A CEO's Five Year Journey: Translating Theory into Practice

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Introduction

School district leadership is essential to systemic improvement of our school systems! While there are many examples of successful schools that are professional learning communities, these are isolated cases, and unfortunately, we have evidence that many of these professional learning schools are not sustained when key leaders move from the school (Giles & Hargreaves, 2006). As a result of our work over the last decade or so that has been focused on developing schools as learning organizations, we have been convinced that schools, for the most part, continue to operate as traditional bureaucratic organizations that are highly resistant to organizational learning. Often intervention and sustained external pressure and support are required to bring about change (Sheppard, 2003; Sheppard & Brown, 2000c). In fact, our research suggests that,

> We cannot assume that all educators endorse team leadership or organizational learning as a means to successful change…. Furthermore, we learned that one cannot assume that those who are willing to accept the potential of team leadership and organizational learning will be able to make the shifts in leadership approach without effort or difficulty. (Sheppard, 2003a)

Our analysis of one school district CEO's[1] practice led us to conclude that neither shared leadership, organizational learning, or changes in other school and classroom practices is likely to happen without the strong leadership of the CEO. Similarly, Louis, Toole, and Hargreaves (1999) conclude that, "the most recent literature suggests that we need to reassert that [while] the school is a critical focus, …without stable policy environments and resources outside of the school, the chances of enduring change are limited" (p. 269). This position has been reiterated more recently, as well (Fullan, 2005; Giles & Hargreaves, 2006). For example, Fullan (2005) laments the fact that many jurisdictions have set in play "deliberate strategies from the state level [that] have played down or bypassed the district" (p. 65). It is his contention that such actions are ill founded and that, "If you have your systems hat on, you know right away that this is a mistake. You cannot omit any part of the system without paying the price" (p.65). He emphasizes the importance of the district role in the provision of leadership, noting that schools differ in their capacity to engage in continuous improvement; therefore, if the

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[1] *CEO* is to be interpreted as a the most senior administrative position within a school district with the dual responsibility of Chief Executive Officer and Chief Education Officer.

system is to be changed, districts must foster across school and across district sharing and capacity development.

Even though the critical nature of district CEO leadership to sustaining school and school district improvement is well documented (Fullan, 2005; Maguire, 2004; Teitel, 2006), there exists a scarcity of evidence related to the role of CEOs in bringing about these improvements (Leithwood, 1995; Leithwood, Louis, Anderson, & Wahlstrom, 2004). In particular, our evidence is very thin in respect to our understanding of the challenges faced by a district CEO who ascribes to emergent leadership principles such as inclusiveness, collaboration, team learning, and shared decision-making as a means of fostering organizational learning in a district where the accepted model of leadership and administration is a top-down hierarchical bureaucracy. Leavitt (2003) recounts problems encountered by Mike, a rookie manager, who did not fully comprehend the hierarchy reality. As a result of his naïve understanding of emergent leadership concepts of shared leadership, teamwork, and empowerment, he implemented these ideas fully without consideration of the hierarchical context. As a result, he did not remain fully informed of the details of activities that were happening in his area of responsibility. When he met with his executive committee, they expected him to know the details and the result was disastrous.

In the context of the pervasiveness of hierarchy in our school boards, the purpose of the research presented in this paper is to contribute to the empirical evidence related specifically to the following question: How might a district CEO foster organizational learning in a district that is a traditional bureaucratic hierarchy? While exploring answers to that question, we will particularly focus on the limitations imposed by the hierarchical bureaucratic leadership paradigm operating within the school district and the ideas, methods, and structures employed by the CEO to implement emergent leadership and to foster organizational learning in the district.

The Conceptual Framework

This paper is set in the context of a focussed research agenda on educational leadership and organizational learning that the authors have pursued over the last decade (Brown, Dibbon, & Sheppard, 2003; Brown & Sheppard, 1999; Sheppard & Brown,

1996, 1997, 1998, 1999, 2000a, 2000b, 2000c; Sheppard, Brown, Genge, & Walters 1996, Sheppard, 2003). In this particular paper, our focus is on district-level leadership. The theoretical framework for our research and reflective practice is what we will identify as emergent leadership. It draws extensively upon our own work as well as the work of others, with specific reference to the following: (1) Non-Educational sources: Kouzes & Posner (2003), O'Toole (1996); Senge (1990) and (2) Education Specific sources: Fullan (2005); Hall & Hord (2006); Leithwood, Louis, Anderson, & Wahlstrom (2004). The basic tenets of the emergent leadership approach as described in this paper are based on concepts of leadership that are transformational, inclusive, value-based, and focused on organizational learning and the achievement of purposes that transcend the surface constituent noises of pettiness and self interest. Guided by an emergent leadership approach, a leader would be expected to establish and maintain credibility, understand the theoretical frameworks related to organizations, administration and change, and be able to apply theory to practice within the differing contexts. Such a leader would attend effectively to the technical core as an instructional leader, and would attend, as well, to the administrative, managerial, and institutional systems that include the financial, legal, political, human resource, and symbolic roles (Barth, 1990; Bolman & Deal, 1992; Cuban, 1988; Hoy & Miskel, 2005).

The emergent leader recognizes that leadership success is contingent upon the perceptions of the constituents, those that are to be led (Angus, 1989; Blasé, 1993; Blase & Blase, 1998; Foster, 1989; Gardner, 1990; Hallinger, 2005; Kouzes & Posner, 2003; Lord & Maher, 1990; Marks & Printy, 2004; Sergiovanni, 1995). Kouzes and Posner (2003) contend that "leadership is personal…If people don't believe in the messenger, they won't believe the message" (p. xv). Similarly, Sheppard (1996) found that instructional leadership behaviours that were accepted as appropriate by teachers were more likely to gain their support and, therefore, have a transformational effect on them. Kouzes and Posner (2003) refer to this as the leader's credibility. O' Toole (1996) recognizes it as "enlisting the hearts and minds of followers" (p 11).

These emergent concepts of leadership have remained theoretically robust, but have not found their way in mainstream practice of chief executive officers in our corporations, government, or education (Leavitt, 2003). Kouzes and Posner (2004)

contend that "the dominant metaphor of our time is still the hierarchy, organized by rank and authority" (p. 3). The most popular acceptable leadership models focus on one person (usually charismatic) who engages in top-down management using one of three generic approaches to leadership: command, manipulate, and paternalize (O'Toole, 1996). O'Toole asks, "How can…a CEO…overcome resistance to change [to a differing model of leadership] when the CEO's power is constrained by diverse and conflicting interests of investors, board members, union chiefs, environmentalists, government regulators, and careerist fellow managers, all intent on marching to the beat of their own drummers?"(p.7).

Methodology

In writing this paper, the thinking and reflections of the CEO are intertwined with the interpretations of the university researcher; therefore we have written the paper using the third person, even though the CEO is one of the co-authors (Sheppard). This is important as we are emphasizing the role rather than the personality of the CEO. Prior to Sheppard's assuming the role of CEO, both authors had been involved in Driftwood School District as critical friends and action researchers focused on the development of schools as learning organizations. Becoming the CEO presented an opportunity for "real" participatory action research in a district that would be led by a CEO who understood theoretical frameworks related to emergent leadership and organizational learning and was committed to applying them to practice. The other researcher (Brown) continued to be a participant observer as the university partner acting as a critical friend and researcher. As used in this paper, a critical friend is,

> A trusted person who asks provocative questions, provides data to be examined through another lens, and offers critique of a person's work as a friend. A critical friend takes the time to fully understand the context of the work presented and the outcomes that the person or group is working toward. The friend is an advocate for the success of that work. (Costa & Kallick, 1993. p. 50)

The CEO kept a journal throughout his five-year term as CEO particularly of his involvement in attempting to foster organizational learning in the district. His journal that included links to district documents and personal reflections, together with in-depth

interviews and aggressive interrogations of his actions and thought processes conducted by the university researcher, compose our primary data sources. As well, the university researcher collected qualitative data through interviews with board trustees and detailed notes taken during her involvement in various retreats, workshops, and meetings that she facilitated with teachers, principals, district office staff, and board trustees. She was an observer as both a participant-as-observer (observers engage with the participants, but the participants are aware that they are being observed) and as an observer-as-participant (participants are aware that they are being observed and the observers remain separate from the participants) (Martella, Nelson, & Marchand-Martella, 1999). Interview protocols; analysis of documents, field notes, and the CEO's journal were grounded in the emergent leadership literature. Survey data on leadership and organizational learning were collected in 1999 and 2004 from all teachers throughout the district. While analysis of these data was not employed specifically for this paper, descriptive data from these surveys provide contextual knowledge that informed analysis of other data.

Hierarchical Bureaucratic Leadership Context

Within days of assuming the position, the CEO recognized that the mental model of leadership that was the most pervasive in Driftwood School District was one that placed the leader as the "person in charge." Initial separate meetings with the three assistant directors confirmed for the CEO the existence of the traditional bureaucratic model. Each assistant director was unequivocal that the district had been run as a traditional hierarchical bureaucracy. It was apparent that hierarchy was a reality that, for the most part, they accepted as an organizational reality. Two of the assistant directors stressed that the CEO's office (CEO and executive assistant) was set apart from the remainder of the organization, being clearly placed at the apex of the organization as demonstrated through power-over relationships and the symbols of the office. When the CEO or his executive assistant requested something, everyone understood that it took precedent over all other priorities. As for symbols of power, during special occasions, such as Christmas or Easter, special recognitions or decorations were distributed in a hierarchical fashion with the most flamboyant going to the CEO's office. Similarly, designated parking areas were arranged preferentially according to the hierarchy.

One assistant director was anxious to move forward with a shared decision making model for the district with a focus on students. A second assistant director indicated that he preferred to continue to work alone within his zone of authority and essentially viewed collaboration as a waste of time. He believed organizational learning and collaboration to be theoretical constructs without merit in practice. He indicated that he had worked at the district level for more than 15 years and that, in his view, the only model that worked was the bureaucratic hierarchical model. He had worked with CEOs that tried to operate using a more collaborative model and they were unsuccessful.

A third assistant director confirmed that throughout his entire career of more than 20 years at the district level, and having worked with four previous CEOs, the only model that he knew was hierarchical. While he was willing to go along with a more participative model of leadership; he was skeptical that it would work. In his view, other assistant directors, program specialists[2], and principals did not have the skills or the will to participate in financial decision-making. Each group appeared to be self-centered in respect to budgets, wanting more for their specific field or school while using a zero-summed approach. In his view, strong decisive, directive leadership was required.

Informal interviews with school principals and other staff, and casual observation revealed that staff morale was poor and trust levels were very low between management and staff throughout the district. There were dozens of outstanding grievances and the relationship between management and staff was one of “two solitudes”. In a preliminary meeting with union officials for support staff, this was confirmed. Union officials stated that they and their members perceived district administrators to be arrogant and inflexible and they claimed that the board followed unfair labor practices. It is interesting, however, that while support staff and union officials were discontented, they did not associate their discontent with the hierarchical structure. In fact, they were relying upon that structure to “fix” their problems as they called upon the new CEO to use his power to change the labor climate. The assistant director responsible for labor relations recalled the details of the first meeting between the union president and the new CEO in which the union president described the poor labor relations climate in the district. The president

[2] Program support personnel who acted as staff developers and program coordinators for the various grade levels and subject areas.

demanded that the CEO remove current district labor relations personnel from their role, claiming that they were the cause of all labor problems in the district. He was quite disappointed when the CEO indicated that he (the CEO) was willing to work with the union and current district staff to resolve the outstanding grievances, but he was not willing to act unilaterally to deal with outstanding labor issues (personal communications, assistant director, February 20, 2006).

Emergent leadership was not consistent with board norms of practice either. Board meetings were conducted following *Roberts' Rules of Order*. As a result, decisions were made in a win/lose model following the debate of possible solutions put forth as motions that were either approved or rejected. Such a model is contrary to all principles of dialogue and collaboration that are essential to emergent leadership (Doyle & Straus, 1982; Newton & Tunison, 2003). *The Schools Act 1997* (2005) required that the CEO attend all meetings. His role was to provide advice as requested and to respond to questions of board trustees. While the CEO was successful in having all assistant directors join him at board meetings, the board was quite clear in their expectations. Assistant directors were welcomed at meetings, but they would be resource persons for the CEO who was the only person directly answerable to the Board. They expected that the CEO would respond directly to all their questions and that he "must" be well-informed on all issues. In their interpretations of *The Schools Act 1997* (2005), the CEO was their only employee. He was directly accountable to the board while all other employees were accountable to the board, through him.

The CEO observed that the media held a very traditional hierarchical view of leadership, as well. They appeared to hold an underlying assumption that the CEO and the board make all decisions, and they were quick to publish any story that might negatively reflect on the board or the CEO. Often, the media appeared to sensationalize issues and to be supportive of calls to have either the Minister of Education or the Premier overrule board decisions with no deference to the *Schools Act 1997* (2005), thereby perpetuating in the public forum an acceptance of the dominate model of hierarchy. For example, several editorials written by parents and the editor of a local newspaper contained derogatory comments about both the board and CEO and called upon the Provincial Government to intervene.

Other external groups brought similar expectations that attributed the power of hierarchical control to the CEO. For example, the Deputy Minister of Education was not happy about the financial state of the board. Shortly after the CEO's appointment she requested a meeting with him with an expectation that he would have a plan to eliminate the deficit. Similarly, parents expected the new CEO to address concerns that they had, and expected that he would have answers within days of assuming the CEO's position. This was particularly relevant to the ongoing school consolidation issues (school closures).

There is no doubt that Driftwood School District had been operating as a bureaucratic hierarchy. While several schools, with the approval of district administrators had been engaged in an organizational learning research and development partnership initiative with university critical friends, this initiative was viewed as a project that might have some implications for school development. It was not viewed as having implications for how the district was led or administered.

Implementing Emergent Leadership: First Steps

It appeared that the existing structures and norms were barriers to systems thinking and team learning. They perpetuated mental models that inhibited improved practice and limited opportunities for personal mastery. Any shared vision existed at the school-level only. The essence of organizational learning--knowledge acquisition, knowledge sharing, and knowledge utilization--would be inhibited if the district did not adopt a more robust structure to facilitate district-wide learning (Barth, 1990; DiBella, Nevis & Gould, 1996; Dufour & Eaker, 1998; Fullan, 2001; Hargreaves, 1997). Fullan (2001) opined that, "If they ever discover how to [get schools to learn from each other] their future is assured" (p. 93). Senge, Roberts, Ross, Smith, & Kleiner, 1994 state that "a new understanding of the process of organizational change has emerged. It is…participative at all levels—aligned with a common understanding of a system" (p. 89).

The CEO was convinced that change was required to improve student learning in the district. Further, he was convinced that the necessary change would not occur

without the adoption of an emergent approach to leadership that would foster organizational learning. His challenge was to alter the model of leadership and the organizational structures that would allow for organizational learning in each school and the district when the belief systems and entrenched leadership and organizational models were those symptomatic of top-down hierarchical bureaucracies. Accepting the assumption that leadership success is contingent upon the perceptions of constituents, he concluded that if organizational learning were to occur in the district, it would have to operate within the reality of the hierarchy. The focus would have to be on reducing the negative impacts of that reality by promoting the emergent leadership agenda to the limit of the constituents' level of tolerance. He knew that if he employed a leadership approach that was not within the accepted tolerance levels of the existing "mental models" of the majority of the organization's constituents, it would not likely be successful. This would not mean subordinating his perspectives to those held by others, however. Just adopting the most common leadership practices to please others would not be leadership. O'Toole (1996) cautioned that while a leader must consider the fundamental values and perspectives of followers, he/she must avoid "the too common political practice of pandering to the base wishes of the lowest common denominator—promising whatever the masses think they want" (p. 9-10). He/She must constantly test the limit of public tolerance for change that will inevitably involve trial and error as the limit is pushed beyond that which is acceptable. But the essential value throughout this process must be respect for people (O'Toole, 1996). Similarly, Kouzes and Posner (2003) contend that a leader must have a "clear sense of direction [and] sometimes…should listen to [his/her] conscience and... intuition, instead of [his/her] constituents" (p. 269).

The CEO determined that he would introduce the emergent model of leadership as an innovation. He would mandate the model up front while recognizing that implementation would occur within the existing hierarchical context, and that it would be a process that would be developed over time (Hall & Hord, 2006). He recognized that the skills involving fundamental new ways of thinking and interacting would take years to master. "Deep beliefs and assumptions are not like light switches that can be turned on and off "(Senge, Roberts, Ross, Smith, & Kleiner, 1994, p. 22). It would be important,

therefore, to introduce the model "with sufficient drama and flair that people [would] believe things [were] going to change" (Schlechty, 1990, p, 134). In the process of implementation, the organization would engage in the domain of action: working with guiding ideas, making innovations in infrastructure, and working with theoretic frameworks, methods, and tools that would foster emergent leadership (Senge, Roberts, Ross, Smith, & Kleiner, 1994). "For a long time it [might] appear that there [was] nothing going on except the surface activity of the [Domain of Action]. People [would] talk about new ideas. They [would] practice the application of tools and methods. They [would] design and implement changes in infrastructure" (Senge, Roberts, Ross, Smith, & Kleiner, 1994, p. 44). This would lead, over time, to the deep learning cycle which is the "Domain of Enduring Change" when new skills, new awareness and sensibilities result in new attitudes and beliefs. Guided by the above noted assumptions, the CEO determined that he must begin the implementation of the emergent leadership approach through the "Domain of Action". In the first instance, it was essential to clearly articulate the "guiding idea," his vision of leadership and his role as CEO and what constituents should expect, noting, as well, that this vision should be viewed as being key components of the role of other district leaders, including school principals (Schlechty, 1990).

Once the emergent approach to leadership was mandated as the "guiding idea" or vision for leadership in the district, the next step was to begin the implementation process starting with changing administrative structures and introducing the theoretical frameworks, strategies, and methods that would support realization of the vision. This would include setting up administrative structures in support of team leadership and shared decision-making, helping principals to develop skills of emergent leadership, learning about and fostering dialogue, redesigning professional development, developing a shared vision of teaching and learning, redeveloping the strategic planning process, and developing a new strategic plan. We will not discuss all the implementation strategies in the paper. Instead, we will focus on just one: setting up administrative structures in support of team leadership and shared decision-making.

Changing Organizational Structures in Support of Emergent Leadership

The CEO understood that many of the constituents had some involvement in forming the existing structures and therefore, felt some ownership of them. It was important, however, to make structural changes that would allow for organizational learning and signal to constituents that the CEO's talk was being followed by action. These changes would, nevertheless, have to remain within the constituents' level of tolerance and there would have to be established a delicate balance between high expectations and accountability for change and the provision of support and capacity building opportunities.

The existing administrative structures included Administrative Council (the CEO and assistant directors), General Advisory Council (selected representatives of program specialists and principals), Program Specialists' Meetings, and Principals' Meetings (principals, program specialists, and administrative council). The only administrative structure with decision making authority was Administrative Council where the model of decision-making was one of debate with the final decision taken by the CEO. The General Advisory Council had been constituted to provide advice to the CEO. Program specialists' meetings, chaired by the assistant director of programs, were held bi-weekly. In these meetings, program specialists made decisions related to teacher professional development and the implementation of new programs. The model of decision-making employed at Program Specialists' Meetings, similar to that employed at Administrative Council Meetings, was hierarchical. Principals' meetings occurred approximately four times per year for the purpose of administrative updates and dissemination of materials from district-level personnel. Principals had no formal role in decision-making for the district. In fact, there existed no structure that supported participatory leadership at the district level.

A New Approach to Administrative Council

In the revised structure, Administrative Council would meet one day per week, rather than twice per month as was the practice, and decisions were to be made by consensus. In the past, Administrative Council had made most decisions that were disseminated as directives to the followers. As well, the meeting model had been very

traditional as manifested by advocacy, debate, and decision-making by majority or exercise of authority. Typically, majority support for an idea was sought outside of the meeting and debate was often of a perfunctory nature. The CEO perceived that groupthink (Janis, 1982) was a real danger in the current model of operation, particularly, as individuals tried to gauge his views and to win his confidence. In response to that perception, the CEO presented the concept of dialogue (Senge, Roberts, Ross, Smith, & Kleiner, 1994) as a process that should occur prior to any decision-making process. He explained that,

> The intention of dialogue is exploration, discovery, and insight. In a dialogue session people feel involved and welcomed, no hierarchy exists and disagreement is encouraged. Participants feel that it is safe to express and explore ideas or differing views, even those ideas that are not fully developed. While the group may in fact sometimes reach agreement through dialoguing, that is not the primary purpose. (Administrative Council Meeting Minutes, May 31, 2000)

Unfortunately, the concept of dialoguing appeared to be poorly understood by the group and was perceived, at least by several members, as a naïve approach to meetings of senior district administrators, and that it was really not efficient use of time. One assistant director expressed the view that he did not believe that dialoguing could be achieved and that it was not a good idea anyway. In spite of repeated efforts to engage in dialoguing through demonstration and clarification, there were few examples of where such sessions occurred in “pure” form either in Administrative Council or in any other of the formally structured groups. However, it appeared that efforts to foster dialogue did improve the level of engagement and encouraged the expression of differing viewpoints.

Review of minutes and agendas of Administrative Council meetings revealed that at his second meeting of Administrative Council (May 31, 2000), the CEO introduced a discussion related to employing research evidence to inform practice, and presented a power point presentation of Senge’s Five Disciplines of learning organizations. He introduced DiBella, Nevis, and Gould’s (1996) definition of organizational learning that focused on knowledge acquisition (the development or creation of skills, insights, relationships), knowledge sharing (the dissemination to others of what has been acquired by some), and knowledge utilization (integration of the learning so that it is assimilated, broadly available, and can also be generated to new situations (p. 363). As well, he

introduced evidence from his own research (Brown & Sheppard, 1999; Sheppard & Brown, 1996, 1997, 1998, 1999, 2000a, 2000b, 2000c; Sheppard, 2003a, 2003b) in support of organizational learning and emergent leadership. Additional specific items on that agenda included the need to shift decision making authority to the school level and to engage school personnel in district-level decision-making.

Establishing General Administrative Council

A review of minutes of Advisory Council meetings revealed that this group had met only twice in three years and there had been no recent meetings. The outgoing CEO had recommended disbanding it as did the assistant directors and, with the exception of a small minority, program specialists concurred. As for principals' meetings, the new CEO believed that information could be more efficiently disseminated through correspondence, particularly since district-wide email software had just been installed.

Both the Advisory Council and principals' meetings were replaced by a General Administrative Council (GAC) that would have decision-making authority within the district. Membership of GAC included all principals, program specialists, assistant directors, the comptroller, the human resources administrator, and the CEO. This group met in six week intervals and as priorities dictated (approximately 10 meetings per year) to engage in dialogue and decision-making around key issues in education. This new structure would prove to be a significant structural change in support of the CEO's vision of developing a model of emergent leadership throughout the entire district.

At the first meeting of GAC, the CEO presented a general overview of the new structures that would support the development of organizational learning. [See Figure 1 for his opening address]. During this address, the CEO emphasized the shift in leadership toward emergent approaches that would foster organizational learning. He recognized the bureaucratic, hierarchical context of their work and noted that change would take place over time as GAC worked collaboratively to design and implement changes in structure and practices. As well, he introduced the concept of action learning as an essential component of organizational learning (see Figure 2).

The model of action learning presented was one developed by Sheppard and Brown (2000c) in our work with Pine Wood Alternative School (PWA). Our work with

PWA brought us to a new level of understanding of the stages of the implementation process: assessment, planning, implementation, and evaluation (Stoll & Fink, 1996). While these stages are often presented as a cyclical process (see Figure 3), often, in practice, they remain very linear as the planned implementation moves from one stage to another over time irrespective of progress. Whether or not it is presented in a circle graphic or as a straight line, it remains a linear process. Learning from this experience, the PWA Steering Committee approached action learning as a more in-depth process. In response to what we had learned, we developed a new action learning model based on the following assumptions:

- Change efforts when treated as established programs, and not unfolding processes, almost always fail.
- Implementation occurs as a process that is dependent upon experimentation, rather than a prescribed plan.
- Change is a process of action, reflection, and adjusting course on an ongoing basis (not re-evaluating only at specified assessment points).
- Change is complex and multiple learning cycles occur simultaneously around each of the primary foci of assessment, planning, implementation and evaluation.

While the PWA steering Committee found the new model to be complex and time consuming, they recognized that it contributed to their ability to learn on the basis of ongoing feedback. They no longer equated planning with implementation, or implementation with success. They had come to realize that they needed to employ an action learning cycle for all actions, including information gathering. Each component of the action learning cycle was subjected to multiple learning sub-cycles (as shown in Figure 3). Evidence from the PWA study supported previous research findings (e.g. Elden & Levin, 1991; Whyte, Greenwood, & Lazes, 1991) that action research facilitates organizational learning because it provides opportunities for participants to learn how to learn. As a result of this PWA study evidence, the CEO was convinced that it was essential that he introduce this action learning tool to GAC.

As well, at this first GAC meeting, the CEO introduced another structure that would connect to GAC, the Family of Schools (see Figure 4). He noted that,

> Each Family of Schools will be linked to the district through a program specialist who will be a "District Champion" for these schools. This will require a change in the role and function of the program specialists who would operate in a mirror image-plus role (Figure 5) (Galbraith, Lawler III & Associates, 1993). While they will continue to hold their mandated responsibilities, the new role will help them fulfil that mandate more effectively. The look and feel of the Family of Schools will evolve over time. We are asking that you will begin to set the parameters for that new structure today. (GAC Minutes, September 2000)

The Families of Schools

Families of Schools were clusters of 6-10 schools of similar grade levels. Each cluster was facilitated by one or more program specialists. The Families were responsible for teaching and learning, school development, and school councils[3]. GAC members led each Family of Schools and the Families of Schools became the primary operating units of GAC. In GAC meetings, each member of GAC participated in Family meetings. Beyond GAC, the Families of Schools provided the mechanism by which teachers and support staff workers were engaged in across-school leadership and shared decision-making as they planned learning events, engaged in school development, and learned together.

Both GAC and the Families of Schools were designed to facilitate the needed district-wide engagement of teachers and support staff in decision-making and would support the district goal of organizational learning and capacity building. The need to build capacity at the school-level and to include teachers as partners in educational reform has been well documented (for example, Dufour, 1999; Fullan, 2001; Hall & Hord, 2006; Leithwood et al, 2004; Leithwood, Jantzi, & Steinbach, 1999; Hargreaves & Evans, 1997). Hall & Hord (2006) contend that organizations are composed of individuals and only learn as individuals learn. Consequently, while many change processes can be directed toward various groups, in final analysis, it must be recognized that "successful change starts and ends at the individual level" (p. 7). Among district conditions that have been identified by Leithwood et al. (2004) as contributing to

[3] A school council is a democratically elected advisory group consisting of parents, community representatives, students, teachers, and the school principal whose purpose is to develop, encourage and promote policies, practices and activities to enhance the quality of school programs and the levels of student achievement in a school.

improved student learning is having the district structured to facilitate collaboration and professional learning within schools, between schools, and district-wide. Already, there existed a model of in-school learning and school-based decision-making through school improvement processes that had been in vogue for over a decade; however, in this respect, each school operated as an island. There was practically no across-school knowledge sharing and other than the inclusion of teachers or support staff on various ad hoc district committees, there was no opportunity for them to influence district decisions. The district norm for interactions among schools was one of competition and one-upmanship, rather than collaboration. “Schools [were]…terrible at learning from each other” (Fullan, 2001, p. 92); therefore, capacity building was limited.

The learning network that was created and the capacity that was built, through the GAC and the Families of Schools contributed significantly to developing district-wide learning. As capacity grew within the district, not only did the schools within each Family work together, but they included schools from other Families (their Cousins), as well. The Families of Schools implementation facilitated the development of a critical mass of leaders who began “to think in bigger terms and to act in ways that affect[ed] larger parts of the [district] a whole” (Fullan, 2005, p.27).

Shared Decision Making Matrices

While the new administrative structures and changing roles facilitated shared decision-making at GAC, it was just an initial step. Principals, teachers, support staff, program specialists, and other district-level personnel had heard this before, but there was no culture within the board of shared decision-making. The words had often been articulated and promises had been made, but in practice, they had experienced a continuation of the traditional models of top-down management where decisions were made through a hierarchical system of power and authority based on formal organizational roles (Dunlap and Goldman, 1991). They had become quite cynical of any mention of terms like empowerment and shared decision-making, assuming that it was just another case of downloading of responsibility and increased accountability while those at the top made all the important decisions.

In order to advance shared decision-making at GAC, the CEO drew on the work of Wynn and Guiditus (1984) who argued that if shared decision-making was to be effectively implemented in an organization, the powers and rights of the various groups and individuals in respect to decision-making would have to be specifically defined (see Figure 6). They proposed that this could be accomplished through the development of decision-making matrices. The CEO introduced this concept to Administrative Council and sought their support to introduce decision-making matrix development at GAC. GAC decided that two decision-making matrices would be developed initially: (1) teaching and learning and (2) repair and maintenance.

The process of developing both matrices at GAC proved to be an excellent introduction to shared decision-making. It provided opportunity for GAC members (1) to practice dialoging as they brainstormed to identify issues and the systems interactions that influence and inform decision-making in each area, and (2) to learn about and practice consensus building strategies as they made decisions about the level of power and the rights that were most appropriate for each of the groups and individuals who were included in the matrix. The process helped overcome the skepticism related to the CEO's commitment to shared decision-making and improved the level of trust. As well, it may have contributed to the enhancement of the CEO's leadership credibility as he was called upon to resolve complex problems throughout the process (Gardner, 1990; Kouzes & Posner, 2003). Gardner (1990) has argued that, "A loyal constituency is won when the people, conscientiously or unconscientiously, judge the leader to be capable of solving their problems and meeting their needs" (p.28).

The matrices defined the interaction between the district and schools and moved much of the decision-making authority from district-level personnel to GAC members, most significantly, to school principals who engaged teachers and other staff in shared decision-making within their schools and then act as linchpins between schools and the district at GAC. Within school and across school capacity building and participation in decision-making was facilitated further by a simultaneous shift in both school development and professional learning processes within the district. These aforementioned shifts in school development and professional learning emphasized

organizational learning principles and provided increased professional autonomy and decision-making authority to teachers.

Discussion and Conclusions

The level of public support for education is difficult to gauge, but it is painfully obvious that confidence in public education has declined over the last few decades (Dufour, 2004; Dufour & Eaker, 1998; Fink & Brayman, 2006; Goodlad, 2001, Hepburn, 1999, 2005; Young & Levin, 2002; Reeves, 2002; Sarason, 1990; Sergiovanni, 1995). Hepburn (1999) states, for example that, "the Canadian system of public education is inefficient and inadequate [and that] public-opinion polls show that confidence in the system is at a 30-year low. If it is not to become obsolete, Canadian education needs to be redesigned" (p. 1)

The accumulating effect of this loss of public confidence is increased support for and the implementation of more centralized authoritarian control of the education system by governments (Hargreaves & Fink, 2006). Mulford, Silins & Leithwood (2004) observe that "the external world of the educational leader is one of increasing loss of control…as education systems in many countries have tightened centralized control mechanisms through accountability devices such as high states (*sic*) testing, performance management and competency frameworks" (p. 1). As a result of such centralized control, politicians and their officials who lack educational expertise have been making key decisions regarding education resulting in the displacement of locally initiated innovation (Giles & Hargreaves, 2006). This trend appears to be counter to current evidence-based leadership models focused on team leadership, shared decision-making, and "flattening" the hierarchy (Bennis & Townsend; Kouzes & Posner, 2003; Senge, 1990; Shaker, 2004; Shaker & Grimmett, 2004) leading Giles and Hargreaves (2006) to question whether emergent leadership is sustainable:

> Professional learning communities are postmodern organizational forms struggling to survive in a modernistic, micromanaged, and politicized educational world. Where standardized reform practices continue to tighten their grip, as is now the case in North America, the future for schools as learning organizations and professional learning communities that will develop the creativity and flexibility needed in the new knowledge economy does not look promising. (Giles & Hargreaves, 2006, p. 153)

It may be reasonable to assume that Leavitt (2003) is correct that "hierarchies are here to stay" (p. 102) [and while they] are terribly flawed [and] they inevitably foster authoritarianism and its destructive offspring: distrust, dishonesty, territoriality, toadying, and fear, our ability to work effectively in hierarchies depends in large measure on how we deal with those dangers" (Leavitt, 2003, p. 98). It appears that rather than rail about common government approaches of accountability exercised through centralized control and the flaws of hierarchy that negatively impact the ability to develop schools and school districts, it is necessary to accept current realities and "work hard to reduce their highly noxious byproducts, while making them more habitable for humans and more productive as well" (Leavitt, 2003, p. 102). This can be accomplished if leaders have the complexity to deal with the paradoxes that are inherent in functioning as leaders and administrators in traditional hierarchical structures while employing emergent leadership approaches that facilitate organizational learning. Hooijberg, Hunt and Drodge (1997) contend that leaders with sufficient cognitive, social, and behavioral complexity are better able to lead as transformational leaders and better positioned to facilitate team leadership. They suggest that cognitively complex leaders have the ability to view events from multiple perspectives. Those that are socially complex are able to view themselves as performing multiple roles and of understanding political and affective relationships in organizations. Leaders who are behaviorally complex are able to vary their role behavior depending on the demands of the situation. If there is any hope of being successful in preparing leaders with sufficient cognitive, social, and behavioral complexity (Hooijberg, Hunt, & Drodge, 1997; Kouzes & Posner, 2003) to be the "new theoreticians" (Fullan, 2005), researchers in the field of Educational Administration must be cautious with statements such as "leadership (not leaders) is the key to the new revolution" (Fullan, 2005, xi). Does such a statement suggest that formal leaders are not required? How does one facilitate or create such leadership?

Our previous work that has been focused on developing schools as learning organizations has convinced us that schools, for the most part, continue to operate as traditional bureaucratic organizations that are highly resistant to organizational learning. Often intervention and sustained external pressure and support are required to bring about

change (Sheppard& Brown, 2000c). The case study presented herein reveals how strong school district leadership can go beyond an interventionist or support model to one of fostering organizational learning, not only at the school level, but district wide. Perhaps, our moral purpose, as researchers in Educational Administration, should now be to focus on developing the evidence to strengthen leadership at the district level, rather than a continued focus on "strengthening leadership in schools" (Murphy & Louis, 1999, p. xxiv).

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Figure 1: CEO' Opening Address to GAC

I would like to set the context for today's meeting with the following statement: The district office senior administration want to work with you as members of the district administrative team. I understand that [becoming a learning organization] may be largely the vision of a few at this point. However, if we are to develop this into being a shared vision and to make it happen, we must work together. If this is to work, we must change the model of how we are organized. While we know that we work within a government bureaucracy, we must make it work for us. The only way that meaningful change will happen is if we shift to a decentralized model, meaning more and more of the decisions will be shifted to schools, which also means more and more accountability. Will this begin tomorrow?? No. Change that involves fundamental new ways of thinking and interacting takes years to master. Our personal images of structures and our beliefs surrounding what things are supposed to look like "are not like light switches that can be turned on and off" (Senge, Roberts, Ross, Smith, & Kleiner, 1994, p. 22).

Accustomed to top-down management, district office personnel are largely guided by beliefs and assumptions, that they are responsible for making sure schools are in compliance with administrative mandates. With decentralization, district office personnel have to learn to take on new roles as supporters and enablers of work going on in the schools.... Meanwhile, schools have to learn to take new responsibility for setting their own direction, and moving toward a more collaborative relationship with their colleagues at district office. For both district office personnel and school staff, decentralization means relearning how to do business.

We, like you, have roles and responsibilities that we cannot abdicate. As the model shifts, we must shift as our comfort level shifts. For example, for procedures, policies, and actions for which I will be held directly accountable, or things that I will be forced to defend, I will have to be comfortable. There are certain legal mandates that must be upheld. There are financial obligations that are non-discretionary, and there are collective agreements that must be honoured.

As we shift the model, there will be a period of time it may appear that there is nothing changing, but be assured that change will occur. At the beginning, we will be talking about new ideas. We will experiment with the practice of new applications, and we will design and implement changes in structures. The deeper changes of how we do business will occur over time as we all begin to adopt the new way, as natural. An essential component of organizational learning will be action learning (Stoll & Fink, 1996).

Figure 2: Action Learning Cycle

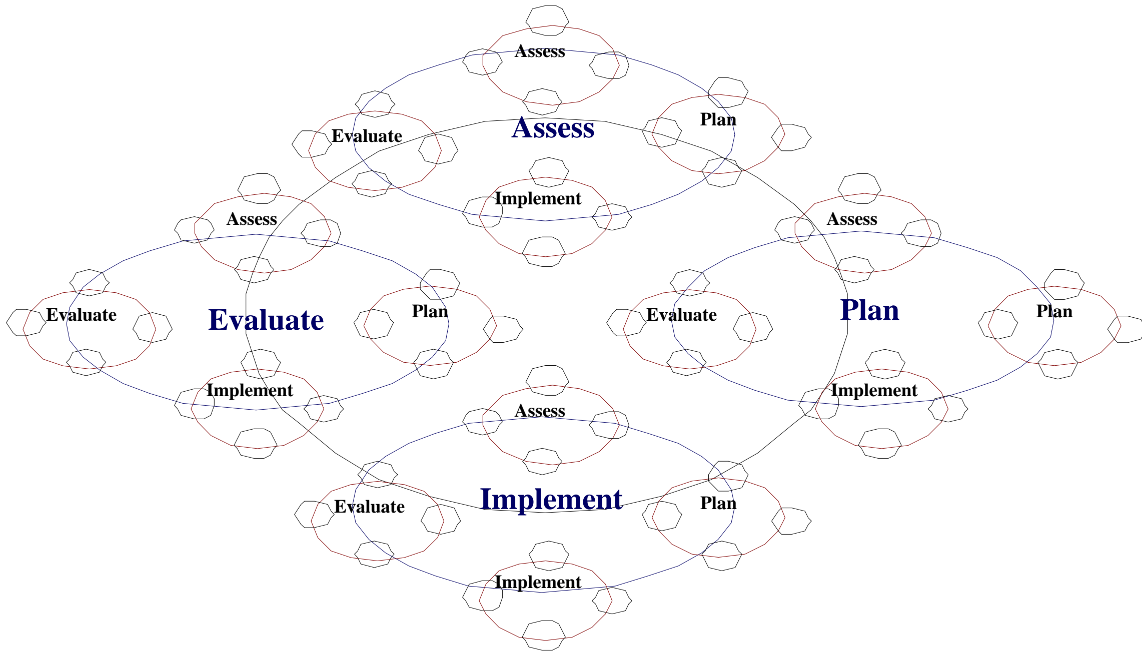

Figure 3: Simple Linear Action Learning Cycle

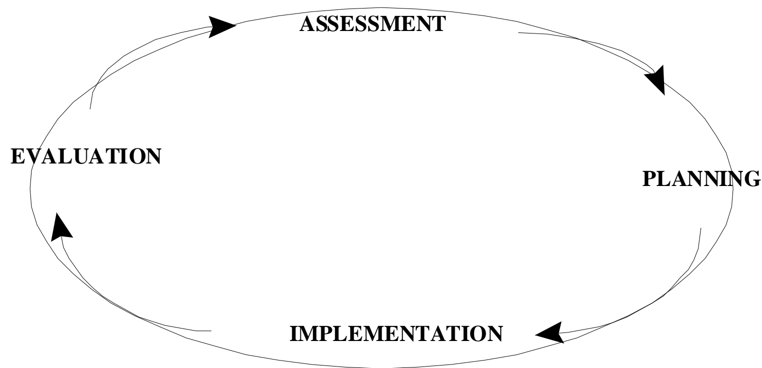

Figure 4: General Administrative Council and Families of Schools

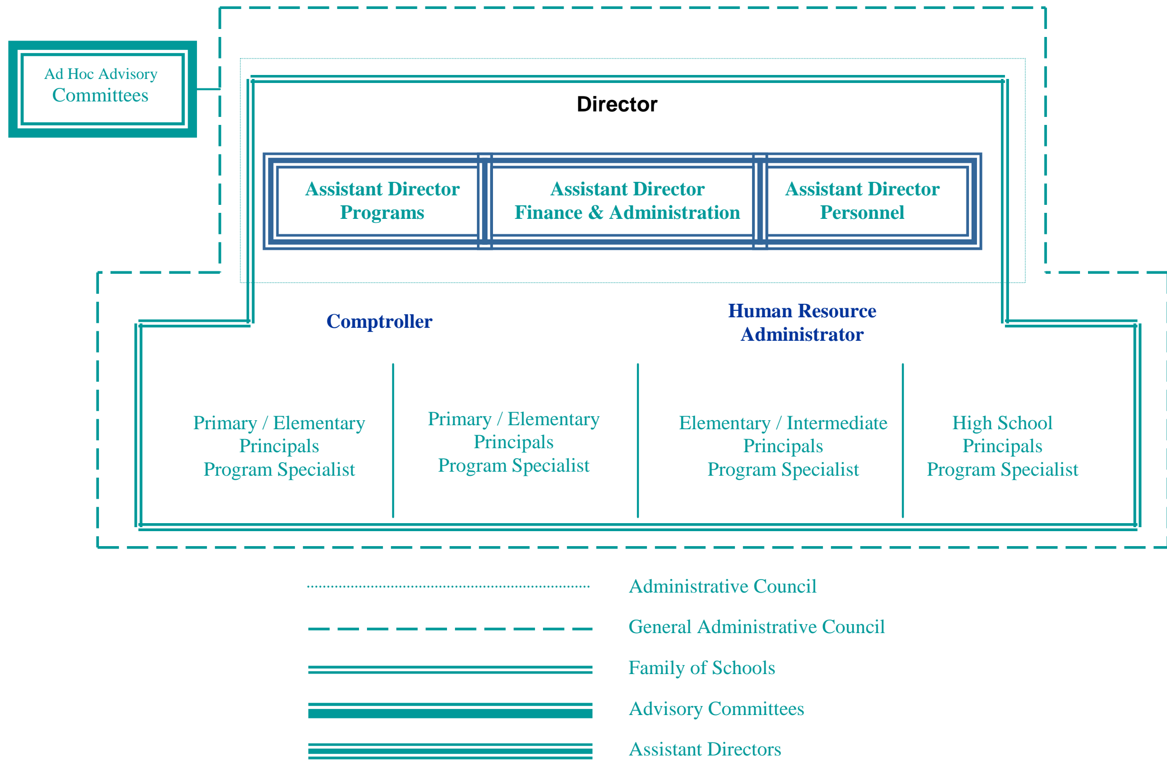

Figure 5: Mirror Image-Plus Framework for Program Specialists

All Program Specialists in the district will assume duties within a Mirror Image-Plus Framework. In the mirror-image role each program specialist has responsibilities that are similar to others. In the mirror-plus role, each program specialist has a specific assigned role that differs from others.

Mirror Image
All program specialists are responsible for school development in a Family of Schools for the assigned level (Primary/Elementary or Intermediate-Senior High). Responsibilities include school development planning, teaching and learning, student assessment, personal & professional growth & development, teacher hiring, school reports, and school councils.

Within the above noted areas of responsibilities, they are expected to engage in decision-making, liaison, consultation, planning and action.

Mirror Plus
Each program specialist has a specific responsibility for the programs and personnel directly associated with the area of specialization (Active, Healthy Living; Literacy, French, etc.) for k-12. As a result of this Mirror Plus role, for example, Program Specialists for Student Support will support and coordinate the work of itinerant teachers; provide training and support to teachers, principals, and other program specialists in Pathways planning, and in the development of Individual Student Support Plans; and monitor the delivery of programming to all students with diagnosed exceptionalities. The Program Specialist for a specific subject area or field of specialization (mathematics, physical education, literacy, visual and performing arts, etc.) will support and coordinate work of teachers of that specialization and will monitor all programming for instruction in that subject area or field, including student course selection, teaching methodologies, accomplishment of curriculum objectives across grade levels, student assessment strategies, and student achievement levels on school, district and provincial tests and examinations.

Figure 6: Decision-making Rights and Powers

Rights		**Powers**
I	Right to be Informed	1. Power to decide and act alone
V	Right to Veto or amend	2. Power to decide and act but must inform
A	Right to Advise	3. Power to decide but subject to veto or amendment before acting
		4. Power to decide but meet and discuss before acting (must have someone with Advise rights, but may or may not have someone with Veto rights).