

8-27-2024

# Homeschooling and Publicly Funded Education - Achieving the Best of Both Worlds

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## Recommended Citation

D'Amico, T. (2024). Homeschooling and Publicly Funded Education - Achieving the Best of Both Worlds. *Dissertation in Practice at Western University*, 422. Retrieved from <https://ir.lib.uwo.ca/oip/422>

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## **Abstract**

This Dissertation-in-Practice (DiP) provides a roadmap to address the trend of increased numbers of parents choosing homeschooling in the Central Catholic School Board (CCSB, a pseudonym). The CCSB is a publicly funded Ontario Catholic school district serving more than 40,000 students across a mixed urban, rural, and suburban region. A critical theory approach to addressing the increase in homeschooling by students from underserved marginalized communities provides an explicit focus on social justice. The selected solution to address the complex problem is a system-wide implementation of flexi-schooling. A future state sees flexi-schooling providing alternatives to status quo structures by allowing personalized learning pathways that include some instruction at home and some instruction at school. The DiP addresses the importance of the director of education and executive council leading the change initiative. Transformative and third-order change may result in flexible attendance options, independent course selection, optional participation in assessment and evaluation, and personalized graduation pathways. Strategies for system-wide change include leveraging the CCSB's existing focus on deep learning and use of a coherence framework. The DiP explores both transformative and distributed leadership practices during the change implementation process. It also examines a modified change path model along with a monitoring, evaluation, and communication plans. The change implementation plan spans three-years to coincide with the district's multi-year strategic plan. The roadmap to system change has the potential to disrupt the status quo structure of publicly funded education.

*Keywords:* homeschooling, critical theory, flexi-schooling, social justice, transformative leadership, distributed leadership

## **Executive Summary**

This Dissertation-in-Practice (DiP) provides a roadmap to address the complex issue of an increased trend of parents selecting homeschooling for their children (Kunzman & Gaither, 2020; MacPherson, 2022; Statistics Canada, 2021; Valiente et al., 2022). Critical theory frames the complex social justice aspect of this problem of practice. The DiP outlines transformative and distributed leadership actions that move the Central Catholic School Board (CCSB, a pseudonym) towards the desired future state of flexi-schooling. Flexi-schooling challenges the status quo structures of publicly funded education by allowing personalized learning pathways that combine instruction at home with instruction at school.

Chapter one of the DiP contemplates my positionality as director of education of the CCSB and my privileged position to focus not only on iterative improvements but also on educational reform. Positioning this problem of practice as a social justice issue, research is referenced that shows that race, religion, gender identification, indigeneity and their intersectionality are factors influencing the increased trend of homeschooling (Averett, 2021; Fontenelle-Tereshchuk, 2021; C. A. Harris & McClure, 2022; House & Webster, 2021; Koch et al., 2023). Chapter one elaborates on the connection between social justice and Catholic social teaching and spirit work (Kostoff, 2019; MacDonald & Brown, 2021; McGowan, 2019).

The following three impacts of the increase in homeschooling are raised: (a) loss of provincial funding; (b) inequity of school choice, especially for those from underserved marginalized communities (Dennison et al., 2020; MacPherson, 2022; M. D. Stewart, 2020); and (c) lost opportunity to share the tenets of Catholic faith (Bosetti & Van Pelt, 2017; Chapman, 2014; Kostoff, 2019).

Chapter one provides a conceptual framework to address the PoP. The framework looks at the intersection of complexity theory along with critical theory and social constructivism. The chapter concludes with a review of the needed leadership at the micro, meso, and macro levels of the organization.

Chapter two of the DiP addresses the leadership practices applied within a change model framework to affect the PoP. The Ontario focus on transformational leadership via the Ontario Leadership framework (OLF) is outlined (Hitt & Tucker, 2016; Leithwood, 2021; Leithwood et al., 2019). Contrary to the OLF, this chapter addresses the preference for transformative leadership actions that address power imbalances, social justice, oppression, and marginalization (Shields, 2020; Tapia-Fuselier, 2023). This chapter includes a review of the eight tenets of transformative leadership (Shields, 2020).

A key component of chapter two of the DiP is the selection of the change path model to frame the change implementation plan (Deszca et al., 2020). This model combined with the three levels of culture model (Schein & Schein, 2017) provides a focus on organizational culture. A predictor of the success of a change initiative is organization readiness (Aboobaker et al., 2022; Mathur et al., 2023; T. Wang et al., 2023). The CCSB's score on a readiness for change questionnaire (Deszca et al., 2020) and on the DICE framework for predicting change success (Boston Consulting Group, n.d.) indicate change readiness.

I present three possible solutions to address the PoP. One possible solution is to implement a single pilot project at the virtual school, allowing flexible school options at this school. A second possible solution is to implement a professional learning network with all principals to consider flexible learning models. The proposed solution takes advantage of

existing coherence structures in the district by implementing system-wide central implementation of flexi-schooling across all schools supported by all departments.

Chapter three encapsulates the change implementation process to address the increased trend of parents selecting homeschooling. A multi-year implementation process supported by research is outlined (Bohanon et al., 2021; Fullan, 2020; Sotiriou et al., 2016; Waters & White, 2015). The change implementation plan builds upon the four stages of the change path model: (a) awakening, (b) mobilization, (c) acceleration, and (d) institutionalization (Deszca et al., 2020).

The final chapter of the DiP conveys actions to address barriers to change and known reasons for change implementation failure (Aldridge & McLure, 2023; McLure & Aldridge, 2022; Simper et al., 2022). I outline a detailed plan for communication, including knowledge mobilization. Principles of equity and decolonization frame the monitoring and evaluation process (Khalifa, 2018). Plan-Do-Study-Act cycles serve to monitor and evaluate the change process (Chen et al., 2021; Connelly, 2021; Mekhitarian, 2022).

The DiP concludes with next steps and future considerations including the importance of ensuring opportunities for input from underserved marginalized communities. This DiP highlights the urgent need to address inequities that exist in publicly funded education.

## **Acknowledgment**

I respectfully acknowledge that I am located on the unceded land of the traditional Algonquin Anishinabe people. I pay respect to all Indigenous people in this region, and I recognize my privileged position in K-12 education to take meaningful action towards truth and reconciliation across my district.

I am grateful to my wife Michelle for supporting my pursuit of this Doctorate degree, even though it meant several years of committed evenings and weekends. I am thankful to my two daughters, Laura and Christina who are models of lifelong learners.

I am thankful to the board of trustees at my school district who supported my studies and recognized the importance of knowledge mobilization in the areas of leadership, equity, and Indigenous studies as a means to support Catholic social teachings and the dignity of all. A vocation in Catholic education over the last 34 years has been a privilege.

Thank you to Dr. Michael Fullan, whose work has inspired me over my 34-year education career, and his continued focus on research, writing, and continuous learning. I attribute my passion for education reform to his inspirational messaging and focus on coherence and deep learning.

I am grateful to my colleagues in this EdD cohort who challenged my thinking and provided inspiration during many insightful discussions. Thank you to the professors at the University of Western, and in particular to Dr. Scott Lowrey, who was instrumental in offering feedback and encouragement for this Dissertation-in-Practice.

I dedicate this work to my grandparents who came to Canada with a grade 3 education. The D'Amico and Apolcer family sacrifices provided opportunities for my parents to pursue careers in education and to instill in their children the importance of life-long learning.

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### **List of Acronyms**

CCSB	Central Catholic School Board
CIP	Change Implementation Plan
DiP	Dissertation-in-Practice
EQAO	Education Quality and Accountability Office
OCT	Ontario College of Teachers
OLF	Ontario Leadership Framework
OSSD	Ontario Secondary School Diploma
PESTEL	Political, Economic, Social, Technological, Environmental, Legal
PoP	Problem of Practice
SWOT	Strength, Weakness, Opportunity, Threat

## Definitions

**Decolonization:** “is a complex and multilayered process of eliminating colonial influences by freeing a colonized group of its colonial status” (Styres, 2017, p. 35).

**Deep Learning:** Deep learning is learning that sticks with you throughout life. The deep learning framework is comprised of four elements: (a) learning environment, (b) learning partnerships, (c) pedagogical practices, and (d) leveraging technology. In addition to the four elements, deep learning includes a focus on six global competencies: (a) communication, (b) collaboration, (c) character, (d) citizenship, (e) critical thinking, and (f) creativity (Fullan et al., 2018).

**Distributed Leadership:** Several leaders take part in leadership activities to accomplish shared organizational goals. In distributed leadership, leadership may exist at different levels of an organization in contrast to hierarchical single leader structures (García-Torres, 2019).

**Equity:** “is an approach to ensuring equally high outcomes for all by removing the predictability of success or failure that currently correlates with any racial, social, economic, or cultural factor” (Safir & Dugan, 2021, p. 29).

**Flexi-schools:** is where parents manage their child’s education with some instruction occurring at home and some instruction at school (Schafer & Khan, 2017).

**Homeschooling:** is “an alternative method of learning that takes place outside the public or private/independent school environment. Parents choosing home-schooling have the primary responsibility of managing, delivering and supervising their children's courses and programs of learning” (Statistics Canada, 2022a).

**Knowledge Mobilization:** Knowledge mobilization is an umbrella term for “the range of active approaches to encourage the creation, sharing and use of research-informed knowledge alongside other forms of knowledge” (Powell et al., 2018, p.38).

**Oppression:** Oppression refers to the discrimination, control, and dehumanization of an individual or group of individuals and resulting systematic prejudice against some people while others benefit (Freire et al., 2018).

**Scholar Activist:** A scholar activist considers the relationship between knowledge and resulting social, cultural, and economic disparities. Scholar activists consider what actions will address oppression and power redistribution (Apple, 2010).

**Transformational Leadership:** “... the importance of an organization’s mission and outcomes, as well as embedded principles of participatory leadership, empowerment, and proaction, this style of leadership may be particularly useful in human service organizations...” (Middleton et al., 2015).

**Transformative Leadership:** “is a critical leadership theory that emphasizes inclusion, equity, excellence, and social justice” (Shields, 2020). Transformative leadership challenges the status quo by addressing systemic and structural practices that perpetuate inequities.



## **Chapter 1: Problem Posing**

An emerging trend in K-12 education across the country is the increased number of parents selecting homeschooling for their children. The Central Catholic School Board (CCSB, a pseudonym) has experienced this trend since beginning to track homeschooling in 2014. The effects of this trend are multifaceted including a loss of enrolment revenue, a lack of oversight of homeschooled students, and lost opportunity to share the tenets of Catholic faith.

This Dissertation-in-Practice (DiP) will analyze this complex problem of practice (PoP). The DiP will serve as a roadmap for leadership actions toward a preferred future state that provides more flexible school structures and processes to promote student achievement and well-being for those that traditionally select homeschooling. Critical theory and a system's leadership lens positioned within the district's coherence and deep learning framework (Fullan et al., 2018) will underscore the social justice view to challenge the district's status quo structures and processes. A critical theory approach to the PoP provides an explicit focus on social justice that includes the convergence of power, oppression, and marginalization (Apple, 2019a; Capper, 2019; Chunoo et al., 2020; Green, 2017; Khalifa, 2018; Rexhepi & Torres, 2011).

### **Positionality and Lens Statement**

The following section outlines my leadership position, positionality and world lens. Research has shown that worldview and positionality influence a researcher or leader's choice of topic to investigate and influences the process and outcome of the investigation (Bukamal, 2022; Darwin-Holmes, 2020; Olukiun et al., 2021; Throne & Bourke, 2022).

#### **Positionality**

As the director of education for the CCSB, I recognize my privileged position. I view myself as a scholar activist (Apple 2010, 2016, 2019a, 2019b; Croog et al., 2018; Daniels, 2018)

working within a legacy education system, focused on creating a culture of continuous improvement and educational reform. As noted by Apple (2010), scholar-activists critically evaluate knowledge and resulting social, cultural, and economic disparities. Early in my educational career, I worked with youth involved with the criminal justice system and with youth who had dropped out of school. These experiences shaped my appreciation for the value of programs and structures that support students who may not be succeeding in the traditional school system. I observed that many of these students were from underserved marginalized communities.

In my 34<sup>th</sup> year as an educator in the district, I am aware that the diversity has significantly increased since my days as a student in this same district. As a heterosexual, White, middle class, Christian male, I went through the educational system without facing the same barriers as those from hegemonic defined underserved marginalized communities. It is only now, towards the end of my career that I recognize how these privileges opened leadership opportunities in an education system that protected the status quo (Dean & Forray, 2021; Gause, 2021; Khalifa, 2018; Khalifa et al., 2016; Tilghman-Havens, 2020).

### **Social Justice and Equity**

The opportunities for professional learning have provided me refreshed insights into unconscious bias, discrimination, and oppression in the educational system. Listening to elders and other Indigenous members of our school community prompts needed discussion on the issue of intergenerational harm. Working with equity deserving groups, including a Black student advisory council, challenges me to address power imbalances and commit to agency for others. The opportunity to serve on national education organizations has allowed me to see how issues of hegemony and oppression are common concerns of leaders across the Canadian education

milieu. Social justice, equity, and a focus on decolonization have shaped my critically oriented epistemology (Capper, 2019; Chunoo et al., 2019; Gélinas-Proulx & Shields, 2022; Kowalchuk, 2019; F. Wang, 2018; Warner, 2020; Whitaker, 2022). Research has shown that race, religion, gender identification, indigeneity and their intersectionality matters when it comes to students choosing homeschooling instead of publicly funded education (Averett, 2021; Dennison et al., 2020; Fontenelle-Tereshchuk, 2021; C. A. Harris & McClure, 2022; He et al., 2015; House & Webster, 2021; Koch et al., 2023; Puga, 2019; M. D. Stewart, 2020, 2023; Woodford, 2020).

### **Leadership and Power**

Integrity and trust are key characteristics that inform my actions as a leader. My Catholic upbringing and commitment to Catholic social teachings with a focus on the dignity of all, shapes my world lens. I recognize that district-wide implementation of system initiatives is unlikely in the absence of trust (Banwo et al., 2022; Kutsyuruba & Walker, 2016). I posit that my positional power in the district along with previously demonstrated commitment to the organization dealing with complex equity challenges, positions me with a circle of influence to shape the organization's future direction related to the PoP. Chapter two of this DiP examines specific leadership actions based on this agency and trust. Chapter three will further explore the importance of ethical leadership in the change process.

Addressing the PoP of students leaving publicly funded education signals a challenge of the status quo and the current hegemonic position of the education system (Fullan & Gallagher, 2020; Gutek, 2013). I posit that students experiencing marginalization who are considering leaving publicly funded school systems would benefit from leaders with positional power and a commitment to social justice. Leaders committed to social justice, work to provide students from underserved marginalized communities with agency to ensure their interests are represented

(Apple, 2017; Rexhepi & Torres, 2011). As a change leader with agency, I recognize the interconnectedness of power, privilege, and policies that have resulted in oppression of marginalized groups. This DiP considers Catholic social teachings, social justice and leadership as foundations to ensure the dignity of all students in publicly funded education.

Critical leadership theory has influenced my focus on equity and anti-colonial practices (Green, 2017; Shields & Hesbol, 2020). The district's use of data (student census data, Indigenous self-identification) and willingness to address colonialism and gaps in culturally relevant pedagogy has resulted in a district-wide learning stance and increased trust in my agency as the director of education to lead district improvement (Ezzani, 2021; Khalifa et al., 2019). Recognizing the imbalance in power between those in leadership and those oppressed is a catalyst to address the PoP by allocating resources to work for a more just and equitable district (Khalifa, 2018; J. Ryan & Rottman, 2007).

### **Religious and Spiritual Lens**

Through a Catholic lens, the CCSB espouses a holistic education where gospel values permeate beyond the curriculum into all aspects of Catholic social teaching and social justice (Kostoff, 2019; MacDonald & Brown, 2021; McGowan, 2019). This district approach aligns with my leadership and ethical focus on the dignity of each child. Taking a spiritual perspective to the PoP opens more inclusive connections and motivations for change. The spiritual values of hope, and caring for the well-being of others contributes meaning and purpose to the work in education. This is important for a district that has an increasing millennial workforce that wants to make a difference in the world (Jirasevijinda, 2018; Wood, 2019; Woosnam et al., 2019; Zaharris et al., 2017). A spiritual vision gives a sense of purpose to the entire district and spiritual intelligence inspires educators to serve (Chapman et al., 2021; Zohar, 2005).

The district's distributed approach to leadership along with a focus on spirituality allows leaders to find meaning in their work and a sense of purpose (Longman, 2021). A shared purpose of well-being for all, or spirit work (Fullan & Edwards, 2021; Rincón-Gallardo, 2020), provides a system-wide motivation to address the increased trend of homeschooling.

### **Agency**

A critical paradigm considers the political actors and power struggles that have resulted in oppression and focuses on challenging the status quo (Apple, 2019a; Chunoo et al., 2020; Fuchs, 2021; Rexhepi, & Torres, 2011; Strunk & Locke, 2019). This provides a frame for analyzing homeschooling selection by students from underserved marginalized communities. As a transformative leader, I am in a position to articulate a vision and direction that permits and promotes flexibility and alternative experiences within the traditional school system. Research has shown that transformative leadership can promote an environment that benefits everyone, regardless of their ethnicity, gender identity, religion or other characteristics that make them unique (Agosto & Roland, 2018; Fowler et al., 2023; McKee, 2022; Shields, 2020, 2021, 2022). This position is consistent with my leadership views, ethics of the profession, and ethics of care to ensure that those from underserved marginalized communities do not face further marginalization (Shapiro & Stefkovich, 2016; Starratt, 2005).

As will be seen in the next section, my positionality, focus on social justice, and leadership align with the values and culture of the CCSB.

### **Organizational Context**

The CCSB is a medium-sized Ontario Catholic school district. The district has over 75 schools including two virtual schools serving over 40,000 students across a mixed urban, rural, and suburban region. The PoP for this district examines the complex trend of an increased

number of families selecting homeschooling. This trend is occurring across Canada (Kunzman & Gaither, 2020; MacPherson, 2022; Neuman, 2019; Statistics Canada, 2021; Valiente et al., 2022; Zwaagstra et al., 2023). Prior to the pandemic in 2020, the CCSB experienced a 97% increase in homeschooling between 2014 and 2020 (Central School Board staff, personal communication, August 26, 2021). As the director of education, I posit that many families selecting homeschooling were dissatisfied with the Ontario education system. Others chose homeschooling to deal with mental health challenges and resulting stresses facing students (Kunzman & Gaither, 2020; Makridis et al., 2022; Ray, 2022; Valiente et al., 2022).

### **Publicly Funded Catholic Education**

Ontario, Alberta, and Saskatchewan are the only provinces that provide full funding for Catholic education (Bosetti & Van Pelt, 2017; Faubert & Paulson, 2020; Macpherson, 2022). As a Catholic school system, the CCSB has a focus on a holistic education. A holistic education includes the development of each student academically, socially, spiritually, emotionally, along with a focus on social justice (Chapman et al., 2014; Gurning & Windarti, 2023; Kostoff, 2019; MacDonald & Brown, 2021). Senior leaders in the CCSB view publicly funded education as a means to share Catholic values with all students (Bosetti & Van Pelt, 2017, Pollock, 2013, Salkeld, 2023; Van Pelt, 2015).

### **Governance Structure**

Ten publicly elected trustees serving a four-year term (Ontario Education Services Corporation, 2022) govern the CCSB. The key responsibilities of the board of trustees are to provide strategic focus and fiduciary stability (D. W. Campbell & Fullan, 2019). The Ontario Education Act authorizes districts to approve education policies; however, the board of trustees must comply with provincial guidelines. This provincial oversight has ensured centralized

control of education in Ontario (Capano, 2015; Faubert & Paulson, 2020; Sheppard & Galway, 2016) including the procedural requirements for homeschooling (Ontario Ministry of Education, 2002).

This DiP looks at the PoP within a critical theory framework that necessitates consideration of the organizational context of power dynamics, governance, leadership, change, and decision-making and the resulting oppression and marginalization of some students within the school system (Capper, 2019; Eizadirad et al., 2022; Safir & Dugan, 2021). The board of trustees oversees one employee, the director of education (see Appendix A). The director of education implements the trustee-approved multi-year strategic plan. The current CCSB plan includes a focus on actions to address inequities faced by Indigenous students. The plan also calls for strategies to support equity-deserving groups including Black students, other racialized students, and members of the 2SLGBTQ+ community. The plans do not currently address the loss of support and resources when a student leaves publicly funded education.

The director leads the senior leadership team of ten superintendents tasked with implementing the multi-year strategic plan (see Appendix A). The academic superintendents lead a central department and a family of schools consisting of elementary and secondary schools. The board's model of distributed leadership allows for a division of responsibility amongst the executive team while maximizing the strengths of each superintendent (A. Harris, 2014; Hickie, 2021; Tandon, 2022). This type of structure allows for both a system level perspective and an understanding of the connectedness within the system (Fullan, 2019). Academic superintendents are each responsible for overseeing the school student achievement plan developed by the school principal and their staff. Coherence across the district occurs through alignment of school student achievement plans with the board plan. Central leadership staff adopt a distributed leadership

model as an effective means of working in a complex environment (Anderson & Sun, 2017; Carson et al., 2007; Fernandez & Shaw, 2020; Hartley, 2007). The district has an established history of providing agency to central leaders guided by a department superintendent.

### **Leadership Structures**

Addressing a complex PoP that involves challenging the status quo benefits from transformative leadership (Shields, 2010; Shields & Hesbol, 2020). The opportunity for each superintendent to reinforce the key priorities and strategies with principals and leaders from their departments provides for system coherence with change initiatives (A. Harris, 2014; Hartley, 2007; Ho & Ng, 2017). The district provides a level of autonomy to school principals in leading their school student achievement plan. The PoP situates at the intersection of board and school student achievement plans and thus benefits from both transformative and distributed leadership practices. Transformative and distributed leadership practices and their impact on the PoP will be furthered explored in chapter two.

A central coherence committee and an interdepartmental leadership committee purposefully share practices across the district (see Appendix B). These structures allow for both a system level perspective and an understanding of the connectedness with internal and external networks (Fullan, 2019). The established coherence framework (see Appendix C) provides a structure for system-wide change using the district's existing deep learning framework (Fullan et al., 2018). The CCSB focus on coherence includes leaders' shared understanding of the need to (1) focus direction, (2) cultivate collaborative cultures, (3) deepen learning, and (4) secure accountability (Fullan & Quinn, 2016).

These organizational structures will help address the PoP from a systems perspective by promoting leadership from all levels of the district (Fullan & Quinn, 2016). The existing praxis



of distributed leadership provides multiple change leaders to address the PoP. The superintendents have traditionally focused transformative leadership at the macro level of the organization, while distributed leadership by school principals is evident at both the meso and micro levels.

### **Vision and Future State – Equity and Decolonization**

A key component of leading change is creating a vision for change (Bolman & Deal, 2017; Deszca et al., 2020; Elsan-Mansaray, 2019; Fullan, 2023; Khalifa et al., 2016). Transformative change requires a shared vision across the district (Klempin & Karp, 2018; Shields, 2020). Leading change requires that I share the vision of a preferred future state, along with multiple change leaders sharing a consistent vision throughout the entire district (Men et al., 2020; Page & Schoder, 2018; Paine et al., 2023). In order to challenge the status quo, these leaders will ensure that racialized and marginalized students have a platform to share their experiences (Safir & Dugan, 2021; Salisbury et al., 2023). This coherence and system level leadership will result in change leaders finding synergy from Catholic social teachings and social justice through their transformative leadership practices (Chunoo et al., 2020).

### **PESTEL-SWOT Analysis**

Several authors have advocated for a combined PESTEL and SWOT analysis to capture both internal and external impacts on an organization (Benzaghta et al., 2021; Buye, 2021; Dinçer & Yüksel, 2020; Musa & Suryono, 2022; Packard, 2021; Tsangas et al., 2019; Y. Wu, 2020). A PESTEL analysis describes political, economic, social, technological, environmental, and legal factors that affect the district and its ability to challenge the status quo (Deszca et al., 2020; Packard, 2021).

The SWOT analysis outlines the strengths, weaknesses, opportunities, and threats to help assess a district's need or opportunity to change (Benzaghta et al., 2021; David et al., 2019; Gürel, 2017; Packard, 2021). A PESTEL-SWOT analysis assists leaders in considering how the internal and external factors of the organization influence the ability to move towards a desired future state.

As seen in Appendix D, the CCSB has political stability after a recent provincial election and commitment to support equity and decolonization. Addressing the PoP has positive economic benefits through increased enrolment and resulting increases in revenue. Leaders will need to be cognizant of the possible negative social impacts and possible reputational damage as the reasons for parents selecting homeschooling are uncovered. For example, if parents are leaving the CCSB due to a perception of the district being too liberal, other conservative Catholics may choose to follow suit.

Technologically, the CCSB can provide more alternatives to homeschoolers given the successful implementation of two virtual schools. Leaders will need to consider the external environment, as recent public protests at the district have surfaced the opposition by some groups, to various facets of equity work. The last area of the PESTEL analysis, as noted in Appendix D, is the existing legal requirements to follow any changes in governance related to homeschooling that the provincial ministry of education could choose to implement.

The PESTEL-SWOT analysis has highlighted several internal and external impacts on the organization. The next section will further situate the PoP within my leadership agency and the organizational context of the CCSB.

## **Leadership Problem of Practice**

Many districts from across the country face a similar complex challenge of students choosing to leave publicly funded education. As the director of education of the CCSB, I want to address the PoP to ensure an equitable publicly funded school system is available to all students, not just for the majority that fit within the existing school structures. This aligns with my positionality and Catholic values focus on the dignity of each student. Coherence is evident as the members of the senior team share the Catholic value that focuses on individual dignity.

### **Situating the Problem of Practice - Context**

There has been an increasing trend in both the United States and Canada of parents selecting homeschooling for their children (Cervone, 2017; Duvall, 2021; Gaither, 2017; Kunzman & Gaither, 2020; MacPherson, 2022; Neuman, 2019; Ray, 2019a, 2022; Valiente et al., 2022). For this DiP, homeschooling is “an alternative method of learning that takes place outside the public or private/independent school environment. Parents choosing home-schooling have the primary responsibility of managing, delivering and supervising their children's courses and programs of learning” (Statistics Canada, 2022a, Note to Readers section).

In 2020-2021, there were 83,784 students homeschooled in Canada (Statistics Canada, 2022b). According to the Fraser Institute, every province has seen an increase in homeschooling, which doubled from 0.3% of K-12 enrollment in 2006 to 0.6% enrollment in 2019-2020 (MacPherson, 2022). In the United States, there were approximately 3.1 million homeschooled students in 2021-2022, or about 6% of total enrollment in K-12 (Ray, 2022). While the 0.6% may seem negligible to some, my world lens and Catholic values, lead me to focus on the dignity of each student that is not currently meeting with success in publicly funded education.

The trend of increased homeschooling is of interest to policymakers and administrators. At the policy level, the trend may signal dissatisfaction with current publicly funded education (Asadolahi et al., 2022; Bosetti et al., 2017; Gaither, 2017; Kunzman & Gaither, 2020; McFall, 2020; Neuman, 2019; Valiente et al., 2022). At the district and school level, the trend results in loss of provincial funding and inequity of school choice, especially for those from underserved marginalized communities (Dennison et al., 2020; MacPherson, 2022; M. D. Stewart, 2020; Winton & Parekh, 2020), and lost opportunity to share the tenets of Catholic faith (Bosetti & Van Pelt, 2017; Chapman, 2014; Kostoff, 2019). British Columbia, Alberta and Saskatchewan are the only provinces that offer government funding for homeschooling (Bosetti & Van Pelt, 2017; Macpherson, 2022). Homeschooling across Canada results in annual cost avoidance of \$256.4 million dollars (Van Pelt, 2015). In some provinces, the cost avoidance is the difference between the lower per-pupil funding for homeschooling versus the higher per-pupil amount for those attending school. This includes \$60 million dollars in annual savings in Ontario where there is no financial support offered to families who choose to remove their children from publicly funded education. In the United States, the cost avoidance is \$56 billion yearly (Ray, 2022).

Compounding the trend of increased homeschooling is the overall heterogeneity of homeschooling populations. Current research has shown that the reasons for homeschooling are no longer solely for religious ideologies but include both a desire for improved flexibility for family circumstances and a means of avoiding negative school experiences (Gaither, 2009; Kunzman & Gaither, 2020; Prichard & Swezey, 2016; Van Pelt, 2015).

Along with the board of trustees, I set the direction for the board including a transformative vision of reform that challenges the status quo practices and structures that may

contribute to students from marginalized communities choosing homeschooling. The PoP to address in this DiP is how school and board organizational structures and processes can be more flexible to address individual family needs, thus decreasing families selecting homeschooling.

Through critical theory, this DiP will expand on the transformative leadership actions needed to transform the CCSB to a desired future state. The future state will include opportunities for students and their families to personalize learning from home with learning at school. Some students may forego assessments and progress through the system with decolonized personal measures of success (Absolon, 2019; Battiste, 2013; Csontos, 2019; Khalifa et al., 2019; Styres, 2017). Students may choose to attend part of each day, alternate days, or any other option that best allows them to balance their personal situations. A more flexible school system may provide opportunities for authentic experiences beyond those delivered within publicly funded education.

The remaining components of chapter one of the DiP will frame the PoP based on critical theory and social constructivism, along with complexity theory and both transformative and distributed leadership. Guiding questions that emerge from the PoP and the leadership-focused vision for change will complete the first chapter of the DiP.

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

This section provides a historical overview of the PoP along with a conceptual framework that will inform the DiP. The framework considers both my positionality and my work as a scholar activist to address oppression and power imbalances within the PoP.

### **Historical Overview**

The trend of an increase in parents selecting homeschooling has been well documented (Kunzman & Gaither, 2020; MacPherson, 2022; Neuman, 2019; Statistics Canada, 2021;

Valiente et al., 2022; Zwaagstra et al., 2023). Van Galen's seminal 1988 research resulted in binary categories of motivations for homeschooling based on either ideological reasons or pedagogical reasons (Van Galen, 1988). Ideological reasons tended to focus on fundamentalist religious beliefs while pedagogical reasons focused on the belief that children would be disadvantaged if they followed the traditional school teaching practices.

New categories have emerged along with the growth of homeschooling and the diversity of reasons for selecting homeschooling (Bosetti et al., 2017; Green-Hennessy & Mariotti, 2021; Jolly & Matthews, 2020). A growing area of research related to homeschooled children includes parents who have withdrawn their child from school to protect them from bullying (Bauer, 2018; Duvall, 2021; Hirsh, 2019; McQuiggan & Megra, 2017; Redford et al., 2017; Smetak, 2019). Multiple researchers have found that protection against racism is a contributing factor for racialized families that select homeschooling (Hirsh, 2019; Mazama, 2016; Mazama & Lundy, 2015; Posey-Maddox et al., 2021; Puga, 2019; Ray, 2017; Smetak, 2019; M. D. Stewart, 2020). Recent research concluded that during COVID there was an increase in homeschooling to address health and safety concerns (Fontenelle-Tereshchuk, 2021, Hargreaves, 2021; Letzel et al., 2020; McFall, 2020; Pokhrel & Chhetri, 2021; Valiente et al., 2022).

Considering current research, factors such as COVID, and the realities of intersectionality, four themes emerged as motivation for choosing homeschooling. These include: (a) Equity motivations including conflicts arising from racism; (b) Pragmatic motivations and conflict between home and school demands; (c) Safety motivations including conflicts with school staff related to bullying or a lack of support for students with special needs, and (d) Religious reasons including values and ideology conflicts.

A limitation of these findings is the inaccuracy of homeschool reporting from one jurisdiction to another given the various definitions of homeschooling (Coleman & McCracken, 2020; Green-Hennessy & Mariotti, 2021). A second limitation of earlier studies of homeschooling is a lack of focus on the diversity within homeschooling and research based primarily on White perspectives (Van Pelt, 2015; Williams-Johnson & Fields-Smith, 2022).

The CCSB is a high performing district, regularly outperforming the province in all areas of standardized testing as measured by the Education Quality and Accountability office (EQAO). Given the positive outcomes for the district, why worry about students that choose homeschooling? From a colonial perspective, I recognize that large-scale assessments may have widespread negative effects related to well-being and equity (C. Campbell, 2021; Eizadirad, 2019; Hargreaves, 2020). It took the pandemic for districts to recognize the disproportionate impact of homeschooling on students from underserved marginalized communities (Banerjee & Thomas, 2022; Kemei et al. 2023; Lam et al., 2023; Mensah & Williams, 2022; Viana, 2023).

In response to the earlier rhetorical question of why care about students that are homeschooled, I refer to my positionality and Catholic values that focus on the dignity of each student. The collective provincial focus on big data such as EQAO results has resulted in a myopia that devalues those that are missing from these results. I prefer to focus on each student's uniqueness, culture, and potential; not the hegemonic view of repairing those that do not meet the established norms by the governing party of the day (Khalifa et al., 2019; Safir & Dugan, 2021).

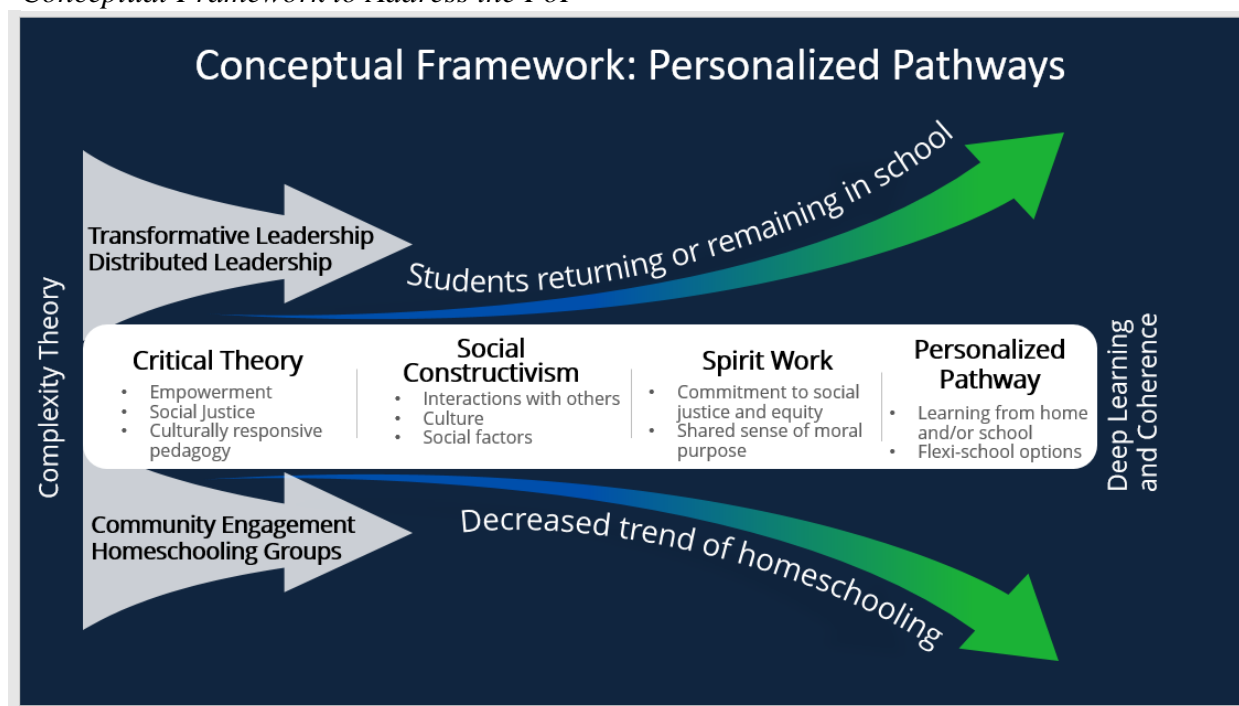
### **Conceptual Framework**

A conceptual framework provides a way to consider the PoP with a desired future state for the CCSB. The following section will further explore the intersection of theory and practice.

Figure 1 outlines how the DiP frames and explores the PoP based on theories of practice that are consistent with my agency and my positionality. It shows the desired future state of personalized pathways for homeschoolers that may include learning from home and offering flexible options for students to select from within the publicly funded school system. Two possible impacts on the PoP include students that were homeschooled that return to public education, and those that were considering leaving that now choose to remain. I posit that addressing the PoP within the context of the conceptual framework may result in less students choosing to leave publicly funded education for home schooling. I also believe that more students will return from homeschooling to take advantage of personalized pathways unique to their particular needs and family situations.

**Figure 1**

*Conceptual Framework to Address the PoP*



*Note.* This figure highlights actions and approaches to decrease the rate of homeschooling.



## **Complexity Theory**

Complexity theory perspectives allow for a cogent view of the PoP, given the likelihood of multiple reasons for parents choosing homeschooling. Complexity theory offers a sophisticated means to explore and understand the interconnectivity amongst internal and external actors, along with the organization being adaptive to the needs of all actors (Crevani et al., 2021; Uhl-Bien, 2021; Uhl-Bien & Arena, 2017). Complexity theory is an important frame for addressing the PoP given the internal and external interactions and resulting need for adaptive solutions (Benzaghta et al., 2021; Byrne & Callaghan, 2022; Turner & Baker, 2019; Uhl-Bien, 2021; Uhl-Bien & Arena, 2017).

External actors including homeschool associations, parent diversity organizations, local unions, and others, will need to be part of the change process (see Appendix B). It is important to consider the needs of the external actors so that they may become champions of the change process rather than resistors to change (Armenakis et al., 2011; Deszca et al., 2020; Helfat, 2022; Hodges, 2021; Hueske et al., 2015; L. K. Lewis, 2019; Shmatko et al., 2018).

## **Critical Theory and Social Constructivism**

A critical theory perspective necessitates consideration of the power dynamics of leadership, change, and decision-making and the resulting oppression and marginalization of some students. An analysis of structures and processes from a critical theory viewpoint must consider culturally responsive pedagogies. Research shows that empowering students from underserved marginalized communities will promote their agency with an ideal social justice outcome (Cataldo, 2022; Khalifa, 2018; Ladson-Billings, 2021; Vasquez, 2021).

Similar to critical theory, social constructivism can challenge the current status quo through a more participatory process (Jung, 2019; Omodan, 2022; Pfadenhauer & Knoblauch,

2019; Van Hover & Hicks, 2017). Given the multitude of reasons for selecting homeschooling, a social constructivism approach will provide a lens that is reflective of students' lived experience, shaped by their social interactions and their unique culture of community. Cultural norms and values along with social interactions will shape ways of addressing the PoP from the lens of those impacted by hegemonic culture.

### **Spirit Work, Deep Learning, and Coherence**

A shared moral purpose of wellbeing for all, or spirit work, provides a system-wide lens for addressing the increased trend of homeschooling (Burmicky & Hartman, 2023; Fullan & Edwards, 2021; Gélinas-Proulx & Shields, 2022; Makaiau et al., 2023; Rincón-Gallardo, 2020; Tapia-Fuselier, 2023). A commitment to social justice will bring coherence to addressing the PoP. The district's current use of the coherence framework (Fullan & Quinn, 2016) and deep learning framework (Fullan et al., 2018) will leverage existing structures within which to address the PoP. Leveraging the agency of system leaders will assist staff in understanding that when a student leaves publicly funded school in Ontario, they no longer receive any support or resources from the Ontario ministry of education. Providing flexible options to families will help to ensure that every child continues to have access to resources and support.

### **Personalized Pathways**

The DiP explores possible solutions to decrease the trend of parents selecting homeschooling for their child instead of selecting publicly funded education. A critical theory lens applied to the PoP necessitates changes in structures or processes that lead to a transformed organization, and by doing so, challenges the status quo (Gillie, 2022; Poultney & Anderson, 2021; Ray, 2019a; Schafer & Khan, 2017; te Riele et al., 2017). Chapter two explores solutions to address the PoP based on personalized pathways that reflect each student's unique needs.

Ultimately, a range of possible options will be generated that may result in a personalized pathway that decreases the trend of homeschooling and lead to wellbeing and student achievement. Focused on social justice and challenging the status quo, a transformative leadership approach will inform the analysis. Distributed leadership will be required to achieve coherence across the CCSB given the spread of homeschooling across the region and the important leadership role of principals (Cotton, 2004; Grissom et al., 2021; Leithwood et al., 2020; Seashore-Louis et al., 2010; Sebastian & Allensworth, 2019; Sudarman et al., 2021; H. Wu & Shen, 2022).

The conceptual framework provides a concise view of the intersection of theory with the practices to address the PoP. Chapter two of the DiP will further explore transformative and distributed leadership. The next section focuses on guiding questions that inform the PoP.

### **Guiding Questions Emerging From the Problem of Practice**

An analysis of the PoP from both a critical lens and a social constructivist approach has resulted in three guiding questions. This section of the DiP looks at each of the guiding questions and the resulting considerations that will inform the change process, possible solutions, implementation and evaluation.

### **Student Voice and Agency**

Traditionally, the voices of those from underserved marginalized communities have been silent or silenced by those with the agency to challenge the status quo (Battiste, 2000; Galletta et al., 2019; Gonzalez et al., 2017; Ishimaru & Takahashi, 2017; Safir & Dugan, 2021; Salisbury et al. 2023; Sharratt & Fullan, 2022; Walter et al., 2021; Zion, 2020). Students and parents from underserved marginalized communities should have a variety of culturally appropriate input opportunities. For example, it may not be appropriate to send an anonymous school Google

survey to a community elder. It may be appropriate to offer tobacco to an elder to show respect and gratitude for the time that they will spend sharing details of why some in their community choose to homeschool their children. For others that have selected to homeschool they may welcome an opportunity to fill out a digital survey to provide input as to the personalized schooling that would work for their unique situation. How will the change process include the voices of homeschooled students from underserved marginalized communities? This question will help guide the DiP process.

Moving from large data to small data (Safir & Dugan, 2021; Sahlberg, 2017, 2018) along with personalized stories that are respective of cultural differences may be a motivating factor in addressing the PoP. Personal stories can fortify the collective vision of a greater moral purpose that focuses on the dignity of each student. These stories will be important aspects of student voice and agency.

### **Micro, Meso, and Macro Coherence**

The challenge of addressing the trend of increased selection of homeschooling will require strategies at the micro, meso, and macro level. I consider the macro level as Board policies, procedures, and work at the governance level with trustees and the ministry of education. My primary agency lies at this macro level. The meso level is the leadership organization structures such as the executive council, central leadership teams, and principal or family of school groupings. My ancillary agency is at the meso level given my involvement in numerous district committees. The micro level is the individual educator, external actor, or leader throughout the district and the community.

At the micro level, individuals such as guidance counsellors, principals, vice-principals, and others involved in the registration process must understand the new options and structures available to students that traditionally left publicly funded school for homeschooling.

At the meso level, the district's existing structures including the Catholic leading learners committee, the interdepartmental leadership team, and the Indigenous education advisory committee (see Appendix B), will all need to understand the new options available to students who might otherwise select homeschooling.

At the macro level, the board of trustees need to ensure that policies and procedures are in place to remove any barriers that would prevent challenging the status quo structure of a publicly funded school system.

Intentional leadership strategies that consider the leader relationships at each level of the district and their understanding of a shared vision and purpose will affect the success of reaching the desired future state of the PoP (Constantinides, 2021; Harden et al., 2020; Higgs et al., 2023; A. Roberts, 2020; Vaugh et al., 2022; T. Wang et al., 2023). How can the district's existing focus on coherence assist in micro, meso, and macro changes? This question will help guide the DiP process.

### **Minimizing Barriers**

A key aspect of addressing the PoP is framing the issue from a critical theory perspective. Doing so immediately focuses attention on the power imbalances that have resulted in preservation of the status quo and resulting oppression (Capper, 2019; Khalifa, 2018; Stetsenko, 2020). Using my agency to create a shared vision of a desired future state will provide staff with a clear indication of support for the changes to create a more flexible school system. In order to address barriers, including structural and systemic racism across the entire district, multiple

change agents need to work from a system perspective (Benson et al., 2023; Galloway et al., 2019; M. M. Lewis et al., 2023; Lopez & Jean-Marie, 2021). Transformative leadership approaches will also assist in addressing resistance to race related discussions that may be a factor in some parents selecting homeschooling for their children (Bajaj, 2018; Inandi et al., 2013; Murray-Johnson & Guerra, 2018). How can leaders minimize barriers to change that protect the current status quo structures and processes in publicly funded education? This question will help to guide the DiP process.

Addressing these key questions will be part of the iterative process of change implementation explored through this DiP.

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

A leader must not only set the vision for the organization; they must also articulate the vision. (Bolman & Deal, 2017; Deszca et al., 2020; Elsan-Mansaray, 2019; Fullan, 2023; Khalifa, 2020; Klempin & Karp, 2018; Krug et al., 2020; Shields, 2020). This section sets the vision for change I will articulate across the CCSB to address the PoP. This section of the DiP addresses key gaps between the current and the desired future state. Leadership considerations at the micro, meso, and macro level of the organization will conclude this section.

### **Vision for Change**

The vision that I have for the CCSB is one where all students benefit from attending publicly funded education. The trend of parents selecting homeschooling will decrease and students that had previously left the CCSB will begin to re-engage with a personalized version of education. Staff across the CCSB will share a common focus on the dignity of each child, respecting each student's selected personalized approach to publicly funded education. Staff at all levels of the district will see the value of learning partnerships with elders, with families, and

with members of cultural organizations that are able to share their rich history and culture with students. A decolonized education system will place value on students' right to self-determination of future aspirations that may or may not include grades or a graduation diploma (Barrero-Jaramilo, 2023; Battiste, 2013; Eizadirad, 2019; Lopez, 2021; Louie & Prince, 2023; Mullen, 2023).

Flexible school structures will be available to every student at their community school. Each student will know that they belong and are welcomed in Catholic schools, regardless of their economic, political, cultural, racial, social, religious, or gender identity. Students are welcomed with respect, curiosity, and a collective quest to learn more about the intersectionality that makes them unique. Learning becomes a shared community process based on each student's passion and not bound by time, space, and limited resources.

### **Gap Between Present and Future State**

Providing students with flexible options for school requires changes to admission practices. Students should be able to attend school on a schedule that works for them whether that be half days, or alternate days or a certain numbers of days per week. Current practices at most CCSB schools require students to register for a minimum of a half-time schedule.

Most parents who select homeschooling believe that they must withdraw their child from the CCSB to participate in homeschooling. In the future state, parents will know that they can choose to homeschool for part of the day and have their child participate in a combination of eLearning asynchronous learning, synchronous virtual school, or in-person classes for the other portion of the day.

Most educators in the CCSB see the colonial practice of working towards an Ontario Secondary School Diploma (OSSD) as the most viable pathway for students (Barrero-Jaramillo,

2023; Canadian Council on Learning, 2007; Haynes-Writer, 2017; Louie & Gereluk, 2021; Mullen, 2023; Nelson, 2024). A transformative culture change is needed for educators to recognize that students attending many Indigenous schools, private schools, and homeschools, go on to attend post-secondary schools without an OSSD. A parent who decides that their child will continue in publicly funded education but will not be pursuing a secondary school diploma, will decide which subjects or courses they wish their child to access. From my agency as director of education, I recognize the challenge of transformative change within the restrictions of existing ministry of education policies. Despite this challenge, this DiP explores ways to address the PoP through the creation of more flexible structures and processes within existing ministry of education policies.

I posit that some students left the school system due to anxiety or other stresses associated with assessment practices (Kunzman & Gaither, 2020; Prichard & Swezey, 2016; Van Pelt, 2015). In the future state, a student could choose to take part in school but not participate in the assessment practices. In elementary school this student would still progress with their age-appropriate peers; however, once they transition to high school, they currently would not be able to progress without participating in traditional assessments. In a desired future state based on personalization, they may choose not to pursue an OSSD; however, they could still be active participants in all other areas of the curriculum and class.

### **Improved Conditions**

The scope of this DiP is to look at the trend of increased numbers of students choosing homeschooling instead of publicly funded education. Beyond this scope, more flexible school options could benefit students that left publicly funded schools for private schools and those that are not attending school at all.



A challenge to colonial practices and traditional school restrictions will benefit many students who continue in the publicly funded school system. For example, not all families that are dissatisfied with publicly funded education are able to homeschool their child. Others may have a child dealing with mental health challenges that would benefit from modified structures available in a more flexible school system.

Rather than viewed as an alternate type of program that may bring with it negative connotations and stereotypes, transformative shifts would see flexible schools as the next evolution of publicly funded education to a more personalized approach to meet the needs of all students. Challenging existing inequities in the system elevates the student, their family, their identity and affirms the unique gifts they bring to their schools (Safir & Dugan, 2021).

### **Priorities for Change**

One of the first priorities, or drivers for change, is for staff across the system to understand why there is a need for change. From a critical theory and transformative leadership approach, it is important that staff see social justice as a key reason and outcome of the desired future state (Chunoo et al., 2019; Gélinas-Proulx & Shields, 2022; Kowalchuk, 2019; Shields, 2020; Torrance et al., 2021; F. Wang, 2018; Warner, 2020; Whitaker, 2022).

CCSB schools have existing student achievement plans that align with the CCSB strategic plan that focuses on equity, inclusion, and well-being of all students. Using small data (Goldkind et al., 2018; Safir & Dugan, 2021; Sahlberg, 2017, 2018) to share stories of Indigenous students, racialized students or others from underserved marginalized communities who left the CCSB will provide meaningful examples of why schools and the system are not currently meeting the needs of all students.

This approach to prioritizing the why for change is consistent with the CCSB's messaging and efforts to hire more racialized staff. As an example of this focus, the district now requires administrators taking part on an interview panel to have completed anti-bias interview training. Research shows that a lack of diverse staff in schools has resulted in racialized, Indigenous, and 2SLGBTQ+ students feeling marginalized with some choosing to leave publicly funded education (Bosetti & Van Pelt, 2017; Prichard & Swezey, 2016; Ray, 2015, 2017; Valiente et al., 2022; Van Pelt, 2015). A focus on the spirit work and creating a vision of a greater moral purpose to support all students will prioritize the needed transformative future state (Azorín & Fullan, 2022; Deszca et al., 2020; Drago-Severson & Blum-DeStefano, 2018; Fullan & Edwards, 2021; Rincón-Gallardo, 2020). Establishing an understanding of the needed change across the system is an immediate short-term goal.

### **Leadership Considerations**

My agency positions me in a privileged position to have an impact at the macro level of the organization. My regular interactions with the board of trustees provides an avenue to policy and procedural changes that can affect the status quo. As director of education, I have an opportunity to engage with ministry of education staff, and to connect with other jurisdictions across Canada.

My agency and positive working relationship with my colleagues at the executive council provide an opportunity to share and influence a vision for change at the meso level. The CCSB's existing structures that focus on coherence benefit from the ability of senior leaders to access distributed leadership practices across the district. These existing relationships and interconnectedness are important for system change across each school and each department

(Deszca et al., 2020; Fullan, 2019, 2020; Fullan & Quinn, 2024; Shields, 2020; Van Gilder et al., 2024).

At the micro level, internal and external actors need to focus on distributed leadership practices. For example, the union leaders need to understand how the changes focus on students but at the same time address any concerns for job security. Homeschool association leads need to know the opportunities that exist to support their children while respecting their rights to continue to choose to homeschool. This is especially important in Ontario where students who leave publicly funded education do not receive any funding or resources (MacPherson, 2022).

### **Chapter 1 Conclusion**

The first chapter of the DiP established my positionality along with my personal leadership position and agency. My Catholic values and leadership approaches are in alignment with the organizational context of the CCSB and its governance structure. The complex PoP involves the trend of an increasing number of parents selecting homeschooling instead of publicly funded education. A conceptual framework established complexity theory, critical theory and social constructivism as ways to view power, hegemony, and oppression as factors leading to the current challenges in the CCSB. A historical overview of the PoP included current research outlining reasons that families are selecting homeschooling. Guiding questions and a leadership-focused vision for change completed this section of the DiP.

In the next chapter, the DiP will focus on the planning, development and leadership actions involved in the change process. Chapter two will conclude with recommended solutions to address the PoP.

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

In order to address the trend of increased numbers of parents selecting homeschooling for their children, leadership actions will be needed that address the current state of oppression and marginalization felt by some students in publicly funded schools. Transformative leadership actions to address the PoP through a critical theory lens focus on social justice to disrupt the current structures and processes. Distributed leadership actions involved in the change process reflect a social constructivist approach to change. These approaches to framing the PoP are complementary as both aim to achieve a more inclusive and equitable education system.

This chapter of the DiP expands on leadership practices applied within a change framework with the goal of moving towards a future state of more flexible schooling options for students within the CCSB. Chapter two is comprised of the following five sections: (a) leadership approach to change, (b) framework for leading the change process, (c) organizational change readiness, (d) leadership ethics in organizational change, and (e) strategies/solutions to address the problem of practice.

### **Leadership Approach to Change**

I have utilized both transformational and transformative leadership practices in my various leadership roles at the CCSB. Transformational leaders focus on school or district improvement, largely within existing structures, (Leithwood & Jantzi, 2006; Leithwood et al., 2019; Toprak et al., 2023). Transformative school leaders focus on what schools might be like through the disruption of the status quo (Hewitt et al., 2014; Shields, 2020, 2021, 2022; Shields & Hesbol, 2020). Transformative leadership focuses on power imbalances, equity, social justice, oppression and marginalization (Shields, 2020; Tapia-Fuselier, 2023).

The Ontario Leadership Framework (OLF) has inculcated leadership practices for Ontario education leaders over the past decade (Hitt & Tucker, 2016; Leithwood, 2021; Leithwood et al., 2019). The OLF includes five core leadership capacities: (a) setting goals, (b) aligning resource with priorities, (c) promoting collaborative learning cultures, (d) using data, and (e) engaging in courageous conversations (Ontario Institute for Educational Leadership, 2013). The foundation for the framework is largely the work of Ken Leithwood incorporating transformational leadership practices (Gélinas-Proulx & Shields, 2022; Hitt & Tucker, 2016; Leithwood, 2021).

Critiques of the OLF include the omission of social justice work and reliance on organizational change that does not challenge the inequities of current education structures (Gélinas-Proulx & Shields, 2022; Kowalchuk, 2017; Riveros et al., 2016; Shah et al., 2022a). I acknowledge that the OLF is the dominant leadership framework in Ontario; however, I focus on transformative and distributed leadership practices, rather than transformational practices that may not challenge the dominant structures of publicly funded education.

### **Transformative Leadership**

The change process in the CCSB is based on Dr. Michael Fullan's work including using the group to change the group (Fullan, 2019); and creating the structures to create coherence across the district (Fullan & Gallagher, 2020; Fullan & Quinn, 2016). The existing coherence framework in the CCSB provides a comprehensive system to frame change initiatives.

Coherence begins with strategic leadership practices that are intentional and focus on future direction. As a transformative leader, I espouse that changing culture is more important than changing policy (Esquierdo-Leal & Houmanfar, 2021; Fullan, 2020; Fullan & Gallagher, 2020; Gümüş et al., 2021; Khalifa, 2020). This belief informs the change process and focus on

relationships when leading change in the district. This is congruous with my belief that staff need to see social justice as a key outcome for the future state when addressing the PoP. As a transformative leader looking to signal a need for structural change, I will focus on the shared moral purpose and commitment to Catholic social teachings and social justice (Fullan & Edwards, 2021; Osguthorpe & Jensen, 2023).

### **Tenets of Transformative Leadership**

Shield's (2020) eight tenets of transformative leadership provide guidance to address the PoP from a position grounded in critical theory and social justice while addressing power, equity, and oppression. Table 1 highlights each of the eight leadership tenets as they relate to the PoP of students leaving publicly funded education for homeschooling.

**Table 1**

#### *Tenets of Transformative Leadership*

Tenet	Consideration for Change Process
1. Mandate to effect deep and equitable change	Transformative leadership vision
2. Deconstruct and reconstruct knowledge frameworks	Movement towards 3 <sup>rd</sup> order change
3. Address inequitable distribution of power	Consider homeschoolers from underserved marginalized communities
4. Emphasis on both private and public good	Connection to common good and spirit work
5. Focus on emancipation, democracy, equity, and justice	Critical theory lens applied to all aspects of the change process
6. Emphasis on interdependence, interconnectedness and global awareness	Aligns with the CCSB focus on coherence
7. Necessity of balancing critique with promise	Complexity theory and need to be adaptive
8. Call to exhibit moral courage	Transformative leadership disrupts the status quo and redistributes power

*Note.* Adapted from “*Becoming a transformative leader: A guide to creating equitable schools*,”

by C.M. Shields, 2020, Routledge, p. xii, (<https://doi->

[org.proxy1.lib.uwo.ca/10.4324/9780429261091](https://doi-org.proxy1.lib.uwo.ca/10.4324/9780429261091)).

A challenge for many leaders is moving beyond transformational change to focus on structural and third-order change. Third-order change results when staff experience disequilibrium challenging old ways of operating, as new ways emerge (Candelarie, 2023). Deconstructing and then reconstructing knowledge is a stance inherent to transformative leadership that will assist in reaching third-order change (A. M. Ryan & Watson, 2021; Shields & Hesbol, 2020). System third-order change and culture change may result in a more flexible school system with new structures that benefit the personal learning of students who had previously selected homeschooling. The next section will look at the micro level and the impact of distributed leadership across the CCSB.

### **Distributed Leadership**

A question posed in chapter one was, “How can leaders minimize barriers to change that protect the current status quo structures and processes in publicly funded education?” Distributed leadership that maximizes the skills of numerous leaders across the system is one way to minimize these barriers while addressing the complexity of the PoP (Carson et al., 2007; Garcia-Torres, 2019; Hickie, 2021; Kortantamer, 2023; Tandon, 2022). A significant body of research exists that concludes the important role of the school principal in school reform and improvement (Grissom et al., 2021; Leithwood et al., 2020; Sebastian & Allensworth, 2019; Sudarman et al., 2021; H. Wu & Shen, 2022). Given the important role that school principals serve in the change process, individual school principals should understand the shared vision of the future desired state for the CCSB to address the PoP system-wide.

### **Agency and the Change Process**

The CCSB has an established culture and structure that recognizes and encourages distributed leadership. I posit that the combination of transformative leadership practices to guide

the change process, along with distributed leadership to achieve coherence, will result in the desired changes across the district. The CCSB has school and board level improvement goals that focus on social justice and equity, both key tenets of transformative leadership. As the director of education, I have the agency to influence the change process through transformative leadership practices; recognizing the importance of then ensuring distributive leadership practices are in place to guide the change process at all levels of the district.

The next section will look at a hybrid framework for leading the change process based on the change path model (Deszca et al., 2020) and Edgar Schein's three levels of culture model (Schein & Schein, 2017).

### **Framework for Leading the Change Process**

Many school leaders feel unprepared to manage the complexities of the change process while also leading and managing their schools (Acton, 2021; Fullan, 2023; Mansaray, 2019; Usman, 2020). A framework for leading the change process provides a structure that will assist leaders in guiding the change process as they collectively address the PoP as outlined in this DiP (Deszca et al., 2020; Galli, 2018; Garets & Eastman, 2021; Harrison et al., 2021).

### **Change Path Model**

Several change management models including Lewin's three-step model (Burnes, 2020), Kotter's eight stages of organizational change (Kotter, 1995; Pollack & Pollack; 2014), and the change path model, (Deszca et al., 2020) may assist staff with the change management process. As a newer model, the authors of the change path model have built upon the work of Kotter, Lewin and others with a balance of change processes while also providing macro level direction for organizational change (Deszca et al., 2020). The macro level focus is of interest to me as this is where I focus my transformative leadership efforts. The selection of the change path model



provides a structured approach to address the PoP while also having flexibility to support school level and district level change.

The model consists of four stages: (a) awakening, (b) mobilization, (c) acceleration, and (d) institutionalization (Deszca et al., 2020). I will work with the executive team of superintendents and with an implementation team of central leaders to implement the change process framed by the four phases of the change path model. This approach will address micro, macro, and meso level changes across the district. The implementation team will also consider organization culture throughout the change process.

### **Three Levels of Culture Model**

Edgar Schein's three levels of culture model provides a means to look at cultural analysis (Schein & Schein, 2017). Schein's change model utilizes the following dynamic definition of culture:

The culture of a group can be defined as the accumulated shared learning of that group as it solves its problems of external adaptation and internal integration; which has worked well enough to be considered valid and, therefore, to be taught to new members as the correct way to perceive think, feel, and behave in relation to those problems. This accumulated learning is a pattern or system of beliefs, values, and behavioral norms that come to be taken for granted as basic assumptions and eventually drop out of awareness.

(p. 6)

Schein's model, when combined with the change path model, provides a means of planning for change while monitoring relationships and cultural impacts. As shown in Figure 2, combining the three levels of culture with the change path model provides a mechanism to monitor and assess the impact on culture during each phase of the change path model. At the surface level of

change are artifacts that include visible structures and processes. Conveyed goals, values, or aspirations reveal supported beliefs and values. The unconscious beliefs and values that affect behaviour and perception are the basic underlying beliefs or assumptions of culture (Schein & Schein, 2017). This model aligns with my focus on changing culture as a means of achieving institutionalization during the change process. Transformative actions will assist with an intentional focus on third-order change and changing culture by disrupting the status quo. The change process related to the PoP will further embed this equity and decolonization work by deconstructing and reconstructing knowledge to move towards third-order change (A. M. Ryan & Watson, 2021; Shields & Hesbol, 2020). An example would be staff across the CCSB changing their underlying belief that all students must be physically in class to learn.

**Figure 2**

*Hybrid Change Path Model*



Awakening	Identify need for change; Articulate gap from present to future state; Powerful vision for change; Spread awareness and vision
Mobilization	Use structures and systems; Assess power and culture; Communicate need for change system-wide; Leverage change agents
Acceleration	Engage and empower others; Build momentum; Celebrate milestones
Institutionalization	Track desired changes; Develop and deploy new structures

*Note.* Adapted from “*Organizational change: An action-oriented toolkit*,” by G. Deszca, C.

Ingols, & T. F. Cawsey, 2020, SAGE Publications, p. 54 and from “*Organizational culture and leadership*,” by E. H. Schein & P. Schein, 2017, Wiley, p. 18.

## **Organizational Context of Social Justice**

Partner perspectives will inform the awakening phase of the change path model (Deszca et al., 2020). In this phase, the key change leaders including the director of education, the superintendents, and the equity lead will use homeschooling data to highlight the need for change. A vision of the desired future state of more flexible options for families is established. The change leaders will explain the needed change through their various communication networks. Messaging during this awakening phase will align with the district focus to address oppression and marginalization. This focus is consistent with the research that shows some families are looking for more flexibility to transmit values and beliefs unique to their community (Hirsh, 2019; Mazama, 2016; Mazama & Lundy, 2015; Posey-Maddox et al., 202; Puga, 2019; Ray, 2017; M. D. Stewart, 2020).

In the planning stage of this model, there is a need for an unsettling of the status quo. Student affinity groups can share their personal experiences so that staff see the needed changes to ensure well-being for all, or spirit work (Fullan & Edwards, 2021; Rincón-Gallardo, 2020). Spirit work provides a system-wide motivation to address the increased trend of homeschooling. Research has shown that affinity groups can improve feelings of belonging and result in action to address racism (Alicia & Johnson, 2021; Green, 2020; S. Miller & Vaughn, 2023; Oto & Chikkatur, 2019; Tauriac et al., 2013). I posit that in addition to addressing racism, student agency and voice from affinity groups will inspire staff to address the PoP and decrease the trend of increased homeschooling.

The second phase of the change path model is mobilization (Deszca et al., 2020). The district has structures in place, such as families of schools and professional learning networks (see Appendix B) to create coherence through multiple communication channels (Fullan, 2016).

Chapter one explained the district's use of the deep learning framework as their framework for learning and teaching (Fullan et al., 2018). During the mobilization phase, these existing structures and the deep learning framework will facilitate communication explaining why there is a moral imperative to address the increased trend of homeschooling.

The third phase of the change path model is acceleration (Deszca et al., 2020). During this phase, staff will receive support as they look to change structures and processes to allow more flexible school solutions for families. Change leaders will highlight successes where flexi-school options have met the needs of students that were traditionally homeschooled. For example, school principals can share examples of students attending on modified timetables and students attending classes but not taking part in assessments. Building momentum by celebrating success during the acceleration phase is an important component of this change model (Deszca et al., 2020; Hodges, 2021; Magsaysay & Hechanova, 2017; Page & Schoder, 2019).

The final phase of the change path model is institutionalization. Monitoring and evaluation will ensure that solutions to the PoP remain adaptable to both internal and external influences. Data analysis will take place during this phase to validate the desired outcome of a decreased trend of parents selecting homeschooling. CCSB researchers will use board enrolment data to confirm the decrease in the trend of parents selecting homeschooling. This phase will also include adjustments to the implementation plan based on both anecdotal observations, data collection and analysis.

A review of artifacts, espoused values, and underlying beliefs will provide an opportunity to compare different partner commitments to the change. Principal and guidance counsellor focus groups will provide recommended changes to processes and structures. Updated admission processes will clearly articulate the ability for parents to determine attendance schedules that

work for their particular family. Changes to the assessment and evaluation processes will formalize the ability for students to audit courses without taking part in formal assessments. The district's virtual school options will provide a mechanism for more flexibility for students to learn from home according to their personalized learning plan.

The CCSB's coherence committee provides interdepartmental input and monitoring opportunities across all departments. The focus on coherence, when framed with the change path model, provides a systematic approach to change. The intentional planned focus on organization culture throughout each of the phases of the change process will allow iterative adjustments to address the complexities of multiple partners involved in the change process.

### **Organizational Change Readiness**

Organization and individual readiness for change is a critical factor and predictor for the successful implementation of a change initiative (Aboobaker et al., 2022; Erlyani & Suhariadi, 2021; Mathur et al., 2023; Rafferty et al., 2013; T. Wang et al., 2023). This section will look at the readiness for change for the CCSB to implement changes to address the PoP as outlined in this DiP.

### **Readiness for Change**

If a change process is going to be successful, the individuals within the organization must embrace the change. Change leaders should assess the readiness of the organization before implementing the change process (Deszca et al., 2020; Oreg et al., 2011; Rafferty et al., 2013; Smith, 2005; T. Wang et al., 2023). The awakening phase of the change path model establishes the vision of the future state and establishes an understanding of why change is needed (Deszca et al., 2020). Early in this phase of the change process, the change implementation team will need to assess the readiness for change. The change implementation team will include the

director of education as the change initiator, along with other leaders in the district as change facilitators and change implementers (Deszca et al., 2020). This change implementation team will bring a district-wide perspective to determining change readiness (Biech, 2023; Day et al., 2023; Edmondson, 2012). This is important to ensure coherence throughout the change process.

### **Questionnaire**

One way of assessing the organization's readiness for change is for the change implementation team to reflect on the results of a readiness for change questionnaire. Deszca, Ingols, and Cawsey (2020) propose a questionnaire based on the collective work of several authors who have summarized key considerations when implementing change (Holt et al., 2007; Judge & Douglas, 2009; T. A. Stewart, 1994). The following six readiness dimensions are key components of the change readiness questionnaire:

- previous change experience
- executive support
- credible leadership and change champions
- openness to change
- rewards for change
- measures for change and accountability (Deszca et al., 2020)

The district's score on this readiness for change questionnaire (see Appendix E) indicates a high level of readiness for change. Scores on this tool can range from -25 to 50 and the CCSB score at the time of assessment was 37.5, suggesting a high readiness to change.

The district has successful previous experience with change along with executive team support and credible leadership and change leaders. The district has a collective commitment to innovation, as noted in the CCSB's multiyear strategic plan. This commitment to innovation has

provided the basis for regular cycles of innovation or change initiatives within the district coherence structures. For example, the CCSB has implemented technology-based learning including the use of Google Meet to extend the learning environment beyond the traditional classroom. The cycles of innovation are iterations of the CCSB's coherence deep learning framework.

The established innovative culture at the CCSB is one that shows an openness to change. Recognition or rewards for staff that lead change initiatives include public accolades, public awards, and promotion for leaders. Ongoing monitoring of system initiatives occurs by reporting the student achievement plan to the board of trustees and through the collective work of the interdepartmental leadership team and the central coherence committee. Structures such as the central coherence committee and the interdepartmental leadership team provide opportunities for staff voice and direct involvement in the change process. The focus on the staff involvement in the change process is an important component to ensure staff readiness for change (Morrison, 2023; Potnuru et al., 2023; Sahoo & Sharma, 2015).

### **DICE Framework**

The Boston College consulting group created the DICE framework for predicting change success (Boston Consulting Group, n.d.; Deszca et al., 2020; Leng & Wong, 2017; Ortega et al., 2023; Sirkin et al., 2005). The following four critical elements are the foundation for the tool:

- duration
- integrity
- commitment
- effort (Boston Consulting Group, n.d.)

The district's score on the DICE tool (see Appendix F) indicates that the district will likely be highly successful at implementing its desired change initiative related to the PoP. Scores on this tool can range from 7 to 28 with the lower the score the more likely the success of the implementation. The CCSB score at the time of assessment was 12. This score signals the likelihood of having the necessary conditions for the change initiative to meet with success (Sridharan, 2021).

The duration element refers to the time for initiative completion and the time between milestone reviews. Chapter three explores the establishment of a change implementation team along with their regular updates to members of the senior executive team. Regular updates will be an important component to continue to assess change readiness across the district.

Integrity and commitment refer to the change leader's credibility and the commitment of senior management and employees. The senior team has demonstrated a commitment to the PoP through discussions on how to ensure that all students meet with success in the school system. The existence of a multiyear strategic plan that articulates goals to address oppression, marginalization, and decolonization are also clear artifacts showing a commitment to change.

The final element refers to the level of increased effort required from each employee. If there is district wide distributed leadership supported by system level transformative leadership actions, then there will be minimal individual requirements as part of the change process.

The two assessments addressed in the DiP indicate a readiness for change related to this the PoP. The principles of equity and decolonization that intentionally challenge the inequities of the status quo must also be included in considering district readiness for change. Reassessing the readiness for change at different times is important to recognize the changes in personnel and leadership that occur yearly.



## **Equity and Change Readiness**

Addressing the organizational and individual readiness for change is a complex and multifaceted process (McLure & Aldridge, 2022; T. Wang et al., 2023). As indicated in chapter one, complexity theory is a beneficial frame for considering the PoP given the internal and external interactions related to the PoP (Benzaghta et al., 2021; Byrne & Callaghan, 2022; Turner & Baker, 2019; Uhl-Bien, 2021; Uhl-Bien & Arena, 2017). The readiness for change in the CCSB should take into account the complexity of the external environment related to equity initiatives (Diaz et al., 2023). Readiness for change must include an equity perspective with culturally responsive change included throughout the change process (Banwo et al., 2022; Khalifa et al., 2016).

To ensure the benefits of distributed leadership throughout the district to address the PoP, staff must be aware of the inequities that exist across the system and have the skills to advocate for those from underserved marginalized communities (Hawkes, 2022; Mealy & Bennett, 2022). This section looked at assessing the readiness of the organization to implement the change needed to address the PoP. The next section will look at the importance of leadership ethics in the change process.

## **Leadership Ethics in Organizational Change**

Organizational change is difficult in the absence of trust (Chrispeels & Harris, 2023; Kutsyuruba & Walker, 2016; Yurkofsky et al., 2020). Research has shown that ethical leadership is an important factor to contributing to the success of a change initiative (Bachmann, 2017; Branson & Gross, 2014; Brown & Heitner, 2023; By & Burnes, 2023; Schulte et al., 2022; Sharif & Scandura, 2014; Tienken & Starr, 2020; Ye et al., 2022). This section of the DiP further explores the important relationship between ethics, leadership, and the change process.

## Ontario Ethical Standards

In the province of Ontario, the Ontario College of Teachers (OCT) regulates the teaching profession. The OCT has adopted the following ethical standards for the profession: (a) care, (b) respect, (c) trust, and (d) integrity (Ontario College of Teachers, n.d.). The definitions of each of these standards appears in Table 2.

**Table 2**

*The Ethical Standards for the Teaching Profession*

Ethical Standard	Definition
Care	The ethical standard of <i>Care</i> includes compassion, acceptance, interest and insight for developing students' potential. Members express their commitment to students' well-being and learning through positive influence, professional judgment and empathy in practice.
Respect	Intrinsic to the ethical standard of <i>Respect</i> are trust and fair-mindedness. Members honour human dignity, emotional wellness and cognitive development. In their professional practice, they model respect for spiritual and cultural values, social justice, confidentiality, freedom, democracy and the environment.
Trust	The ethical standard of <i>Trust</i> embodies fairness, openness and honesty. Members' professional relationships with students, colleagues, parents, guardians and the public are based on trust.
Integrity	Honesty, reliability and moral action are embodied in the ethical standard of <i>Integrity</i> . Continual reflection assists members in exercising integrity in their professional commitments and responsibilities.

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*Note.* From “*Ethical standards*,” n.d., Ontario College of Teachers, (<https://www.oct.ca/public/professional-standards/ethical-standards>).

Leading the change process to address the PoP, I need to ensure that I demonstrate the ethical standards of the profession in my daily interactions with staff and students. As a transformative leader, I can articulate a vision and direction that permits and promotes flexibility and alternative experiences within the traditional publicly funded school system. Distributed leadership can assist with creating and sharing this vision of an improved future state for the CCSB. Trust and demonstrated ethical leadership are important predictors for others to adopt the shared vision (Berraies et al., 2021; Branson & Gross, 2014; Luhmann & Luhmann, 2017; Yuan et al., 2022). Ensuring that underserved marginalized communities do not face further marginalization is consistent with my demonstrated ethics of care (Shapiro & Stefkovich, 2016, Starratt, 2005).

### **Ethics of Care**

As a leader that focuses on relationships and with my intentional work with leaders at the macro and meso level of the organization, an ethics of care will continue to strengthen relationships (Bochner & Ellis, 2016; Shapiro & Stefkovich, 2016; Sherman & Liebenberg, 2023; Xu & Smyth, 2023). As noted in Table 2, the ethics of care includes actions that focus on compassion, acceptance and a focus on well-being. Throughout the change process, I will leverage these relationships and an ethics of care to address the PoP.

### **Ethics of the Profession**

The ethics of the profession are also relevant in addressing the PoP. As seen in Table 2, the ethics of the profession align with the intent of the professional standards in Ontario that address the definitions provided for each area of care, respect, trust, and integrity. The focus in education begins with each individual student. Ethics of the profession bring educators back to the reasons for their profession, to support the best interest of each student (Shapiro &

Stefkovich, 2016; Silva et al., 2023). Ethics of the profession are relevant to the PoP as the focus is on supports needed at the individual student level rather than focusing solely on the number of students that select homeschooling. This is also consistent with spirit work and a focused on shared humanity across the CCSB (Fullan & Edwards, 2021; Rincón-Gallardo, 2020). The ethics of the profession inform this focus on a shared moral commitment to the success and well-being of all students, especially those from underserved marginalized communities.

### **Catholic Lens and Social Justice**

As a leader in a Catholic school system, my ethics of care align with the Catholic social teachings that focus on the dignity of each child (Brady, 2017; McGrath, 2023; Rugani, 2023). My demonstrated ethical leadership will assist with collective spirit work (Fullan & Edwards, 2021) as staff focus on a shared humanity; one where every student regardless of their differences and uniqueness, benefit from personalized learning available in publicly funded education.

Spending time on Catholic social teaching may appear to conflict with spending time on more rigorous academic pursuits such as preparing for standardized testing. A focus on ethics of care justifies the use of time to support the dignity of each student as a key outcome for Catholic social teaching (Gleeson, 2023; Sutton et al., 2023; Yengkopiong, 2023). Creating strategies to address the PoP that may be counter to the status quo of traditional publicly funded education is justified from an ethics of care and Catholic social teaching. The next section of this DiP explores possible solutions to address the PoP.

### **Strategies and Solutions to Address the Problem of Practice**

This DiP has highlighted a desired future state for the CCSB. That future includes a publicly funded school system that offers a personalized learning environment and structures to

meet the unique needs of each student. Counter to traditional publicly funded education or the status quo, personalized approaches may vary in terms of graduation as a desired outcome, participation in assessment practices, time spent in school, medium of course delivery, or choice of curriculum. Of particular interest are the needs of students that currently homeschool, those from underserved marginalized communities and those that are considering homeschooling.

Addressing the need for more flexible structures is complex given the various reasons that families choose to homeschool. Current research has shown that the reasons for homeschooling are no longer, solely for religious ideologies, but rather a desire of improved flexibility for family circumstances (Gaither, 2009; Kunzman & Gaither, 2020; Pattison, 2024; Van Pelt, 2015). The following three solutions look at how to build capacity for the implementation of flexi-schooling (Gillie, 2022; Schafer & Khan, 2017).

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

Research has shown that a positive outcome of flexi-schooling is the personalized approach to learning in partnership between home and school (G. McGregor et al., 2022; Morgan et al., 2014; Pattison, 2024; Poultney & Anderson, 2021; Shay & Heck, 2015; te Riele et al., 2017). Flexi-schools support pathways that meet student and family individualized needs by co-creating meaningful learning choices that can occur at school and at home. Given the complexities of reasons that students choose homeschooling, non-traditional approaches and structures may become part of the alternative to provide personalized learning for each student within traditional schools (Baxter et al., 2022; Moffatt & Riddle, 2021; Morgan et al., 2014; Ray, 2019b; Schafer & Khan, 2017).

Flexi-schooling provides agency to the student and the parent for educational outcomes. The PoP seeks to implement flexi-schools in mainstream publicly funded education as opposed

to an alternate school environment (Corry et al., 2022; Poultney & Anderson, 2021; Riddle & Hickey, 2023).

### **Decolonization and Indigenous Students**

Informed by critical theory, scholar activists should consider solutions or strategies that challenge the status quo. As an example, focusing solely on graduation rates of Indigenous youth in the school system, may be reframed for the focus of this PoP, and instead allow Indigenous students and their families determine the value of graduation as the measure of success in publicly funded education (Louie & Gereluk, 2021; T. Miller, 2018).

### **Three Possible Solutions or Strategies to Address the PoP**

The first potential solution or strategy is a pilot project implementing a virtual professional learning community (PLC) at the CCSB's virtual school. The second possible solution is creating a flexi-school professional learning network for all school principals. The third possible solution focuses on system-wide change through the CCSB's established networks that focus on coherence across the district. All three solutions have the potential to decrease the trend of homeschooling through the implementation of flexi-schools.

#### **Solution 1: Virtual School Professional Learning Community**

Significant research exists that shows the benefits of professional learning communities, when implemented correctly (Admiraal et al., 2021; Donohoo, 2017; Donohoo & Velasco, 2016; Fullan & Hargreaves, 2016; C. Stewart, 2014; Timperley et al., 2020; Trust et al., 2016; Vanblaere & Devos, 2016; Venables, 2018; Watson, 2014). The collective research espouses the importance of the principal and shared leadership, intentional supportive structures, and a commitment to the learning and necessary action for impactful professional learning. Connecting

the PoP to the school and a collective understanding of how staff are contributing to the change will provide useful information on the impact of flexi-school at a pilot site.

Ensuring the staff understand the need for new structures and practices to address students leaving for homeschooling depends on shared values and school leadership (Fullan et al., 2015; Hairon et al., 2017; Lai et al., 2015; Olmo-Extremiera et al., 2023; Park et al., 2019; Schaap et al., 2019; Sterrett & Richardson, 2020; Sun & Leithwood, 2015; Tai & Omar, 2023;). The benefits of using the CCSB's virtual school for a pilot professional learning community include the ability to gather online as a virtual professional learning community (Brennan & Gorman, 2023; De La Paz et al., 2023; Garcia-Martinez et al., 2022; Rolandson & Ross-Hekkel, 2022) and the existing openness of the staff to implementing innovative learning environments to meet the needs of students.

Some of the concerns of a flexi-school pilot using the virtual school include the perceived challenges of future scaling to a different environment of in-person schools, and the uncertainty of the long-term viability of virtual schools depending on Ontario ministry of education funding directives. Another challenge is the reality that some educators are in the virtual school because of medical accommodations, and they may be resistant to more changes beyond working in the virtual school. This resistance to change may negatively affect their participation in a professional learning community. Piloting in the virtual school also has the potential of limiting participation of homeschoolers, as some may have no interest in learning in a virtual environment.

## **Solution 2: Principal Professional Learning Community**

The second solution builds on the research related to in-person PLCs and considers further research on professional learning networks. Research shows that changed professional

practice within learning communities affects system-wide improvements (Fullan, 2023; A. Harris & Jones, 2010; C. McGregor et al., 2019; C. Stewart, 2014).

One of the advantages of a principal professional learning community is that different principals may apply the proposed flexi-school solutions to their traditional school environment and then share with colleagues what worked and what did not work. An ongoing principal professional learning community results in each principal making modifications to their contextual practices based on shared learning and their unique school environment (Donohoo & Katz, 2020; Katz et al., 2018). This contextual implementation of strategies provides a range of solutions across the district.

The benefits of this model related to the PoP include valuable information gained from the contextual nature of schools including urban, rural, and suburban communities. Given the unique nature of why families choose flexi-schools, bringing a group of principals together will allow for greater flexibility in finding solutions that work for each family.

A challenge of implementing a professional learning network that focuses on principals is the current labour shortage that is affecting the CCSB. Principals are finding it difficult to leave their school building for professional learning given the daily shortage of staff. Many principals are choosing to remain in their school to problem solve coordinating the required coverage to ensure student supervision and safety. The operational reality of the labour shortages may serve as a barrier to the change implementation process and may restrict opportunities for traditional professional learning communities. A further limitation is the reliance on principals as the change facilitator in each of their schools. Other staff including vice-principals or guidance counsellors may be able to take on this leadership role but may not have the support network in place to assist with the change process.



### **Solution 3: System-Wide Focus on Coherence**

This third solution considers research on system coherence as part of the change process (Fullan, 2016, 2023; Fullan & Quinn, 2016; Senge, 2012). For lasting reform to take place, leaders must consider both their personal impact and system impacts (Fullan, 2023; Fullan & Gallagher 2020; Wagner & Keegan, 2006). School reform should take into consideration the reciprocal interactions between the school and the district and relationships with internal and external actors (Bros & Schechter 2022; Honig & Hatch, 2004; Kaffenberger & Spivack, 2023; Knudson & Kimner, 2022). A system-wide focus on change will consider multiple perspectives of various groups including external agencies that may have differing views regarding the change initiative.

In this proposed solution, existing CCSB structures including the central coherence committee, the interdepartmental committee, central leader meetings, subject councils, assessment and evaluation committee, supervised alternative learning committee, trustees, and executive council will all receive professional learning on flexi-schools. This professional learning across multiple channels will include student personal stories of their experiences and shortcomings in publicly funded education (Khalifa, 2018; Khalifa et al., 2019; Wessel-Powell et al., 2023).

The CCSB teaching and learning framework is deep learning (Fullan & Quinn, 2018; Quinn et al., 2020). The components of flexi-school align to learning partnerships, pedagogical practices, leveraging technology and learning environments within the existing deep learning model. This alignment will help to keep coherence with existing district priorities rather than seeing flexi-schools as another new initiative. In this proposed solution or strategy, change champions will introduce the tenets of flexi-schooling through existing infrastructures.

## **Change Fatigue**

The CCSB has been actively implementing separate change initiatives that focus on equity, diversity, and inclusive education such as training all principals on anti-bias interview skills. Regardless of the selected solution or strategy to address the PoP, consideration should take into account the potential for change fatigue in the CCSB. Change fatigue is “the lack of mental and physical energy to participate in a new change project” (Leflar, 2021, p. 88).

Change leaders will need to ensure that communication and feedback loops are intentional so that the purpose of the change is understood (Dool & Alam, 2022; Jones & Harris, 2020; Koh et al., 2023; L. K. Lewis, 2019; McLure & Aldridge, 2022). Chapter three of this DiP describes the communication processes and feedback loops that assist with the change implementation process.

## **Selection of Preferred Solution**

Table 3 shows a comparison of the three possible solutions applied against three sets of criteria for consideration. The first set of criteria reflect the macro or district level scale of the desired change. The evaluation of each possible solution or strategy will consider the following:

- addresses the problem regardless of the student’s assigned school,
- coherence with Board focus on marginalization and oppression,
- likelihood of achieving institutionalization, and
- provides potential solutions for the greatest number of homeschooleders.

Applying the first set of criteria to the three possible solutions favours system-wide central implementation. This system-wide approach will build the greatest capacity and has the potential to affect the most homeschooleders. As seen in Table 3, institutionalization is least likely in a virtual school pilot since most of the system may be unaware of the change initiative and

CCSB data indicates that 99% of all students have returned to in-person learning. Focusing on personalized and flexible learning only for the 1% of students that are attending virtual school will not lead to institutionalization.

**Table 3**

*System Scale Evaluation*

First Set of Criteria: System scale	<b>Solution 1: System-Wide Central Implementation</b>	<b>Solution 2: Principal Professional Learning Network</b>	<b>Solution 3: Virtual School Pilot</b>
Addresses the problem regardless of the student's home school			
Coherence with system focus on marginalization and oppression			
Likelihood of leading to Institutionalization			
Addresses needs of the greatest number of homeschoolers			

Key Index: Ability for each solution to address the areas of the identified criteria

Not at all	Partially	Completely
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The second set of criteria, as seen in Table 4, looks at the resources needed for each possible solution. The resources include human capital, fiscal resources, and the time required as part of the change process. In contrast to the first set of assessment criteria, the small-scale approach of the virtual school is the most favourable when considering resource limitations or constraints. Given the limited number of staff and students that would be involved in a virtual school pilot, less resources would be required. System wide implementation would require the greatest investment of time, human capital, and financial resources. Solutions that minimize resource requirements are favourable from a fiscal perspective.

**Table 4***Resource Requirement Evaluation*

Second Set of Criteria: Resources	Solution 1: System-Wide Central Implementation	Solution 2: Principal Professional Learning Network	Solution 3: Virtual School Pilot
Time			
Human			
Fiscal			

Key Index: Ability for each solution to address the areas of the identified criteria

Not at all	Partially	Completely
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The final set of criteria, as seen in Table 5, looks at the guiding questions related to the PoP. This set of criteria includes providing voice and agency to underserve marginalized communities, ensuring that the change process occurs at the micro, meso, and macro levels of the organization, and minimizing barriers that are protecting the status quo.

System-wide implementation is the most favourable using this criterion as it has the opportunity to involve and impact the greatest number of underserved communities, and at the same time, it can draw upon the greatest pool of change agents within the CCSB.

**Table 5***Guiding Questions Evaluation*

Third Set of Criteria: Guiding Questions	Solution 1: System-Wide Central Implementation	Solution 2: Principal Professional Learning Network	Solution 3: Virtual School Pilot
Student Voice and Agency			
Micro, Meso, Macro Coherence			
Minimizing Barriers			

Key Index: Ability for each solution to address the areas of the identified criteria

Not at all	Partially	Completely
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## **Analysis of Criteria**

The selected solution to address the PoP is solution one. This solution met the requirements of each of the criteria while the other possible solutions each had one or more areas that would only partially fulfill the criteria. Solution one incorporates the elements of solution two and three and takes advantage of the existing structures for a coherent system-wide implementation. This system-wide approach is most likely to achieve the desired future state of all school leadership teams expanding their traditional structures to include flexi-schooling options, resulting in less families leaving publicly funded education for homeschooling. This solution aligns with my macro or system level of agency and influence.

## **Chapter 2 Conclusion**

The Central Catholic School Board has experienced a trend of increased homeschooling. There are many reasons that families choose to homeschool. Recent research has shown that parents select homeschooling to have more flexibility to address their personal family situations. Flexi-schools is a relatively new model that provides agency to families to decide curriculum, assessment practices, and instructional practices and what they will learn at home and what they will learn at school. Implementing flexi-schools within the existing coherence structures and within the CCSB's deep learning framework is a preferred solution to the PoP. Transformative and distributed leadership practices will provide a balanced pathway to address the PoP.

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

A system-wide central implementation of flexi-schooling may address the PoP of increased numbers of parents selecting homeschooling. This chapter expands on change implementation practices needed to implement, monitor, evaluate, and communicate the change process to move towards the desired future state. The future state will include opportunities for students to combine personalized learning from home with learning at school, based on their individualized preferences for scheduling, assessment, and medium of delivery.

Chapter three is comprised of the following four sections: (a) change implementation plan; (b) plan to communicate the need for change and the change process; (c) change process monitoring and evaluation; and (d) next steps, future considerations of the plan for organizational improvement.

#### **Change Implementation Plan**

The change implementation plan (CIP) recognizes the need for adaptive and iterative implementation given the complexity and interconnectivity of system-wide transformative change (Brown & Heitner, 2023; Crevani et al., 2021; Uhl-Bien, 2021; Uhl-Bien & Arena, 2017). As seen in Appendix G, monitoring and evaluation are important components of the CIP to ensure that adjustments to the implementation are timely.

Throughout this DiP, change and ethical leadership have been a constant, aligned with my personal leadership practices and the organizational values of the CCSB. Ethics of care and ethics of the profession shape the implementation plan. Critical theory perspectives influenced by the work of authors including Khalifa (2018), Capper (2019) and Shields (2020) also provide a lens for the CIP. An existing praxis of distributed leadership in the district will allow multiple

partners to be involved in the CIP (Claudet, 2014; Garcia-Torres, 2019; King & Stevenson, 2017; Kortantamer, 2023; Ross et al., 2016).

### **System Change Timelines**

The timeline for implementation coincides with the CCSB strategic plan cycle of three years. The short term is change implementation in year 1, the medium term as year 2, and the long term as year 3 and beyond. This three-year cycle is evident in the change implementation, monitoring and evaluation plan in Appendix G. Several change leadership authors support a multi-year change implementation, considering the complexity and nature of system-wide change (Bohanon et al., 2021; Fullan, 2020; Sotiriou et al., 2016; Waters & White, 2015). Monitoring and evaluation are integral parts of the CIP to be responsive to input and feedback from across the system (Kearney et al., 2016; Markiewicz & Patrick, 2016; Waters & White, 2015).

Chapter two included a description of a hybrid change model to frame the change process (Deszca et al., 2020; Schein & Schein, 2017). The CIP builds upon this hybrid model including key partners, actions, and a process to monitor and evaluate the implementation and changes in culture (Schein & Schein, 2017). Later in chapter three, I will further discuss the important role of communication and knowledge mobilization.

### **Four Stages of Implementation**

The CIP, as outlined in Appendix G, appears in a linear chronological manner. The reality of a system-wide change implementation is that the implementation will need to be agile and adapt as the organization and staff begin to change during the CIP (Holbeche, 2019; Mergel et al., 2021; Reimers, 2021). This approach is consistent with complexity theory used to consider the complexities of the PoP (Crevani et al., 2021; Uhl- Bien, 2021; Uhl-Bien & Arena, 2017).

### **Awakening Phase: Year One**

Table 6 provides an outline of the key strategies and processes implemented during the awakening phase of the CIP (Deszca et al., 2020). The key change leaders during the awakening phase will be the director of education, superintendents, central leaders and school principals. Given my macro level agency, I will use system-wide homeschooling data to communicate the vision for change to the superintendents. As noted in chapter two, the selected solution to address the PoP relies on coherence across the existing structures and the district's existing distributed leadership practices. The involvement of central leaders, including the director of education, will help with coherence and minimize barriers to address the goal of creating a vision during this phase of the CIP.

During this first phase of the CIP, it is important to embed the language of the desired change into existing strategic plans to have visual representation of needed structures and processes (Schein & Schein, 2017). Key supports in this phase are the central coherence committee, superintendents, and external partners. These supports assist with coherence by providing leadership at the micro, meso, and macro levels. The central coherence committee includes cross-department representation. The members of this committee will highlight issues that arise and will suggest changes, such as modifications to staff presentations. The superintendents will assist in addressing potential issues through their support of each of their family of school principals. Partners including homeschooling associations will provide input through surveys and focus groups. Student and parent voice and agency will be important sources of culturally relevant input, especially from homeschoolers. Their feedback will be used by the central coherence committee to modify the implementation plan and to provide recommendations to members of the senior executive team.



As noted in Table 6, the awakening phase also includes an assessment of readiness for change across the organization. The central coherence committee will use the results of readiness for change to determine areas where additional supports or resources may be required. Providing additional supports will help to mitigate barriers that protect the status quo. For example, if resistance from the assessment and evaluation committee is identified, a superintendent can further explore their concerns and assist in explaining the vision for an improved future state that benefits all students. The selected change leaders will impact all levels of the organization through their influence at the macro level (director of education and trustees), meso level (superintendents and principals), and micro level (external partners).

**Table 6**

*Awakening Phase – Change Implementation Plan*

Key Change Leaders	<ul style="list-style-type: none"> <li>• Director of education, superintendents, implementation team of central staff leaders and school principals</li> </ul>
Key Implementation Strategies	<ul style="list-style-type: none"> <li>• Establish vision for change through presentations and meetings</li> <li>• Enlist support of trustees through vision and Board meeting presentations</li> <li>• Enlist support of external partners including homeschool associations through meetings and presentations</li> <li>• Integrate vision of future state within existing plans including the mental health plan and the equity and inclusive education plan</li> <li>• Establish coherence with the interdepartmental committee and the central coherence committee</li> <li>• Enlist support of the vision for a future state with school principals through meetings and presentations</li> </ul>
Key Processes	<ul style="list-style-type: none"> <li>• Collect homeschool data via focus groups and surveys</li> <li>• Update strategic plan to include language of flexi-schools. The updated language serves as artifacts of cultural change</li> <li>• Creation of implementation team with monthly meetings and reports back to senior executive each semester</li> <li>• Assessment of different levels of the organization and readiness for change in areas such as assessment and evaluation, attendance, cross-enrolment between in-person and virtual school</li> </ul>

## **Strategic Alignments**

Research has shown that strategic alignment of a change initiative with the organization's strategic goals is an important aspect of change implementation (Boulagouas et al., 2021; Fragouli & Yankson, 2015; Ghonim et al., 2022; Piotrowska-Bożek, 2019). The CCSB multi-year strategic plan includes strategies to support equity-deserving groups including racialized students, 2SLGBTQ+ students, and others from underserved marginalized communities. The change implementation plan aligns with these existing strategic goals.

Superintendents are leads across existing structures including the interdepartmental and coherence committee and have responsibility for CCSB plans including equity and mental health. Change implementation during the awakening phase will use these existing structures to connect the vision of a preferred future state to the work that is already taking place in the district to address inequities for those from underserved marginalized communities. This alignment with existing change initiatives at the meso level assists with coherence (Fullan & Quinn, 2016) and the social justice focus will resonate with staff as a continuation of existing priorities.

## **Implementation Team**

In addition to the important role of superintendents during the awakening phase, the involvement of an interdepartmental implementation team will also be integral to the CIP. A growing body of research concludes the importance of collaboration when implementing system-wide change initiatives (Judkins et al., 2019; Lancet et al., 2023; L. K. Lewis, 2019; Packard, 2021). Given my agency, my participation as a member of the implementation team will provide both an opportunity to share the vision of transformative reform, and opportunities to hear concerns from system-level leaders who implement the changes. As seen in Appendix G, the implementation team is responsible for assessing the readiness for change across the district.

## Mobilization: Year One and Two

The second stage of the change implementation plan encompasses mobilization during year one and year two. Table 7 provides an outline of the key strategies and processes implemented during the mobilization phase of the CIP.

**Table 7**

*Mobilization Phase – Change Implementation Plan*

Key Change Leaders	<ul style="list-style-type: none"> <li>• Director of education, superintendents, implementation team of central staff leaders, school principals, vice-principals, registration staff, guidance staff, and office staff</li> </ul>
Key Implementation Strategies	<ul style="list-style-type: none"> <li>• Personalized stories of students from underserved marginalized communities that have left the school system will help to challenge espoused values</li> <li>• Presentations to various networks on the optional flexible structures including attending classes without assessments, attending partial days, attending only preferred courses; and combining in person studies with at home studies or virtual school</li> <li>• Continue to update executive committee and provide updated Board meeting presentations to trustees</li> <li>• Share with the unions, examples of how flexi-school is working to support students and is being managed by educators within existing terms and conditions</li> <li>• Create a marketing name for flexi-schools using a term that will resonate with families – enlist communication department staff to develop marketing materials</li> </ul>
Key Processes	<ul style="list-style-type: none"> <li>• Share flexi-schooling options through existing parent networks</li> <li>• Focus groups with students that have left the school system</li> <li>• Questionnaires created by research department staff to determine best practices to achieve desired future state</li> <li>• Creation of infographics by communication department staff to show flexi-school options and personalized pathways</li> <li>• Use existing family of school structures to have superintendents share best practices with networks of principals</li> <li>• Researchers create questionnaires to document culture changes</li> <li>• Parent presentations for school councils and parent umbrella groups</li> </ul>

As seen in Table 7, the key change leaders during the mobilization phase expand to include guidance counsellors, office staff, and registration staff. These additional supports, during this phase of the CIP, will expand the presentations of the flexi-school options to additional networks as part of system change. I posit that a strategy to mitigate resistance is to include the union as a partner in the change process. Presentations to the union will focus on how the CIP is working within existing terms and conditions.

Additional strategies noted in Table 7 include the support of the communications department staff to create a marketing name and materials such as infographics to promote flexi-schooling. These marketing materials will add to the artifacts that provide visual representation of the desired change (Shein & Schein, 2017).

### **Power of Personalized Stories**

As seen in Table 7, the sharing of personalized stories during the mobilization stage will help to focus on the shared moral purpose of wellbeing and success for all, while providing a system-wide commitment to address the increased trend of homeschooling (Fullan & Edwards, 2021; Gélinas-Proulx & Shields, 2022; Makaiau et al., 2023; Tapia-Fuselier, 2023). The power of personal stories will address social injustices including structural racism (Benjamin & Laughter, 2023; Bopaiah, 2021; Bruce & Mckee, 2020; Lasater et al., 2023; Safir & Dugan, 2021). Providing this level of student voice and agency will help to challenge existing beliefs.

These emotional and personalized examples from within the CCSB may serve as a catalyst for third-order change. As noted in Table 7, personalized stories may challenge the espoused values of staff across the CCSB (Schein & Schein, 2017, p. 21). For example, an espoused value of supporting the dignity of all students may be challenged by a student sharing how they have left the CCSB due to experiences of racism and not feeling that they belong.

## Acceleration: Year Two and Three

The third stage of the change implementation plan encompasses acceleration during year two and year three. Table 8 provides an outline of the key strategies and processes implemented during the acceleration phase of the CIP. The key change leaders during the acceleration phase remain the same with the addition of homeschool association advocates.

Artifacts will be updated during this phase of the CIP, including examples of flexi-schooling in student achievement plans. As noted in Table 8, school visits will provide an opportunity for superintendents to acknowledge and celebrate school implementation of flexi-schools. School visits also provide an opportunity for superintendents use existing tools such as the school condition index to validate changes through the presence of artifacts.

**Table 8**

### *Acceleration Phase – Change Implementation Plan*

Key Change Leaders	<ul style="list-style-type: none"> <li>• Director of education, superintendents, implementation team of central staff leaders, school principals, vice-principals, registration staff, guidance staff, office staff, and homeschool association advocates</li> </ul>
Key Implementation Strategies	<ul style="list-style-type: none"> <li>• Updates to student achievement plans listing localized examples of flexi-schools</li> </ul>
Key Processes	<ul style="list-style-type: none"> <li>• School by school impacts captured, shared and celebrated</li> <li>• Use of existing school visits to capture success stories</li> <li>• Financial analysis of impact of flexi-schools</li> <li>• Review learning environments during school visits as part of the existing school conditions index discussion</li> </ul>

## Critical Theory and Transformative Leadership

During the acceleration phase, a measure of transformative change will see the previous advocates for students leaving publicly funded education now advocating for homeschoolers to access flexi-school opportunities. Students who had previously resorted to homeschooling will

now be able to share their personalized stories of how they are creating their own learning experiences. In order to continue to challenge the status quo, focus on social justice, and redistribute power, key change leaders will ensure that platforms like staff meetings exists for those from undeserved marginalized communities to share their experiences. These personal stories during staff meetings provide additional opportunities to challenge espoused values of staff while also addressing the goal of system scale across all schools.

### **Institutionalization: Year Three and Beyond**

The final stage of the change implementation plan is institutionalization during year three. Table 9 provides an outline of the key strategies and processes implemented during the institutionalization phase of the CIP. The key change leaders during the institutionalization phase include the director of education, the superintendents and the trustees.

**Table 9**

#### *Institutionalization Phase – Change Implementation Plan*

Key Change Leaders	<ul style="list-style-type: none"> <li>• Director of education, superintendents, trustees</li> </ul>
Key Implementation Strategies	<ul style="list-style-type: none"> <li>• Incorporate flexi-school options into updates to board improvement plans, mental health plans, equity plan and Indigenous education plan; evidence of key artifacts of change</li> <li>• Formalize training packages for site-based staff involved in registration and scheduling, challenges espoused values</li> <li>• Communication department staff update infographics based on feedback across the system which serves as evidence of espoused values and changes in underlying assumptions</li> </ul>
Key Processes	<ul style="list-style-type: none"> <li>• Share success stories during formal presentations</li> <li>• Disband the implementation team once the processes have been incorporated into other structures throughout the organization as evidence of new underlying beliefs across the district; evidence of changed underlying assumptions related to flexi-schooling</li> </ul>

As noted in Table 9, artifacts are embedded into improvement plans including plans for mental health, equity, and indigenous education. The inclusion of training packages related to registration and scheduling will serve as artifacts and as evidence of the changed espoused values that focus on the dignity of every child. The goal of the final phase of implementation is to have changed underlying assumptions of staff related to personalized pathways for students to meet with success. As underlying assumptions (Schein & Schein, 2017, p. 21) change across the system, new practices will be embedded for students to follow a personalized pathway. These embedded practices will help to mitigate against the protection of the status quo during the institutionalization phase.

### **Transformative and Distributed Leadership Practices**

The institutionalization phase of the implementation will rely less on transformative leadership practices used early in establishing a vision for the future desired state. As practices become part of the changed culture of the organization, and third-order changes have resulted in staff challenging old ways of operating, new ways of being emerge (Candelarie, 2023). A shared culture will rely on these new structures to ensure the practices remain, even as leaders transition away from the district (Schein & Schein, 2017).

During implementation, social constructivism will have had a role in challenging the current status quo through a more participative process (Jung, 2019; Omodan, 2022; Pfadenhauer & Knoblauch, 2019; Van Hover & Hicks, 2017). As an example, encouraging dialogue that welcomes cultural and personal experiences may result in staff questioning traditional authority and power and validating different perspectives. Leaders across the macro, meso, and micro levels, will share new cultural norms and values as becoming part of the district's way of being, or part of the new collective spirit work (Fullan & Edwards, 2021; Schein & Schein, 2017).

## **Barriers to Change**

Through each phase of the CIP, leaders will need to be aware of barriers to change and be adaptive to changing the plan as needed. For example, the movement of a principal from one school to another may require the allocation of more time for the new principal to build relationships and trust before proceeding with change at their new school. Several researchers have noted that many large-scale education reforms meet with failure (Aldridge & McLure, 2023; Fullan, 2020; Fusarelli & Bass, 2015; Gaubatz & Ensminger, 2017; Leflar, 2021; Sugarman, 2019). Change implementation fails because of too many change initiatives taking place, lack of coherence between change initiatives, lack of support, lack of clarity as to why the change is needed and a lack of resources to carry out the change (Aldridge & McLure, 2023; Leflar, 2021; McLure & Aldridge, 2022; Payne & Smith, 2018; Simper et al., 2022). System-wide implementation is the selected solution to address the POP. This approach addresses the barrier of lack of coherence between initiatives by ensuring the integration of solutions within existing key initiatives. This approach also addresses a lack of resources by leveraging existing resources from across departments.

The existing focus on coherence provides the structures to implement system-wide change. Addressing the PoP with the existing focus on supporting students from underserved marginalized communities provides clarity and alignment between initiatives. Regular feedback from across the district through the central implementation team will provide insights into needed resources for implementation. The direct involvement by the director of education and superintendents shows the commitment by members of the senior executive team.

The next section of chapter three will address the plan to communicate the need for change and the change process.



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

The previous section focused on the CIP. I will now highlight the importance of communication, along with the plan to communicate the need for change across the CCSB.

### **Knowledge Mobilization**

Knowledge mobilization is an integral component in all phases of the communication plan. Knowledge mobilization is an umbrella term for “the range of active approaches to encourage the creation, sharing and use of research-informed knowledge alongside other forms of knowledge” (Powell et al., 2018, p.38).

Knowledge mobilization ensures that important research and evidence-based practices reach the partners whose implementation will influence the system (Malik, 2020). Knowledge mobilization occurs within a complex environment that does not adhere well to a linear framework (Malin & Brown, 2019; Ward, 2017). Despite this limitation, for the sake of simplicity, Appendix H presents a linear knowledge mobilization plan aligned to the change path model (Deszca et al., 2020). Ward’s (2017) knowledge mobilization framework addresses key questions including: why do you want to mobilize knowledge, what type of knowledge do you want to mobilize, whose knowledge do you want to mobilize, and how do you want to mobilize knowledge.

As seen in Appendix H, the reasons for knowledge mobilization change through the different phases of the CIP. In the awakening phase, factual knowledge is shared with key decision makers to help develop local solutions to the POP. In the mobilization phase, practical information is shared with frontline staff leaders to develop new programs and to assist connections between learning networks. In the acceleration phase, the practical knowledge of reasons for homeschooling and the benefits of flexi-schooling are used to shape new practices

and behaviours of school staff. The process of knowledge mobilization during this phase also helps to shape espoused beliefs and values (Schein & Schein, 2017, p. 19). In the final phase of the CIP, institutionalization, knowledge mobilization helps staff to adopt and implement clearly defined practices and make connections between learning networks.

### **Key Community Partners**

The successful implementation of the change initiative requires a thorough communication plan (Bolman & Deal, 2017; Elsan-Mansaray, 2019; Kaur-Bagga et al., 2023; Muhammad & Cruz, 2019; Onyeneke & Abe, 2021; Paine et al., 2023; Yue et al., 2019). The implementation committee will determine the most appropriate messengers throughout each phase of the change process. For example, in the early phases of change, the director of education will signal the importance of the change to address oppression and to ensure that all staff see the desired future state as an important social justice outcome.

### **Communication Plan**

There are four purposes for a communication plan: (a) to explain the need for change, (b) to help staff understand their personal impact, (c) to explain any structural or changes in practice, and (d) to keep staff informed of progress during implementation (Deszca et al., 2020). The implementation team will revisit these four purposes throughout the implementation. The communication plan will span a three-year timeline to coincide with the CIP. The communication principles informing each phase of the change process include: message and media redundancy are key for message retention, face-to-face communication is most effective, line authority is effective in communication, the immediate supervisor is key, opinion leaders need to be identified and used, and employees pick up and retain personally relevant information more easily than general information (Klein, 1996). To be relevant today, Klein's principles

should also consider partner and a cultural perspectives (Browne, 2021; L. K. Lewis, 2019; Packard, 2021).

In order to address different communication style preferences across the district, a variety of communication channels are suggested (Arabella-Hallerberg et al., 2018; Braun et al., 2019; Carroll et al., 2022; Deszca et al., 2020; Lee, 2022; Nieken, 2022). The principles of equity and decolonization should inform the selected communication methods during each phase of the change process. As noted by Khalifa (2018), communication should include a critical lens to ensure culturally appropriate and accessible communication. Community voices, including student homeschoolers, inform culturally responsive communication throughout the change process. For example, an email explaining new flexi-school options may work for one particular community while face-to-face meetings may be required for another community or cultural group (Balakrishnan, 2022; Bojadjev et al., 2023; Guirdham & Guirdham, 2017; Wilce, 2017).

As seen Appendix I, the communication plan incorporates the change path phases, and the four phases of a communication plan (Deszca et al., 2020). The four phases include: (a) pre-change approval, (b) developing the need for change, (c) midstream change and milestone communication, and (d) confirming and celebrating the change success.

Table 10 highlights the key partners and the key communication content to address in the first year of the communication that corresponds with the awakening phase and the pre-change phase. The knowledge mobilization in the first phase of the communication plan will ensure that superintendents and central leaders address the myths of why some students have chosen homeschooling. The research related to those from underserved marginalized communities turning to homeschooling to avoid school-based racism will help to destigmatize homeschoolers (Posey-Maddox et al., 2021; S. E. Roberts et al., 2024; M. D. Stewart, 2020).

**Table 10***Awakening and Pre-Change Phase – Developing the Need for Change*

Communication Content	Outcomes
Vision and the need for change	Vision for change is approved by trustees and senior executive team
Homeschooling data to support the vision	Change vision is understood by identified change agents and leaders
Connection of vision of preferred future state with strategic plan	

As seen in Table 10, the initial communication enlists multiple change leaders to assist with developing the need for change. Homeschool data and personal stories will show the disproportionate number of students from underserved marginalized communities that have left the CCSB for homeschooling. As discussed in chapter one, including the voices of homeschooled students from underserved marginalized communities is an important strategy for change.

The key change leaders to communicate during the awakening phase and pre-change phase include the director of education, the superintendents, and central leaders who all have significant agency across the district (Oreg & Berson, 2019). This communication process will assist with coherence across the district as similar messages are shared at the macro, meso, and micro levels of the CCSB.

Table 11 shows the second phase of the communication plan, the mobilization phase that aligns with developing the need for change. In this phase, the communication channels expand to include more educators across the system. The external focus ensures that parent groups and homeschool associations are aware of the changing structures within the CCSB.

**Table 11***Mobilization and Developing the Need for Change*

Communication Content	Outcomes
Flexi-school options including: attendance options, virtual school options, eLearning options, assessment options, diploma track options	District educators and administrators understand the value of the changes to support the district multi-year plan and targeted supports to those from traditionally marginalized communities
Senior staff call to action and alignment with strategic priorities	Change vision is understood by identified change agents and leaders

Communications' staff will work with equity and inclusive education department staff to ensure culturally appropriate external messaging. For example, it will be important to articulate the contributions of racialized staff and community members in designing new structures in order to avoid perceptions of performative stances or White saviour attitudes (Aviles, 2023; Gates et al., 2024; Lin et al., 2023). During this phase of the communication plan, knowledge mobilization will center on the importance of allyship and an understanding of the focus on social justice (Bruce & Mckee, 2020; Lin et al., 2023; Tilghman-Havens, 2020).

Moving from year one into year two will see the continuation of the mobilization phase, and the start of the midstream change and milestone communication. As seen in Table 12, the new partner to consider is the local ministry of education. CCSB staff will provide updates on flexi-school options to the ministry of education staff. This allows ministry staff to have the required information to respond to community inquiries. Communications department staff will ensure that the ministry have briefing notes and easy to follow infographics to be able to answer parental and community questions. This macro level focus adds to the coherence of the strategies being implemented at the meso and micro levels of the CCSB.

**Table 12***Mobilization and Midstream Change and Milestone Communication – Year 1*

Communication Content	Outcomes
Success stories as milestones	Focus groups and questionnaires are used to adjust the change plan and communicate iterative improvements
Data on students returning to the district part-time with flexi-school option and impact on enrolment and finances	Trustees and members of the executive team are provided with formal presentation updates
Director of Education address to the system to include celebrations of system support to students that had previously chosen to leave the district	Local ministry staff can answer community inquiries Communication staff develop and brand resources to support the flexi-school options

The implementation team will communicate milestones including the number of students that have returned to the CCSB and the impact on enrolment and finances. Principals will share examples of supports provided to students that in the past received no support when they were homeschooling. As an example, a student who is now attending school three days a week and learning an Ojibwe dialect at home two days a week, benefits from the school's digital technologies, resource support if needed, and can participate fully in extracurricular activities.

At this stage of the change process, communication department staff will brand and market the flexi-school options offered by the CCSB. Knowledge mobilization in year two will expand from the initial change leaders to the staff across the district that will be implementing the flexi-school options. Principals will receive communication visuals as they work to expand the knowledge mobilization in their schools (Golhasany & Harvey, 2023; Malin & Brown, 2019). As seen in Table 13, year two will see the continuation of the mobilization phase and the midstream change and milestone communication.

**Table 13***Mobilization and Midstream Change and Milestone Communication – Year 2*

Communication Content	Outcomes
Change process is embedded with the Deep Learning framework elements of: pedagogical practices, learning partnerships, learning environments, and leveraging technologies	Monitoring tools include focus groups and questionnaires used to provide input into adjustments of the communication plan
Change process is embedded within both the existing equity framework and the mental health framework	Homeschooling students, parents, and homeschooling associations are updated on the progress

The second year of implementation will embed flexi-schooling into existing frameworks. For example, an Indigenous youth may decide they are not working towards graduation and instead spend the mornings at school and the afternoons working with a local elder. This flexi-school option is as an example of a learning partnership within the deep learning framework. Evidence of third-order change may include when pathways other than graduation are recognized as viable options based on family selected personalized measures of success. Stories from homeschoolers that now attend post-secondary institutions, without a high-school diploma, can be shared to help staff understand the availability of non-traditional personalized pathways.

The mental health framework for the CCSB will incorporate examples of students who are attending school part time and attending the virtual school part time as an intentional strategy to promote positive well-being. Some students may take a particular course without taking part in assessment, and instead augment the Ontario curriculum with their own independent study of topics such as historical racism or oppression against their community.

Table 14 outlines the acceleration phase and the midstream change and milestone communication that takes place during year two and year three.

**Table 14**

*Acceleration and Midstream Change and Milestone Communication*

Communication Content	Outcomes
Success stories as milestones shared by external homeschooling groups	Community celebrations of flexi-school options and personal stories of success
Staff sharing of strategies and challenges Central staff and administrator focus groups share best practices	Trustees and members of senior executive receive presentation updates and impacts of enrolment on finances
Superintendents review strategies during school visits and share data with school admin team	

Outside groups will share success stories as they see the benefits in their communities. Communications department staff will highlight these stories across the CCSB. Focus groups will share strategies and examples of how school staff are adapting to the new flexi-school options and addressing any challenges. Superintendents serve an important communication role in connecting staff from various schools towards shared solutions and the sharing of best practices. Presentations to trustees will continue through the multiyear strategic plan that will highlight how flexi-schooling is helping the board to achieve its strategic goals. Regular updates will include enrolment and finance presentations indicating the number of students that are participating in flexi-school options.

The final year of the three-year implementation will highlight the institutionalization phase along with confirming and celebrating the change. As seen in Table 15, the board



presentation updates will move to every second year. The communications department staff will incorporate flexi-school option training into administrator onboarding.

**Table 15**

*Institutionalization – Confirming and Celebrating the Change*

Change Path Communication	Communication Content	Outcomes
Institutionalization	Celebration of progress since year one with more schools and student uptake	Yearly presentation to board moved to alternate year cycles
Confirming and celebrating the change	Flexi-school options are celebrated as good for all students	Incorporate into new admin onboarding

The next section will look at the important integration of monitoring and evaluation throughout the CIP.

### **Change Process Monitoring and Evaluation**

Monitoring and evaluation are important components of the change process in order to properly assess and adjust the change implementation plan. Monitoring and evaluation serve different functions as part of the change implementation process, even though they are closely associated. This section will look at processes used to monitor and evaluate the change implementation. I will outline possible refinements to the implementation process along with ways to address barriers from preventing transformative change.

#### **Monitoring and Evaluation Processes**

Monitoring and evaluation have distinct functions when considering change implementation. Monitoring is “the planned, continuous and systematic collection and analysis

of program information able to provide management and key partners with an indication of the extent of progress in implementation, and in relation to program performance against stated objectives and expectations” (Markiewicz & Patrick, 2016, p. 12). 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).

The monitoring process assists in creating iterative strategies to address the PoP while evaluation tools provide a snapshot in time of the desired changes (Browne, 2021; Koleros & Mayne, 2019; Markiewicz & Patrick, 2016; Packard, 2021). Given the focus on social justice in addressing the PoP, principles of equity and decolonization should frame monitoring and evaluation processes (Khalifa, 2018). In each phase of the implementation over the three-year timeframe, artifacts, espoused values, and underlying beliefs are identified (Schein & Schein, 2016). Monitoring and evaluation strategies should include a lens to ensure culturally appropriate implementation. As an example, this could include community voices informing the selected monitoring and evaluation tools, while ensuring inclusive language, and promoting culturally responsive practices. Additional considerations during monitoring and evaluation include:

1. Frame the need for change in terms of outcomes.
2. Monitor the environment.
3. Make monitoring and decision criteria more explicit.
4. Help protect against biases.
5. Help others involved or affected by the change to understand expectations.
6. Guide the change while gauging progress and making corrections.
7. Bring the change to a conclusion (Deszca et al., 2020).

## **Implementation Team**

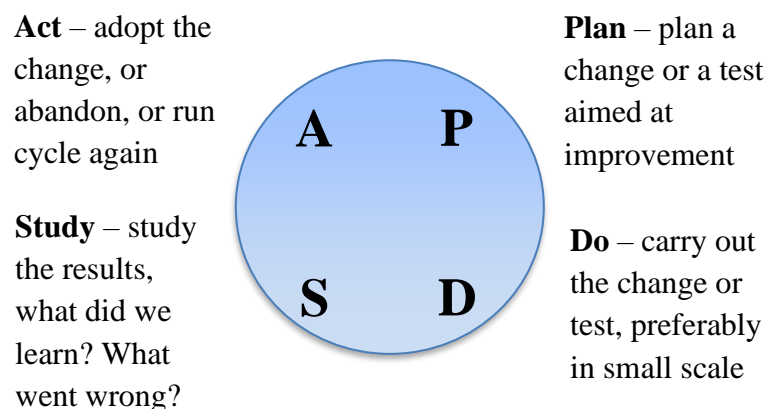
As part of the distributed leadership approach in the district, monitoring and evaluation will become the responsibility of the implementation team. This team will include central leaders, the director of education and a district researcher. Taking an interdepartmental approach to both monitoring and evaluating will assist with coherence (Fullan & Quinn, 2016). As seen in Appendix G, the CIP includes the integration of monitoring and evaluation.

The committee will assess the cultural changes using Schein's three levels of culture model (Schein & Schein, 2016). Confirming culture change is important when looking at institutionalization and determining third-order change. As leaders retire or move to other positions, the structures that are in place along with the established culture will assist in ensuring the change process remains. Interactions with staff, along with an analysis of artifacts will help to determine culture change. (Armenakis et al., 2011; Schein & Schein, 2016). An example of artifact examination could be digital or print flyers explaining student pathways and new registration advertisements.

## **PDSA Cycles**

The CCSB has experience using Plan-Do-Study-Act (PDSA) cycles as part of the school improvement planning process. Within each phase of the change process, PDSA cycles monitor and evaluate the change process (Chen et al., 2021; Christoff, 2018; Connelly, 2021; Crowfoot & Prasad, 2017; Donnelly & Kirk, 2015; Mekhitarian, 2022; Sloodmans, 2018; Stapleton et al., 2017). Using the PDSA cycle allows for iterative approaches that will be necessary taking into account complexity theory and the many interactions by partners across the district.

As seen in Figure 3, the PDSA model focuses on learning improvement, with four key stages: (a) Plan, (b) Do, (c) Study, and (d) Act.

**Figure 3***PDSA Cycle*

*Note.* Adapted from “*The new economics: For industry, government, education,*” by W. E. Deming, 2018, MIT Press, p. 91.

Using the PDSA model in each phase of the CIP, schools can test flexi-school options that are specific to the context of their school. For example, one school may explore allowing students to take a course without assessment, while another school may explore students taking a single course in school, one course in the virtual school and two courses outside the curriculum in their local community. The role of leadership is crucial in creating a culture of data inquiry that is open to cycles of monitoring and exploration (Deming, 2018; Leis & Shojanian, 2017, Mekhitarian, 2022). Superintendents will ensure that they support school principals with data literacy and connect principals to supports as needed.

**Awakening Phase**

As seen in Appendix G, the Awakening phase in year 1 focuses on establishing the vision for change and enlisting support for the desired future state. The desired future state is one where flexi-schooling options are available to students, and as a result, less students leave publicly funded school for homeschooling. Monitoring tools include a force field analysis to confirm

readiness of the system for change. As outlined in chapter two, and noted in Appendix F, the implementation team will also monitor the implementation and readiness for change using a DICE assessment.

Monitoring tools are extremely important to determine required changes to timelines, the addition of supports, and iterative changes to the initial implementation plan (Potosky & Azan, 2023; Reinholz & Andrews, 2020; Stelmach et al., 2022; Walk, 2023). Year 1 will see the transition from the awakening phase to the mobilization phase.

### **Mobilization Phase**

In the mobilization phase during year 1, research department staff will use questionnaires to gather the input of parents that are selecting homeschooling. Similar questionnaires may be used to gather input from staff. The implementation team will validate any assumptions regarding the desired future state using this information. Appendix H highlights these and other suggested tools and processes for monitoring throughout the implementation.

Superintendents will monitor the implementation of flexi-schooling by using existing CCSB deep learning questions during school visits. For example, a superintendent can inquire about any school-based learning partnerships with community groups that have resulted in flexi-school options for students from underserved marginalized communities. As noted in chapter two, research has shown the value of professional learning networks during a change process can affect system-wide improvements (Fullan, 2023; A. Harris & Jones, 2010; C. McGregor et al., 2019; C. Stewart, 2014). Superintendents will use existing family of school networks to monitor challenges and to provide opportunities for the sharing of best practices. The learning network of family of schools has the benefit of established relationships and regularly scheduled meetings for Principals to connect with their family of school superintendent.

Towards the end of year one, the implementation team will produce an evaluation report, or a snapshot in time. The year 1 evaluation report will include summaries of focus group feedback, an indication of any new protocols that have been developed, a repository of artifacts demonstrating the changed practices, and data summaries of the number of students participating in flexi-schooling and the changes to the number of homeschooling students.

Research has shown many benefits to formal evaluations of change initiative including providing credibility to the change initiative, disclosing and making recommended adjustments based on impacts on specific groups, suggesting amendments while providing for continuous improvement, and establishing common understanding and awareness of the change initiative (By & Burnes, 2023; Markiewicz & Patrick, 2016; Neumann et al., 2018; Packard, 2021).

### **Acceleration Phase**

Year 2 and entering year 3 of the implementation encapsulates the acceleration phase. As seen Appendix G, this phase includes monitoring of data related to homeschooling and related to flexi-school implementation. Coherence remains an important strategic approach for the CCSB to leverage existing structures and to combat change fatigue (Dool & Alam, 2022; Khaw et al., 2023; Leflar, 2021).

Superintendents will use the district's school condition index to frame their school visits with school principals. The school condition index will serve as an entry point for learning partnership and learning environment conversations related to flexi-school implementation. The director of education will be able to monitor system implementation through updates to the district and school-based student achievement plans. The implementation team will produce a year-end evaluation report for the senior executive team. Key performance indicators will include the number of homeschooling students, the number of students that moved into part-time

status taking some courses online or at school in addition to homeschooling, measures of increased revenue from students returning to the school system, and the number of schools that have students selecting flexi-school options.

### **Institutionalization Phase**

The final phase of the change implementation takes place in year 3 and encompasses the institutionalization phase. PDSA cycles continue to provide a means to implementation and iterations to the implementation plan.

The implementation team will decide if they are able to disband, as the work of flexi-schooling has become part of many groups of leaders and integrated into existing work plans. As noted by Packard (2021), “Sustainability comes from shared accountability” (p. 161). Evaluation of progress towards institutionalization will help the implementation team and senior leaders determine the sunset date for the implementation team.

Prior to the implementation team winding down, they will produce a final evaluation report, like the year two report, demonstrating progress on each key performance indicator. A final report will go to the executive council, and a public version of the report will go to the board of trustees. Having a sunset clause for old practices or a wind down plan for the implementation team can provide an impetus to the change process while also providing timelines for the enactment of policies and protocols (Keller & Schaninger, 2019; Lines et al., 2015; Packard, 2021, Watkins, 2021). Monitoring along with feedback from both internal and external partners will influence the timing of when to disband the implementation team.

### **Barriers and Inequities**

The CCSB’s focus on coherence and the established practice of distributed leadership will help to address barriers to the desired change. The district has an established practice of

superintendents working with a group of school principals to focus on innovative practices.

Research has shown that system-wide change initiatives that include networking opportunities and the support of superintendents or principals will be in a better position to adapt to challenges (Al-Alawi et al., 2019; Honig & Rainey, 2020; Howard et al., 2019; McLure & Aldridge, 2022).

Given the leadership throughout the CCSB is predominantly White, it will be important to ensure monitoring includes discussions related to racism and oppression. Discussions and leadership actions will be important to ensure that inequities are not maintained (Benson et al., 2023; Khalifa, 2018; Khalifa et al., 2016; Shah et al., 2022b; Theoharis et al., 2023).

Acknowledging privilege is a starting point for leaders in the CCSB; however, addressing the PoP that has seen an increase in homeschooling by families from underserved marginalized communities, will require intentional ethical leadership action. Researchers have shown the positive impacts of leaders as White allies as opposed to a White saviour approach (Finnegan, 2022; Frey, 2016; Olan, 2021; N.S. Roberts, 2021). Throughout the implementation and monitoring of the CIP, it will be important for change leaders to hear directly from those impacted by both the current practices and the proposed future state. Input from members of the community that may have left publicly funded school systems will help with refinements and will shape iterative versions of flexi-school options in the CCSB.

The final section of chapter three will address the next steps in the change process and the future considerations for the CCSB related to the PoP.

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

This DiP has addressed the complex problem of increased numbers of students leaving publicly funded education for homeschooling. The selected solution focused on system wide



implementation of flexi-schooling to ensure coherence (Fullan & Quinn, 2016) between district initiatives that focus on supporting students from underserved marginalized communities.

### **Next Steps**

As noted in previous chapters, my agency is at the macro level and my focus is transformative leadership. This approach challenges the status quo by addressing systemic and structural practices that perpetuate inequities (Shields, 2020). As a next step, change leaders at the CCSB must actively create opportunities for input from underserved marginalized communities. Researchers have shown the importance of involving authentic voices when social justice is a desired outcome. Authentic voices bring meaning to the saying, “Nothing about us without us” (Doucet et al., 2022; Harbord et al., 2021; Koontz et al., 2022; Wilson et al., 2023). This input will shape future iterations of flexi-schooling across the system. The superintendents should actively monitor their specific family of schools and support principals with implementation. This distributed leadership will help with system scale of the change initiative (Fullan, 2019; A. Harris, 2014; Hickie, 2021; Tandon, 2022).

The following plans should include flexi-schooling strategies: strategic plan, equity plan, mental health plan, and the board action plan to support Indigenous students. The inclusion of flexi-schooling options into each of these plans will assist with system-wide reform implementation (Boulagouas et al., 2021; Fragouli & Yankson, 2015; Ghonim et al., 2022; Piotrowska-Bożek, 2019).

Knowledge mobilization should continue to dispel homeschooling myths. Personal stories along with data will add legitimacy to the desired future state (Khalifa et al., 2019; Safir & Dugan, 2021). For example, staff may incorrectly assume that homeschooled students are all introverted students that struggle academically. An articulate student who shares with staff how

racism resulted in them leaving publicly funded education can help to show ways that homeschoolers can contribute to publicly funded education reform.

Achieving institutionalization (Deszca et al., 2020) will allow for transformative change as a next step, one that does not rely on any particular change leader. Monitoring and evaluation will help change leaders assess if cultural change has also occurred along with the structural changes (Schein & Schein, 2017).

### **Future Considerations**

Future leaders in the CCSB will need to monitor power imbalances and politics that may push for a return to the previous status quo (Apple, 2019a; Chunoo et al., 2020; Fuchs, 2021; Rexhepi, & Torres, 2011; Strunk & Locke, 2019). While social justice and a focus on spirit work (Fullan & Edwards, 2021; Rincón-Gallardo, 2020) were integral to addressing the PoP, a change in provincial government or a change in the board of trustees could bring about different perspectives related to those leaving publicly funded education.

The scope of this DiP has focused on homeschoolers. Future considerations may include an analysis of students who have left publicly funded education for private schools. The solution of flexi-schooling may appeal to private school students in a similar manner that it addresses the needs of many homeschoolers.

Finally, while the number of homeschoolers for any individualized district may be a small proportion of the total number of students in the district, recent data shows close to 100,000 homeschoolers across Canada (MacPherson, 2022) and over 3 million (Ray, 2022) homeschoolers in the U.S.A. Applying a critical theory lens to homeschoolers across other jurisdictions is a future consideration to ensure that all students have access to personalized learning environments via publicly funded education.

### **Chapter 3 Conclusion**

The final chapter of the DiP addressed the change implementation plan. The timeline for the change process was aligned to existing CCSB strategic plan cycles of three years. The chapter addressed the important role of communication and knowledge mobilization throughout the change process. Key components for iterative change included monitoring and evaluation. Chapter three ended with suggested next steps and future considerations for the CCSB in relation to the PoP.

On a broader scale, this DiP has shown the urgent need to address inequities in publicly funded education. The trend of increases in homeschooling exists across all districts in Ontario and right across Canada. The pandemic provided a wake-up call for all educators to recognize the inequities that exist for students from underserved marginalized communities. School reform based on transformational change has not worked.

Bold leadership and transformative practices will challenge the status quo around attendance, assessment, curriculum choice, and graduation pathways. This DiP provides a structured pathway for transformative change that blends homeschooling practices within publicly funded education. Will these changes result in third-order change? For the sake of students, I hope so – time will tell.

### **Narrative Epilogue**

I began my doctorate studies at the University of Western Ontario with an interest in learning more about the trend of why there were increased numbers of students leaving publicly funded education for homeschooling. The journey turned out to be much more than a literature review into homeschooling.

My readings and scholarly discussions with colleagues and professors took me on a path of critical theory, with social justice and equity as a focus of my work. As an educator from a faith-based school system, I expanded my world lens and gained a deeper appreciation for my positionality and agency, and the realities of oppression, colonialism, and common challenges across Canada.

Beyond critical theory, several other theories and lenses began to shape my work. These included complexity theory, transformative leadership, social constructivism, personalized learning, and spirit work. Throughout the reading, I became more interested in the elusive goal of third-order change and the role of culture and institutionalized change.

As my career is now much closer to the end than the beginning, I feel energized and empowered to continue to make a difference in the school system, and in the lives of students who deserve the best publicly funded education we can deliver. In the district that I am proud to serve, flexi-schooling options will continue to develop and expand, and as a result, more students will benefit from personalized learning pathways in publicly funded education. My hope is that this work inspires others to take meaningful action to ensure that every student has an opportunity to receive support through flexi-schooling offered as a part of publicly funded education.

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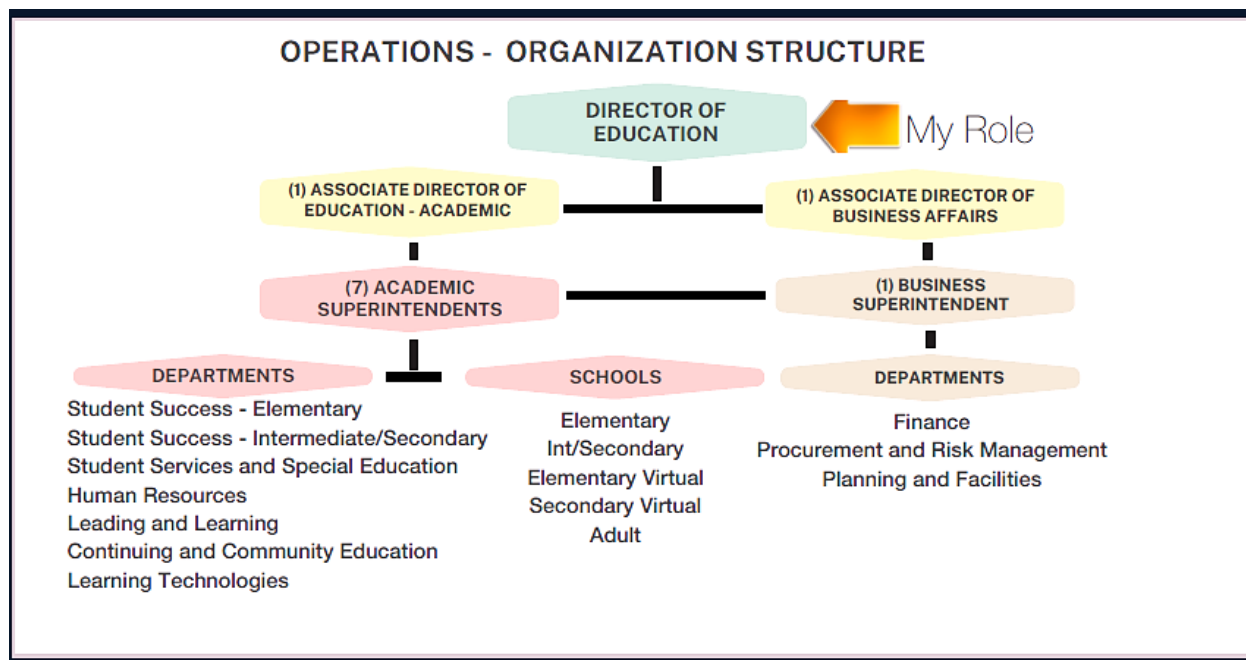
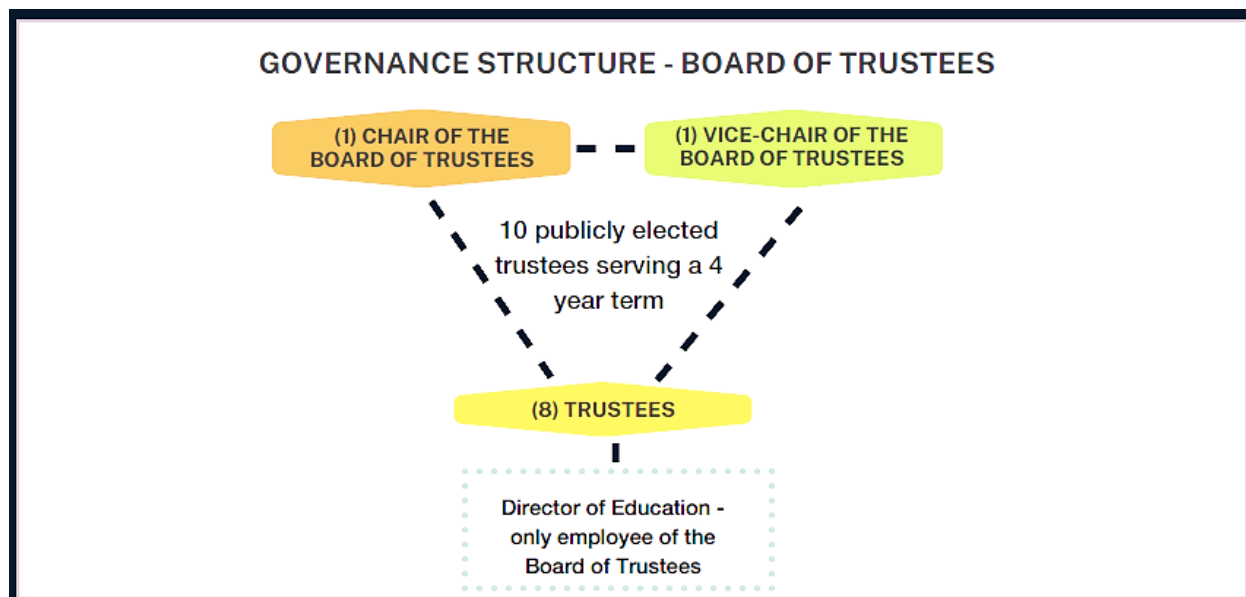
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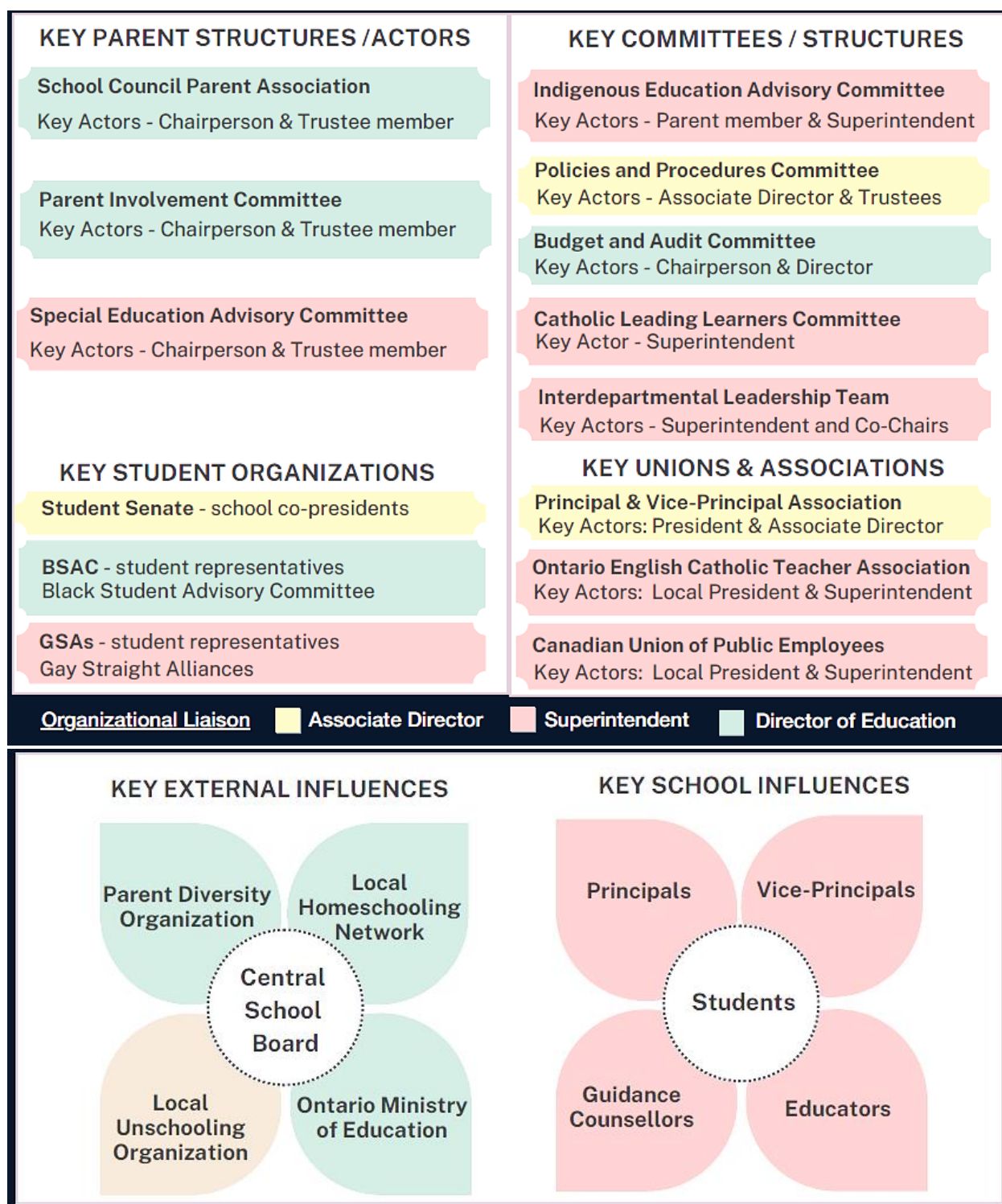
## Appendix A

### Governance and Operational Structure of the Central Catholic School Board



## Appendix B

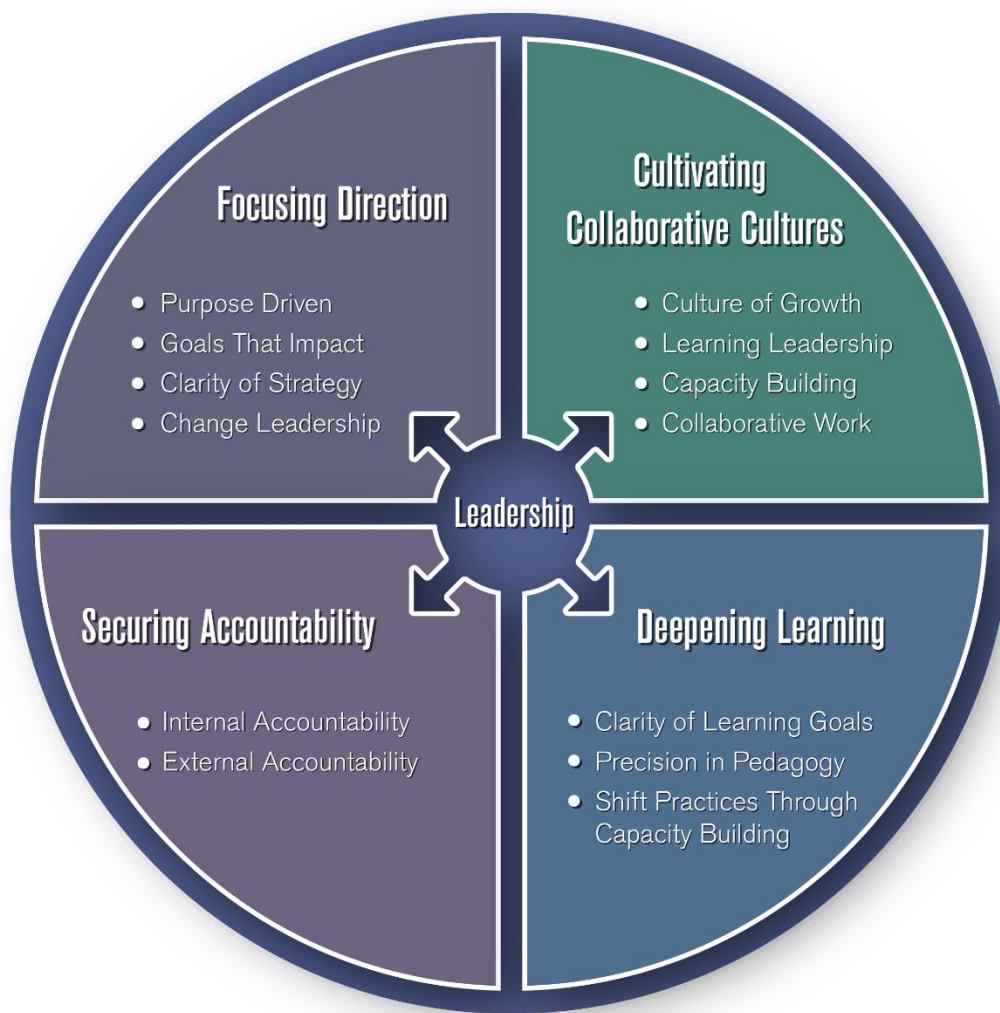
### Key Structures and Actors – Central Catholic School Board





## Appendix C

### Coherence Framework



*Note.* The CCSB uses the coherence model as part of an existing change framework. Central staff leaders are familiar with the model. The change implementation team uses the coherence framework to guide discussions throughout the change process. In addition to the implementation team, the central coherence committee and the interdepartmental leadership team are familiar with the language used in the coherence model. From “*Leading in a culture of change* (2nd ed.),” by M. Fullan, (2020), p. 121. Copyright 2016 by M. Fullan.



## Appendix D

### PESTEL-SWOT Analysis of the Central Catholic School Board

<i><b>Factor</b></i>	<i><b>Key Considerations</b></i>	<i><b>Impact related to PoP</b></i>	<i><b>SWOT</b></i>
Political	Trustee stability for four years until the next Trustee election; Populist government in the province is stable for next 3 years with majority government	The current group of Trustees is committed to a focus on equity and supporting those considered marginalized in our current system	<b>Strength &amp; Opportunity</b>  Support for differentiated initiatives
Economic	Provincial budget cuts and deficit budgets are the reality	Any strategy that results in students returning to the District will increase revenue	<b>Opportunity</b> to change practices - may increase enrolment
Social	Data may uncover that current policies have a greater negative impact on those from marginalized communities	The reasons for those selecting homeschools may be seen as a critique of publicly funded Catholic education	<b>Threat</b>  May create negative reputational damage
Technological	The District has two established virtual schools that could provide more flexible options to students and families interested in hybrid options for learning	Depending on the reason for leaving the school system, the virtual schools may provide more flexibility to address individual needs	<b>Opportunity</b> Post-COVID virtual schools provide new opportunities
Environmental	Increased opposition from small vocal right wing groups that feel “wokeness” is an issue with school Board agendas	Complexity of reasons for homeschooling will become important when responding to criticisms of resource allocation to those traditionally homeschooled	<b>Threat</b> Groups may choose to protest any targeted supports that are differentiated
Legal	Policy and Program Memorandum (PPM) 131 Homeschooling is now 21 years out of date and changes to the regulations could impact District plans for homeschooling	Any change to the legislation could impact District plans for flexible schooling options to support homeschoolers	<b>Weakness</b> The current legislation is outdated

*Note.* Throughout the change process, the PESTEL-SWOT analysis may change. A change in one factor may change multiple factors.

## Appendix E

### Readiness for Change Questionnaire

Readiness Dimension	Readiness Score	Range
<b>Previous Change Experience</b>		
1. Has the district had generally positive experiences with change?	<b>2</b>	0 to +2
2. Has the district had recent failure experiences with change?	<b>0</b>	0 to -2
3. What is the mood of the district: upbeat and positive?	<b>1</b>	0 to +2
4. What is the mood of the district: negative and cynical	<b>0</b>	0 to -3
5. Does the district appear to be resting on its laurels?	<b>0</b>	0 to -3
<b>Executive Support</b>		
6. Are senior leaders directly involved in sponsoring the change?	<b>2</b>	0 to +2
7. Is there a clear picture of the future?	<b>2.5</b>	0 to +3
8. Is executive success dependent on the change occurring?	<b>1</b>	0 to +2
9. Are some senior leaders likely to demonstrate a lack of support	<b>0</b>	0 to -3
<b>Credible Leadership and Change Leaders</b>		
10. Are senior leaders in the district trusted?	<b>3</b>	0 to +3
11. Are senior leaders able to credibly show others how to achieve their collective goals?	<b>1</b>	0 to +1
12. Is the district able to attract and retain capable and respected change leaders?	<b>2</b>	0 to +2
13. Are principals able to effectively link superintendents with the rest of the district?	<b>1</b>	0 to +1
14. Are senior leaders likely to view the proposed change as generally appropriate for the district?	<b>2</b>	0 to +2
15. Will the proposed change be viewed as needed by the senior leaders?	<b>1</b>	0 to +2
<b>Openness to Change</b>		
16. Does the district have scanning mechanisms to monitor the internal and external environment?	<b>2</b>	0 to +2
17. Is there a culture of scanning and paying attention to those scans?	<b>2</b>	0 to +2
18. Does the district have the ability to focus on root causes and recognize interdependencies both inside and outside the district's boundaries?	<b>1</b>	0 to +2
19. Does "turf" protection exist in the district that could affect the change?	<b>0</b>	0 to -3
20. Are principals hidebound or locked into the use of past strategies, approaches, and solutions?	<b>0</b>	0 to -4
21. Are employees able to constructively voice their concerns or support?	<b>2</b>	0 to +2

22. Is conflict dealt with openly, with a focus on resolution?	<b>2</b>	0 to +2
23. Is conflict suppressed and smoothed over?	<b>0</b>	0 to -2
24. Does the district have a culture that is innovative and encourages innovative activities?	<b>2</b>	0 to +2
25. Does the district have communications channels that work effectively in all directions?	<b>2</b>	0 to +2
26. Will the proposed change be viewed as generally appropriate for the district by those not in senior leadership roles?	<b>2</b>	0 to +2
27. Will the proposed change be viewed as needed by those not in senior leadership roles?	<b>1</b>	0 to +2
28. Do those who will be affected believe they have the energy needed to undertake the change?	<b>2</b>	0 to +2
29. Do those who will be affected believe there will be access to sufficient resources to support the change?	<b>1</b>	0 to +2
<b>Rewards for Change</b>		
30. Does the reward for system value innovation and change?	<b>2</b>	0 to +2
31. Does the reward system focus exclusively on short-term results?	<b>0</b>	0 to -2
32. Are the people censured for attempting change and failing?	<b>0</b>	0 to -3
<b>Measures for Change and Accountability</b>		
33. Are there good measures available for assessing the need for change and tracking progress?	<b>0</b>	0 to +1
34. Does the district attend to the data that it collects?	<b>1</b>	0 to +1
35. Does the district measure and evaluate parent and student satisfaction?	<b>1</b>	0 to +1
36. Is the district able to carefully steward resources and successfully meet predetermined deadlines?	<b>1</b>	0 to +1
<b>Change readiness score is 42.5 (note scores can range from -25 to 50)</b>		

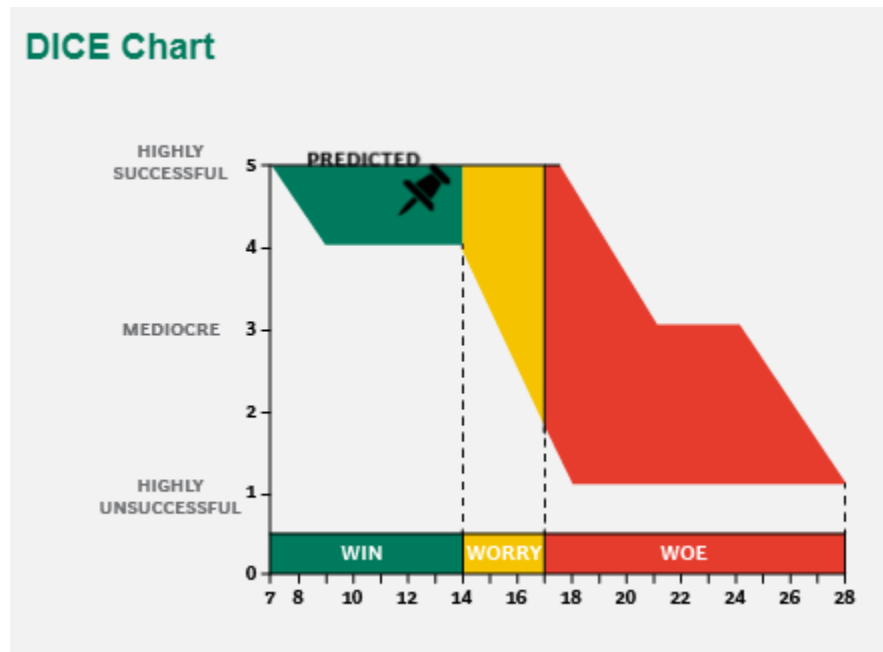
*Note.* Adapted from “*Organizational change: An action-oriented toolkit*,” by G. Deszca, C.

Ingols, and T.F. Cawsey, 2020, p. 113. Copyright 2020 by Sage Publications.

## Appendix F

### DICE Assessment

Element	Result	Score
<b>D – Duration</b> Time between milestones or reviews	Updates to exec council every two to three months	<b>2</b>
<b>I – Integrity</b> Change leader’s skills and credibility	Good to very good	<b>1.5</b>
<b>Commitment</b> Senior Management	Reasonably communicate need	<b>1.5</b>
<b>Commitment</b> Local employee level	Willing	<b>2</b>
<b>Effort</b> Level of increased effort to implement change	10-20% additional	<b>2</b>
<b>Overall Score</b>	$D + 2I + 2C1 + C2 + E$	<b>12</b>



*Note.* DICE result, based on the DICE calculator, shows that the initiative is likely to meet its objectives. From “*DICE calculator*,” by Boston Consulting Group, (n.d.).

(<https://dice.bcg.com/dice-calculator/>). Copyright (n.d.) by Boston Consulting Group.

## Appendix G

### Change Implementation Plan - Year 1 of Implementation

Change Path	Strategies	Process and Tools Monitoring	Outcomes Evaluation
<b>Awakening</b> Change leaders: Director of Education and Superintendents	<p>Establish the vision for change</p> <p>Present vision to senior team</p> <p>Enlist support for the vision from the Chair and Vice-Chair of the Board</p> <p>Enlist support for the vision with key external partners including homeschool association contacts</p> <p>Provide Equity lead and Mental Health Lead with an understanding of how structural changes can support students from marginalized communities and the positive impact on mental health</p> <p>Provide update to central coherence committee and to the interdepartmental committee</p> <p>Provide update of vision to key partners including central staff and school Principals</p>	<p>Collect homeschooling data to support the vision</p> <p>Connection of vision of preferred future state to strategic plan</p> <p>Creation of Implementation team with updates to the Deep Learning monitoring tool to include ideal preferred future state</p> <p>Identify revenue impacts of loss of students</p> <p>Begin assessment of readiness for change for different partner groups</p>	<p>Implementation team created that consists of interdepartmental staff to provide coherence with the change process</p> <p>A Force Field analysis will provide the implementation team with an indication if the system is ready for the change process implementation.</p> <p>PDSA cycle review created to assess the different stages of the change process</p> <p>Implementation team creates updated monitoring and evaluation plan</p> <p>DICE model completion and readiness questionnaires indicate appropriate time to begin implementation</p>

### Change Implementation Plan - Year 1 Transition into Year 2 of Implementation

Change Path	Strategies	Process and Tools Monitoring	Outcomes Evaluation
<b>Mobilization</b> Change leaders: Director of Education and Superintendents, central staff, school principals, vice-principals, guidance and registration and office staff	<p>Personalized stories of those that have left the school system to build emotional connection and to further create a moral imperative for change</p> <p>Expand presentations of the desired future state that has more flexible structures and schooling options. Include key central staff, school Principals, vice-principals, office staff, guidance and registration staff</p> <p>Build support with the Board of Trustees by providing updates at a Board meeting presentation</p> <p>Bring examples of positive successful pilots to the key union leaders</p> <p>Create a program name for the desired future state to show the options available to parents who wish a different personalized learning experience for their child. Include options for location of school, days or hours of school, in-person or virtual or eLearning, working towards diploma or not; taking part in formal assessments or not.</p> <p>Use existing structures of Deep Learning and Coherence to situate the changes within the existing Board change frameworks</p> <p>Spread information through existing parent organizations</p>	<p>Focus groups of homeschool students and research into student profiles of those selecting homeschools</p> <p>Questionnaires and surveys created by research department staff to be used to determine best practices and concerns related to the desired future state</p> <p>Creation of easy to understand infographics and presentations with the assistance of communication department staff</p> <p>Use of the coherence framework and existing family of school structures for each superintendent to gather feedback on the change process and to share best practices</p> <p>Design of questionnaire and observation tools to review changes in culture</p> <p>Create common school visit questions for superintendents to use during school visits with a focus on the four elements of the Deep Learning model</p> <p>Create parent presentations</p>	<p>Results of focus groups will provide stories to be shared re: impact of flexible structures</p> <p>Results of focus groups, questionnaires and PDSA cycle will provide direction for adjustments to the implementation plan</p> <p>A series of branded informational items available to help staff and other partners see the possible options for schooling</p> <p>Implementation team to create a tracking and monitoring repository of best practices and concerns from across the district</p> <p>Modification of existing policies or procedures to allow more flexible delivery options for students</p> <p>Researchers to use appreciative inquiry practices to focus on collecting positive experiences and cultural changes</p> <p>Completion of school visits at each school and gathering of data of number of students that have returned to the school system from homeschooling to take part in the new options available to them</p> <p>Post presentation questionnaires to gauge level of parent interest and understanding</p>

### Change Implementation Plan - Year 2 and Transition into Year 3 of Implementation

Change Path	Strategies	Process and Tools Monitoring	Outcomes Evaluation
<b>Acceleration</b>	<p>Increased access to virtual schools for those that had been homeschooling</p> <p>Monitor school by school impacts through the use of existing school visits</p> <p>Update presentation to senior executive team members and to the Board of Trustees</p> <p>Use of the existing school improvement plan and Board improvement plan to list localized initiatives to support personalized learning experiences</p>	<p>Enrolment monitoring of virtual schools with part-time attendance from those participating in new flexible school options</p> <p>Use the Deep Learning School Conditions Index as part of a school visit</p> <p>Financial analysis of the impact of increased participation in flexi-school options</p> <p>Update to school improvement and Board improvement plans to include flexi-school language</p>	<p>Decreased number of homeschooled students and increased numbers of part-time students</p> <p>Increased number of students across the system taking part in flexi-school options and a targeted increase in those from marginalized communities participating</p> <p>Increased revenue for the Board</p> <p>Report completed to show the number of schools that have flexi-school options as compared to the previous year</p> <p>PDSA cycle monitoring by the implementation team including assessing for artifacts, espoused values, and underlying beliefs</p>

### Change Implementation Plan - Year 3 of Implementation

Change Path	Strategies	Process and Tools Monitoring	Outcomes Evaluation
<b>Institutionalization</b>	<p>Incorporate flexi-school options into existing Board plans as a strategy for mental health, equity and as part of the Board Indigenous Action plan.</p> <p>Include updated training packages for new guidance counsellors, registration staff, and vice-principals so that scheduling and timetabling automatically include options for personalized learning through flexi-schooling for all students</p> <p>Presentation to external homeschool groups and to the Board of Trustees to share success stories</p>	<p>PDSA cycle to confirm full implementation across the system</p> <p>Updates to the resources and infographics as needed has become an annual activity as part of the communication department responsibilities</p>	<p>Disbanding of the central implementation team as the work has become part of many cross-sectional groups of leaders, signifying coherence and transformative impact on the District.</p> <p>Less reliance on transformative leadership, as the distributed leadership practices have now resulted in the practices taking place across all schools.</p>

## Appendix H

### Knowledge Mobilization Plan

Awakening	
Why mobilize knowledge	To develop local solutions to practice-based problems
Whose knowledge	Decision makers responsible for strategies
What type of knowledge	Factual knowledge
How is knowledge mobilized	Facilitating interactive learning
Mobilization	
Why mobilize knowledge	To develop new programs and recommendations
Whose knowledge	Frontline service providers responsible for service delivery
What type of knowledge	Technical knowledge, practical skills
How is knowledge mobilized	Making connections between actors and networks
Acceleration	
Why mobilize knowledge	To change practices and behaviours
Whose knowledge	People in receipt of services and/or their advocates
What type of knowledge	Technical knowledge, practical skills, experience & expertise
How is knowledge mobilized	Disseminating and synthesizing knowledge
Institutionalization	
Why mobilize knowledge	To adopt and implement clearly defined practices and policies
Whose knowledge	Product and program developers
What type of knowledge	Practical wisdom, beliefs and values
How is knowledge mobilized	Making connections between actors and networks

*Note.* Adapted from “Why, whose, what and how? A framework for knowledge mobilisers,” by

V. Ward, 2017, *Evidence and Policy*, 13(3), pp. 477–497.

(<https://doi.org/10.1332/174426416X14634763278725>). Copyright 2017 by Policy Press.



## Appendix I

### Communication Plan

<b>Awakening: Pre-change Phase Developing the Need for Change – Year 1</b>	
Partners include trustees, director of education, central staff leaders, administrators, local union leaders, communication department, board researchers, and superintendents.	
<b>Communication Content</b>	<b>Outcomes</b>
<p>Vision and the need for change</p> <p>Homeschooling data to support the vision</p> <p>Connection of vision of preferred future state with the strategic plan</p>	<p>Vision for change is approved by Trustees and Senior executive team</p> <p>Change vision is understood by identified change agents and leaders</p>
<b>Mobilization: Developing the Need for Change – Year 1</b>	
Partners include the above groups and the following: Educators, parent associations, homeschoolers, parents, homeschooling associations, achievement centre staff, virtual school staff, admissions and registration staff.	
<b>Communication Content</b>	<b>Outcomes</b>
<p>Flexi-school options including: attendance options, virtual school options, eLearning options, assessment options, diploma track options</p> <p>Senior staff call to action and alignment with strategic priorities</p>	<p>District educators and administrators understand the value of the changes to support the District multi-year plan and targeted supports to those from traditionally marginalized communities</p>
<b>Mobilization: Midstream Change and Milestone Communication Year 1 &amp; 2</b>	
Partners include above groups and the following: local ministry of education staff	
<b>Communication Content</b>	<b>Outcomes</b>
<p>Data on students returning to the district part-time with flexi-school option and impact on enrolment and finances</p> <p>Director of Education address to the system to include celebrations of system support</p> <p>Change process is embedded with the Deep Learning framework elements of: pedagogical practices, learning partnerships, learning environments, and leveraging technologies; and embedded in Equity framework and Mental health framework</p>	<p>Focus groups and questionnaires are used to adjust the change plan</p> <p>Trustees and members of the executive team are provided with formal presentation updates</p> <p>Communication staff develop and brand resources to support the flexi-school options</p> <p>Homeschooling students, parents, and homeschooling associations are updated on the progress</p>

<b>Acceleration: Midstream Change and Milestone Communication – Year 2 &amp; 3</b>	
Same groups continue to be key partners in year two implementation of the change process.	
<b>Communication Content</b>	<b>Outcomes</b>
<p>Success stories as milestones shared by external homeschooling groups</p> <p>Staff continued sharing of strategies and challenges</p> <p>Central staff and administrator focus groups share best practices</p> <p>Superintendents review strategies during school visits and share data with school admin team</p>	<p>Trustees and members of senior executive receive presentation updates and impacts of enrolment on finances</p> <p>Community celebrations of flexi-school options and personal stories of success</p>
<b>Institutionalization: Confirming and Celebrating the Change – Year 3</b>	
Same groups continue to be the key partners in year two implementation of the change process.	
<b>Communication Content</b>	<b>Outcomes</b>
<p>Celebration of progress since year one with more schools and student uptake</p> <p>Flexi-school options are celebrated as good for all students</p>	<p>Yearly presentation to board moved to alternate year cycles</p> <p>Incorporate into new admin on-boarding</p>