposed work plan for implementation, and consolidate the proposed monitoring and evaluation framework. During this initial planning phase, data collection and assessment, informed by key questions posed in Chapter 1, will focus on the importance of understanding organizational and individual change readiness (Judge & Douglas, 2009; Oreg et al., 2011; Rafferty et al., 2013; Vakola, 2013; Weiner et al., 2020) to better situate and work through potential stakeholder resistance to change through encouraging engagement and participation (Erwin & Garman, 2010; Lines, 2004), and accelerate identified change-promoting forces while mitigating change-restraining forces identified in Chapter 2's force field analysis.

The PLC coordinator will create an internal stakeholder survey to capture both qualitative and quantitative data in order to identify priorities, assess faculty and staff mindsets around change, set goals, and establish stakeholder buy-in and support. Further, as part of the stakeholder survey, PLC change participants will be identified. At the same time, members of the PLC leadership team will conduct a gap analysis of current organizational data with regard to equity practices (Dugan &

Shafir, 2021; Khalifa et al., 2016) as part of a systemic analysis of school data and relevant research. This step is in alignment with the proposed integrated trauma-informed, anti-oppressive change model (Lopez & Jean-Marie, 2021; SAMHSA, 2014). Results of the survey, gap analysis, and literature review will be shared with faculty and staff at a staff meeting and presented to internal and external community stakeholders to build buy-in, communicate the vision for change, and raise further awareness around the initiative, in addition to addressing stakeholder concerns about the process. Integration of CBAM at this stage will entail an assessment of participant SoC with the use of either one-legged interviews or open-ended concerns statements, complementing SoC questionnaires in addition to drafting initial IC maps (Hall & Hord, 2020). Data analysis and synthesis will be conducted by the PLC leadership team with the intention of modifying and consolidating the initial phase of the PLC process. For example, SoC measures will serve to identify potential change champions, assess organizational blind-spots, and help understand more sensibly change resistors within BGA. This planning phase will take place in the first six to seven months of the first year of the change implementation process.

The first PLC group session will use a learning conversation protocol (Katz & Dack, 2016) as a framework for session facilitation. All members of the PLC group will be informed about the ethical use and collection of data (Iphofen, 2011). Types of data recorded will include pre- and post-surveys, in-session observations, meeting notes and agendas, and participant written contributions, including learning logs and other potential written texts derived from individual and group activities. Together with an identified discussion leader for the session, the PLC coordinator will collect data to document learning, evaluate progress against identified objectives created from the initial phase of the process, and assess participant SoC (Hall & Hord, 2020). Feedback gathered will be essential to help monitor the development of important group and individual measures such as trust, risk-taking, and commitment, along with collective and individual self-efficacy and group psychological safety demonstrated to promote effective group performance (Edmondson, 2019). Data from this step will be reported back to the PLC leadership team to

initiate and guide the upcoming phase of the cycle in keeping with participatory processes and alignment to the vision for change and values. This second step in the monitoring and evaluation process will occur during the next five to six months of the change implementation process.

Step 2 – Motion or Change. Analysis of data gathered during the previous stage in the cycle will be reviewed by the PLC coordinator and PLC leadership team and communicated to internal stakeholders in order to relay findings, address stakeholder concerns, and adapt the PLC process in light of findings. As highlighted by key questions posed in Chapter 1, attention will be given to assessing potential cultural and structural barriers/facilitators related to the intervention, account for unanticipated learning, and modify program design and delivery as a result of double loop learning (Argyris & Schön, 1997; Houchens & Keedy, 2009). For example, PLC group participants might be prepared to try to incorporate trauma-informed classroom management or change BGA school policy or practices based upon their level of comfort or conviction. SoC, LoU, and IC measures will help to identify successful individual examples of changes in practice and chart overall group and organizational changes. During this phase, next steps will be identified and communicated to the wider school community at a staff meeting and through external communications with parents and the community. Additionally, important governance accountabilities are considered at this time with the PLC coordinator submitting a report to the head of school, consisting of samples of qualitative and quantitative data and summarizing important results captured to this point in the process. In accordance with a change reporting and dissemination strategy, the report serves to synchronize the PLC timeline with BGA's strategic plan implementation process and facilitate head of school reporting to the board of trustees. This step is planned to take between nine and 10 months of the change implementation process.

Informed by the ongoing collaboration and identified KMb activities, monitoring and evaluation will continue in an iterative fashion with subsequent PLC sessions. Together with a discussion leader, the PLC coordinator will continue to collect data with an eye to assess intervention success against desired objectives, understand changes to participant SoC, LoC, and

IC measures, and ascertain the sustainability and potential for institutionalization of the change initiative, if successful. Data collected also serves to revisit the investigation, key question and problem framing phase in order to reassess the theory of change and program logic and report to internal and external stakeholders. This step in the implementation process will take approximately nine to 10 months.

Step 3 – Re-freezing. The final evaluation step of the change process relates to consolidation of best-practices, institutionalization of desired changes, celebration of successes, and planning for next steps and future plans for organizational change. CBAM assessment stages at this step include assessment related indicators of intervention impacts on the mindset of change agents, degree of innovation adoption, and the overall validity, reliability, and quality of the intervention as a whole. The PLC coordinator will examine together with the PLC leadership team results from the change step of implementation to assess actions related to stages 4 – 6 of CBAM with regard to indicators of consequence, collaboration, and re-focusing elements of SOC, refinement, integration, and renewal of LOU, and conduct an overall IC assessment (Hall & Hord, 2020). In this way, teacher and staff leaders can be identified and further supported, successful policy, procedure, and practice changes can be highlighted and celebrated, and important next steps identified to encourage institutionalization of desired changes.

Further, emphasis will be given to capturing both formal and informal feedback through gathering both qualitative and quantitative data from both change initiators such as the PLC participants, PLC leadership team and change recipients inclusive of students, parents, faculty, staff (Creswell & Creswell, 2023; Dugan & Safir, 2021). This holistic gathering of data is in keeping with the participatory and collaborative approach applied throughout the implementation process as well as being able to capture both changes in participation and recipient mindsets and practices. Alignment of goals between the PLC process, strategic plan implementation framework, and BGA's professional development model will be captured through administrative review of personal goals set by PLC leadership team members and PLC participants with overall individual and group

progress noted towards identified organizational strategic plan implementation outcomes involving changes to organizational design and behaviour. Prospective changes that align with BGA's strategic plan implementation include potential fostering of external partnerships with community service-oriented organizations, changes to curriculum and program design in keeping with a focus on wellbeing and inclusion, as well as development of innovative and sustainable practices with regard to program delivery.

Next Steps, Future Considerations of the Plan for Organizational Improvement

Returning to the analogy of the driver used in the monitoring and evaluation section, planning for future road trips should include consideration of both the quality of the trip as experienced by the passengers and driver, as well as the assessment of the benefits derived and qualities of arriving at the final destination. Questions like, "Where did we go?", "Was it worth it?", and "Where to next?" are significant to the exploratory process of engagement produced through the participatory PLC process and also help to initiate requisite excitement and energy for future adventures ahead. Using the language of implementation science and organizational behaviour, next steps and future considerations for organizational improvement should be based upon a joint assessment of consequences and impact resulting from both endogenous internal processes and exogenous factors. This reality is particularly important when generative properties of interventions occur within complex adaptive systems that can be characterized as open-ended, non-linear, and multi-directional, within which change initiatives are subject to emerging properties and recursive systemic uncertainties and influences (May et al., 2016, pp. 4-6). For example, it is legitimately difficult, if impossible, to ascertain and disaggregate with complete certainty the contributions and impacts of systemic trauma to structural inequities, family circumstances, biological predispositions, peer relationships, and classroom interactions on student success within a changing and unstable external environment. At the same time, as educators we are faced with the moral obligation and imperative to endeavour to try to support and ameliorate any and all factors that inhibit student learning and development (Shapiro & Stefkovich, 2016).

Unique to a participatory change implementation approach (Russ, 2010), next steps and future considerations should flow largely from internal stakeholder meaning-making and involve assessments of PLC process fidelity against the overall vision and values of the change. Additionally, attention should be given to capturing aspects such as the degree and nature of intervention coupling within the context of the organization, tracking change in relationships, distribution and transformation of resources and knowledge, and assessing pre-intervention activities displaced in order to account for current successes, failures, and plan for next steps (Hawe et al., 2009, pp. 270-271). Moreover, the importance of the using CBAM as a process evaluation tool cannot be understated for planning of next steps related to impact of SoC, integration and renewal of LoU, and state of IC integration.

As emphasized by McCalman & Potter (2015), from a culturalist perspective, when taken-for-granted cultural prescriptions are challenged by divergent organizational change, indicators of sustainable change and future development should look towards second-order, non-linear processes and their effects on the organization (p. 29). In this way, a view to change based upon an onto-epistemological shift towards socially-constructivist and critical perspectives might further refine and define emergent challenges for the organization and allow for the development of further institutional skillful means at supporting and promoting student and organizational wellbeing and mental health. If successful, integration of a participatory ethos derived from PLC participation would further transform school processes and culture to more closely resemble those of a trauma-informed, socially just organization.

Continued elaboration of the current plan beyond the proposed life of the initiative will serve as an important template for decision makers to follow, with further considerations extending to relevant local conditions at BGA that may affect monitoring and evaluation, program implementation, and resource requirements. Practically speaking, next steps for change implementation are also dependent upon the degree to which the PLC process is successfully integrated into existing institutional processes and accountability structures. For example,

institutionalization of the PLC process as an organizational structure can satisfy multiple objectives and accountabilities, namely BGA's strategic plan implementation goals for all three distinct pillars of innovation, sustainability, and diversity, equity, and inclusion. Additionally, regular tracking and measurement of professional learning goals can also be satisfied via participatory processes engendered through the change. Lastly, the result of capacity building in conjunction with increased specialization and training of faculty and staff will likely increase the need for coordination and collaboration at micro-, meso-, and macro-level pathways within the organization along with staffing and training requirements. New positions and capacities within BGA will emerge and further define areas for organizational growth and development going forward.

Summary

Successful change initiatives require complex maneuvering of organizational resources and people over time to initiate and sustain movement toward desired goals and objectives. This effort, when viewed from a systems and capacity development perspective, must integrate recursive, dynamic, non-linear processes to shape individual and organizational interactions effectively within an uncertain and changing environment (Mosher et al., 2014). To this end, Chapter 3 presented an overview of a proposed participatory change implementation framework (Russ, 2010), inclusive of a KMb plan (Ward, 2017) and monitoring and evaluation components (Hall & Hord, 2020), nested within BGA's existing institutional structures and accountabilities. Guided by key questions posed in Chapter 1, the presented implementation plan emphasized important organizational change priorities of alignment, stakeholder engagement, organizational learning, and motivation in support of a value-directed change process facilitated through an integrated trauma-informed, socially just (Lopez & Jean-Marie, 2021; SAMHSA, 2014) CATS change model (Lewin, 1947) in order to facilitate ethical and transformative outcomes for all participants and stakeholders at BGA.

Conclusion

Elaborating upon the identified gaps of trauma-informed practices in education (Gherardi et al., 2020; Herrenkohl et al., 2019; Thomas et al., 2019), this DiP posits epistemological, leadership,

and practical considerations to address relational, structural, and equity-related dimensions of trauma-informed practices in schooling. In this way, a PLC process guided through Lewin's CATS change model is presented as a means to integrate anti-oppressive and trauma-sensitive principles within the local context of BGA in particular and within the broader context of education more generally. As suggested by Machin (2019), despite the fact that international and independent schools operate within expanding markets, they are increasingly homogenized in practice as a result of field-wide pressures to conform, noting that schools in this field are "growing together, apart" (p. 115). This DiP contextualizes micro-level processes at BGA that can help to shape institutional entrepreneurship and agency within an environment of increased field-wide, procrustean pressures to conform; paradoxically suggesting that schools can differentiate themselves by aligning school discourse to macro-level influences and knowledge brokers within complementary organizational fields. In this way, adopting and aligning organizational resources and discourse to trauma-informed principles developed by SAMHSA, BGA can distinguish itself from other independent schools and also adhere to its own cultural narrative, mission, vision, and values while addressing the PoP to the benefit of students, faculty, staff, administration, and the extended school community.

Narrative Epilogue

In going through the reading, research, reflection, and writing process, I am struck by the iterative and complex relationship that I have developed with my own thoughts and scholarship regarding organizational studies, education, and the field of mental health and well-being. In relating to my research journey, I can see the development and elaboration of my own passion and conviction that engagement and participation in schools represents a path forward to foster equitable outcomes and resilient communities. As Stoll & Kools (2017) state when speaking of schools as learning organizations "while many are seduced into treating information as knowledge, it is not; social processing brings information to life" (p. 10). To this I would add that the doctoral research journey of collaboration and dialogue between colleagues and professors brought my

own ideas to some state of fruition while always continuing to bounce around in my head for further elaboration, conjecture, or debate. I would hope that similarly, schools as learning organizations, should continue to expand their ability to integrate diverse perspectives and sources of knowledge to better adapt to future challenges and transform collective action to foster equitable and trauma-informed individual, group, and organizational wellbeing. Only by embracing this transformative journey can schools truly become sources of resilience and hope, lighting the way toward a brighter, and more inclusive future for all.

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Appendix A

Alignment Between Authentic Leadership and Distributed Leadership

	Authentic Leadership	Distributed Leadership
Related Epistemologies	Constructivist-Interpretivist; Humanist, Strength-based (Seligman, 2018)	Distributed Cognition (Gronn, 2000), Activity Theory (Plakitsi, 2013); Social-Cognitive Theory (Bandura & Davidson, 2003)
Ontologies	Reality is viewed from an ethical, humanist, and strength-based perspective. Moral sensibilities and balanced processing guide leader/follower interactions and relationships.	Reality is viewed from a system perspective of distributed cognition with importance placed on socio-cultural contexts to guide interdependent and interconnected relationships.
Mechanisms	Generative fields of influence are created through moral vision and purpose. Balanced processing and relational transparency model congruence and foster relational trust and commitment.	Cognition is distributed in the material and social situation that shapes reciprocal influence and leadership practices (Harris, 2007, p. 317).
Desired Outcomes, Axiology	Positive inter- and intra-psychological states (i.e., trust, commitment, hope, optimism, congruence).	DL is a descriptive, rather than a prescriptive, theory (Harris, 2007, p. 317).

Note. The above table highlights important theoretical complementarity and alignment between selected leadership approaches.

Appendix B

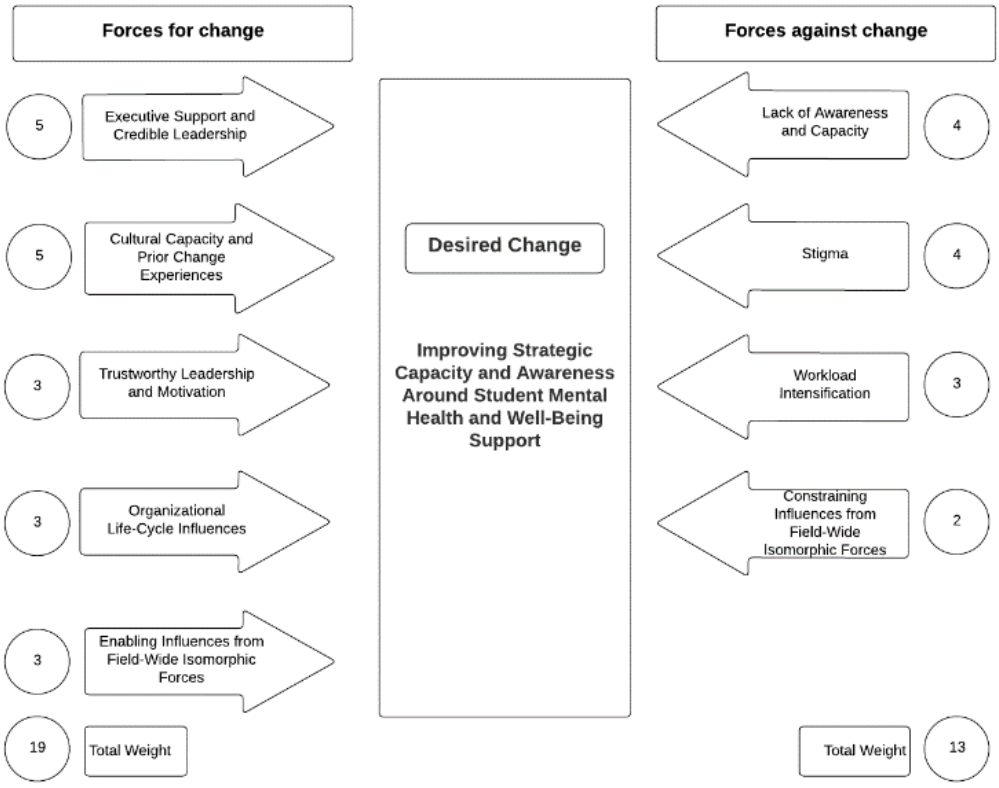
Integrated Trauma-Informed, Socially Just Organizational Change Framework

Model	Step 1	Step 2	Step 3	Step 4
CATS (Lewin, 1947)	Unfreezing		Motion or Change	Refreezing
SAMHSA (2014) Trauma-Informed Approach	Realize: Understand the pervasiveness of trauma and its effects on individuals, groups, organizations, and communities.	Recognize: Recognize the signs of trauma.	Respond: The organization, system, or program responds by applying principles of a trauma-informed approach to all areas.	Resist: Resist re-traumatization through a focus on organizational practices that promote wellbeing and decrease potentially harmful practices.
Lopez and Jean-Marie's Anti-Oppressive Change Framework (2021)	Name: Critical consciousness-raising through self-reflection, unlearning, and learning about identity-related systemic inequities.	Own: Recognize responsibility and identify potential anti-oppressive actions to take.	Frame: Intentionality and purpose around taking anti-racist and anti-oppressive action. Action areas include policy, curriculum, awareness-raising, and systemic change.	Sustain: Collaborative mentorship to promote further reflection and identify growth areas for personal and professional practice to further the journey aspects of change.

Note. The table presents the anticipated implementation process and alignment of Lewin's CATS Model (1947), SAMHSA (2014) Trauma-Informed Approach, and Lopez and Jean-Marie's Anti-Oppressive Change Framework (2021).

Appendix C

Force Field Analysis



Note. Adapted from Deszca, G., Ingols, C., & Cawsey, T. F. (2020). Organizational change: An action-oriented toolkit (4th ed.). (pp. 113-115) SAGE Publications. https://ocul-uwo.primo.exlibrisgroup.com/permalink/01OCUL_UWO/r0c2m8/alma991044418095005163

Appendix D

Stages of Implementation, Communication, and Evaluation

Implementation Factor	Characteristics		
Stages of Change (Lewin, 1947)	Unfreezing	Motion	Re-Freezing
Evaluation Phases (Hall & Hord, 2020)	Unrelated, Personal	Task	Impact
Stage of Concern (SoC)	Stage 0: Unrelated Stage 1: Informational Stage 2: Personal	Stage 3: Management	Stage 4: Consequence Stage 5: Collaboration Stage 6: Refocusing
Level of Use (LoU)	Non-Use Orientation Preparation	Mechanical Routine	Refinement Integration Renewal
Communication Strategy (Shrivastava et al., 2022)	Disruption Envisioning	Legitimizing	Co-creating

Appendix E

Step 1 – Roles, Responsibilities, Outcomes, KMb and Evaluation Strategies

Main Roles	Responsibilities	Outcomes	KMb & Evaluation
Change Initiator: PLC coordinator	Establish change implementation steering committee (e.g. PLC leadership team) Facilitate group processes (development of norms and expectations, individual and group goals, process guidelines) (Bonebright, 2010) Research and facilitate learning around trauma-informed psychoeducational content Organize and host PLC launch event with the PLC leadership team	Development of shared understanding and responsibility, increasing openness to cultural change, and buy-in, curiosity, along with initial trust and teamwork. Establishment of self-reflection, collaborative group processes Creation of a guiding coalition supportive of the change effort Address stakeholder concerns about the process	Disruption (Shrivastava et al., 2022); Establishment of stages of concern (SoC), levels of use (LoU), and innovation map configuration (IC) (Hall & Hord, 2020)
Change Recipients and Initiators: PLC leadership team	Attend and be active participants in the PLC leadership team meetings Engage in group processes and trauma-informed learning Organize and host PLC launch event with the PLC coordinator Review feedback from program launch event and community survey	Creation of a guiding coalition supportive of the change effort Increased leadership awareness, buy-in, and institutional support for trauma-informed practices Revision and approval of change plans.	Capacity building that fosters transparency, trust, and psychological safety (Edmondson, 2019; Morgan & Zeffane, 2003)
Change Recipients: Faculty and staff	Attend and participate in program launch event Complete community feedback survey Participate in focus groups	Increased openness and curiosity around the vision and components of the change Change pre-contemplation and self-selection of PLC participants	Qualitative and Quantitative feedback from community survey and focus group discussions (Creswell & Creswell, 2023)

Appendix F

Step 2 – Roles, Responsibilities, Outcomes, KMb and Evaluation Strategies

Main Roles	Responsibilities	Outcomes	KMb & Evaluation
Change Initiator(s): PLC coordinator & PLC leadership team	Facilitate group processes (development of norms and expectations, individual and group goals, process guidelines) Facilitate learning around trauma-informed psychoeducational content (SAMHSA, 2014) Organize and facilitate PLC cycles (Katz & Earl, 2016) Perform a gap analysis of current organizational practices (Deszca et al., 2020, p. 104-116) Analyze school data, relevant literature and research, gather feedback from stakeholders through surveys and focus groups (Dugan & Safir, 2021; Khalifa, 2018)	Development of individual and group critical consciousness (Khalifa et al., 2016; Lopez & Jean-Marie, 2021) related to anti-oppressive, trauma-informed change Approval of change implementation plan that aligns with a vision for change (Hipp et al., 2008) Outline a change plan including short-, medium-, and long-term goals, along with communication and implementation strategies Address stakeholder concerns about the process	Envisioning (Shrivastava et al., 2022); Stages of Concern assessment (SoC) (Hall & Hord, 2020)
Change Recipients: PLC participants (faculty & staff)	Engage in group processes and trauma-informed learning	Identify potential individual and group actions toward desired change Identify learning gaps and limiting mental models through self-reflection and group processes Identify potential action areas for change inclusive of policy, processes, and curriculum	Capacity building that fosters transparency, trust, and psychological safety (Edmondson, 2019; Morgan & Zeffane, 2003)

Appendix G

Step 3 – Roles, Responsibilities, Outcomes, KMb and Evaluation Strategies

Main Roles	Responsibilities	Outcomes	KMb & Evaluation
Change Initiator: PLC coordinator, PLC leadership team	Monitor and assess intervention effectiveness and fine-tune feedback processes) Refine short-, medium-, and long-term goals based upon feedback	Increased understanding of process effectiveness and reliability. Refinement of self-reflection, collaborative group processes	Co-creating; Legitimizing (Shrivastava et al., 2022) Measurement of SoC, LoU (Hall & Hord, 2020)
Change Initiator: PLC participants	Implement identified changes	Identify and experiment with changes to school-wide policies, practices, and procedures aligned to a trauma-informed approach (Atallah et al., 2023) Increased community and stakeholder awareness, buy-in, and institutional support for trauma-informed practices	Completion and implementation of KMb framework (Ward, 2017) Qualitative and quantitative documentation of changes (Dugan & Safir, 2017)

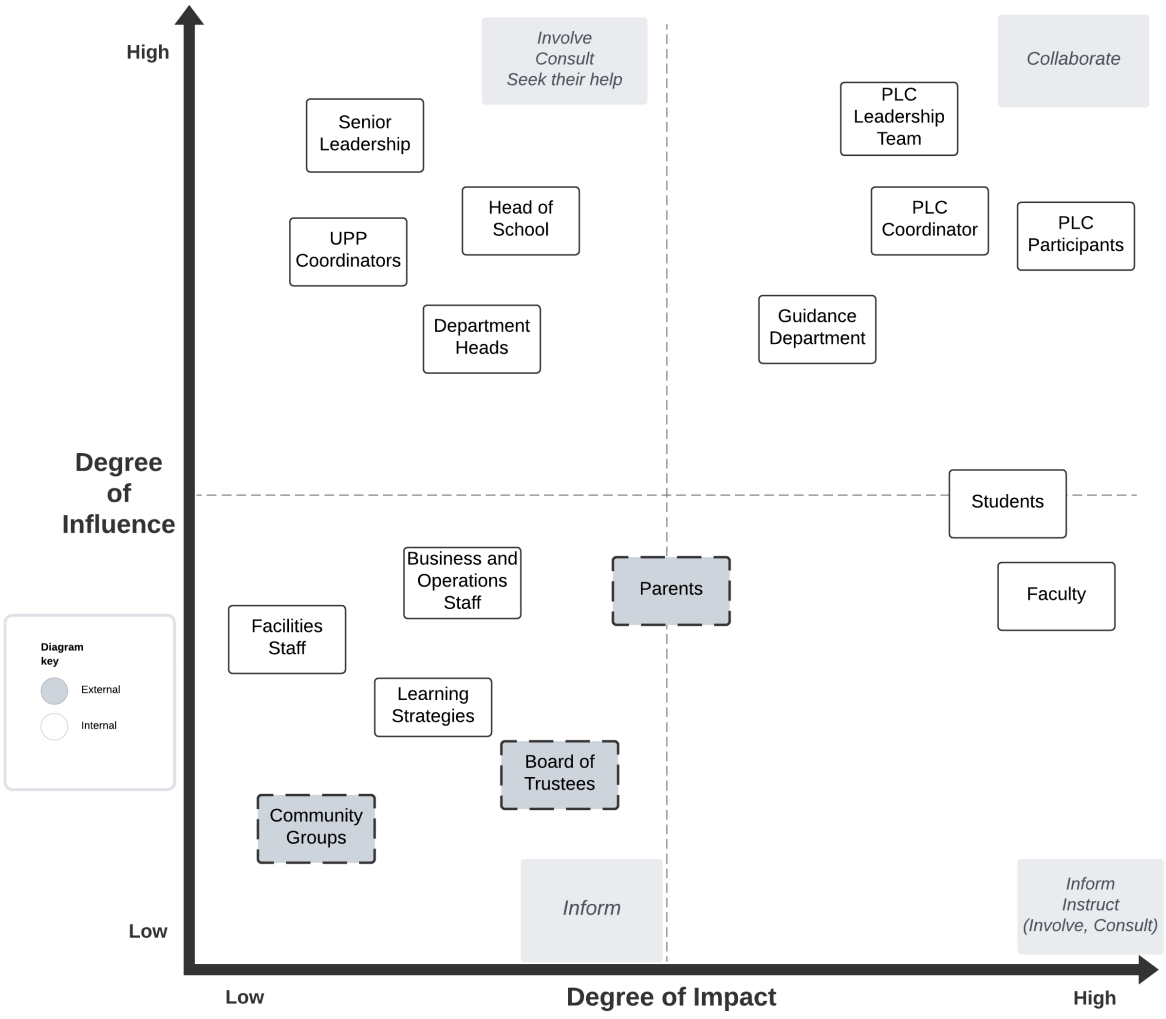
Appendix H

Step 4 – Roles, Responsibilities, Outcomes, KMb and Evaluation Strategies

Main Roles	Responsibilities	Outcomes	KMb & Evaluation
Change Initiators: PLC coordinator, PLC leadership team, PLC participants	To raise awareness and positive emotion around change efforts (Seligman, 2018) To promote institutional sustainability and desired organizational change To consolidate gains and entrench new cultural norms and ways of being (McCalman & Potter, 2015)	Celebrate successes and highlight progress Report results to the school and wider community Promote individual and group reflection Assess necessity to modify or create existing or new structures, processes, procedures, or routines Identify next steps and reflect on individual and group learning Assess new opportunities for organizational growth Consolidate changes into existing and new organizational structures, policies, and procedures	Co-creating; Legitimizing (Shrivastava et al., 2022) Evaluation of SoC, LoU, & IC (Hall & Hord, 2020)

Appendix I

Stakeholder Prioritization Matrix



Note. Stakeholder prioritization matrix adapted from: Beatty, C. (2015). *Communicating during an organizational change.* Queen's University IRC. https://irc.queensu.ca/communicating-during-an-organizational-change/

Appendix J

Template for Collaborative Knowledge Mobilization

Category	Key Questions
Knowledge	What are the key learnings?
Audience	Who do we want the knowledge to reach?
Function	What would we want this audience to do with the knowledge?
KMb methods	How will we most effectively reach this audience? What tool/method?
Challenges and resources	What obstacles might we anticipate and how can we address them?
Time frame and leadership	What is our time frame? Who will take the lead?
Skills	What skills will we need to reach the audience? What is our plan to provide this skills training and to make the training known to our partners?
Allies/partners	Who will be involved?

Note. Template for collaborative knowledge mobilization adapted from: Mosher, J., Anucha, U., Appiah, H., & Levesque, S. (2014). From research to action: Four theories and their implications for knowledge mobilization. *Scholarly and Research Communication, 5*(3). https://doi.org/10.22230/src.2014v5n3a161

Appendix K

Alignment of Monitoring and Evaluation Frameworks

Process Models	Target Audience and Characteristics	Foci	Timeline
Professional Growth Model	Faculty – Performance evaluation, peer mentorship, self-directed learning Staff – Annual performance goal setting	Individual Goal-Setting, Capacity Development	Faculty – 3-Year process cycle Staff – Annual process cycle (renewing)
Strategic Plan Implementation Framework	Faculty and Staff – Programmatic goals differentiated between school level and function	Innovation, Sustainability, DEI	Full School – 5-Year process
Proposed PLC Process	Faculty and Staff – Participatory, self-determined goals differentiated between individual, group, and organizational levels	Trauma-Informed, Socially Just Practices	Full School – 3.5-Year process

Note. The proposed PLC process will be added as an optional component to the faculty professional growth model in addition to serving as a program deliverable within BGA's larger strategic implementation plan.