Leadership in a Flattened Organization:

Conditions for Creating Sustained Collective Efficacy

by

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Land Recognition Statement:

I wish to recognize that my work, and the work of the school board, takes place on traditional Indigenous territories.

I wish to acknowledge and thank all of the survivors, their relations and the Truth and Reconciliation Commission who have called to us through reconciliation to:

- *support vitality and diversity;*
- *create opportunities;*
- *foster well-being and resilience;*
- *support engagement in and sharing of cultural practices, knowledge and learning;*
- *support Indigenous language revitalization; and*
- *create opportunities to carry out the Calls to Action of the Truth and Reconciliation Commission of Canada.*

I wish to express gratitude to Mother Earth and for the resources we are using, and honour all the First Nation, Métis and Inuit people who have been living on the land since time immemorial.

Abstract

This portfolio aims to determine the characteristics or traits that are required to lead system-wide educational change, specifically, a flattening of the traditional hierarchal structure in a school board. Through a review of leadership literature, data gathering through interviews and observations, and sharing in the narrative of a change process, specific leadership competencies emerge as necessary in order to initiate this type of change. I create an implementation guide for achieving an organizational transformation as experienced by a school board, located in northwestern Ontario. Over the course of four years, the board moved toward a different model of leadership, which resulted in an organization with greater transparency and a situation in which staff at every level are empowered and feel that their voice impacts the decision-making processes.

This portfolio documents the journey of this board, and outlines the change processes used to redesign the leadership and decision-making structure within the board. Findings from the initial efficacy assessment provide a baseline context and insights from the data collected in the Year Three Study, validate and describe the shift in the culture of the board. The literature on leadership styles is used to examine the way the board has moved from a hierarchal model of leadership to one where the organization has been "flattened." This results in a practical guide aimed at assisting other districts wishing to make such a shift while also presenting cautions related to this type of work.

Chapter 1: Literature Review

Literature Review Method

In reviewing the literature for this topic, articles were collected from a variety of peer-reviewed journals, using ERIC (via EBSCO Host) as well as Discovery Service for Lakehead University. The keywords used to collect articles included: leadership, servant leadership, distributed leadership, efficacy, elder leadership, leadership and student achievement, and collective efficacy. I explored literature reviews on similar topics and looked through the references to determine if any articles would be suitable reading for the review. To supplement the peer-reviewed reading, I included research from books and online articles from authors that are currently engaged in this topic. While leadership in schools is a well-researched topic, there was little research available on "flipping" the leadership hierarchy, nor was there a great deal of documented leadership studies on use of Indigenous leadership traits/values in the context of school board leadership. Synthesis of a variety of topics as well as an observer's view of the transformation of leadership in the school board, helped to formulate conclusions for this review.

Frames of Leadership

An older study on school leadership and school board improvement was published by Sergiovanni in 1993. In it, he suggests that relying on only 'legitimate' frames can actually work against school improvement (Sergiovanni, 1993, p. 19). He outlines important leadership criteria based on management values such as decisiveness, being a visionary and being able to successfully manipulate events and people so that the vision becomes a reality. It is his opinion

that leadership that counts in the end, taps into people's emotions and appeals to their values, and is very relationship-based. He described a morally-based leadership style that represents a form of stewardship, commitment to serve others and to serve ideals (Sergiovanni, 1993, p. 20). As he describes the decline of traditional frames, or those that are more management based, he talks about the difference between "control over" and "control to" (Sergiovanni, 1993, p. 20). The previous acceptable forms of leadership in schools, according to Sergiovanni, were for a time when the world was less complex and schools and communities were characterized by stability (Sergiovanni, 1993, p. 20). He states that today's leadership "puts people at the centre of things, building a shared sense of what needs to be done and creating adaptive learning organizations" (Sergiovanni, 1993, p. 20).

Through his review of literature in the area of school leadership, as well as through interviews and observations, Sergiovanni says that administrators work to build up the capacities of teachers and others so that direct leadership will no longer be needed and that this is achieved through team building, leadership development, shared decision-making and striving to establish the value of collegiality (Sergiovanni, 1993, p. 21). It is here that Sergiovanni links to the style of Servant Leadership.

He states that servant leadership and stewardship are different from other forms of leadership because they are driven by the system, rather than the individual. He suggests that the act of serving others is, in reality, an act of service to the community and its vision (Sergiovanni, 1993, p. 25). Sergiovanni says that servant leadership brings to practice a different kind of strength; one that is based on moral authority (Sergiovanni, 1993, p. 25).

Need for Change

In 2004, the provincial Ministry of Education established the Literacy and Numeracy Secretariat (LNS), in an effort to raise stagnant and falling standardized testing scores and to help boost student achievement. A variety of supports were put together by the LNS as a response to the needs identified through literacy and numeracy position papers and data collection. Many school boards participated in pilot projects that stemmed from these efforts. For example, Campbell, Fullan and Glaze (2006) identified eight school boards that were part of a pilot looking at effective strategies to raise student achievement in literacy and numeracy. The board under study here was one of the eight schools in this pilot project. The goal was to share best practices, strategies and actions that helped achieve success, and to share these best practices with the other 66 school districts that make up Ontario's public education system.

The goals of the LNS, were to raise test scores. The data showed that there had been a decline in scores and suggested that something needed to be done to support a higher degree of student achievement. Unfortunately, provincial initiatives that took place over the next few years failed to meet the needs of students who were struggling for reasons outside of the content and instruction, and student achievement data continued to decline. The LNS initiatives provided strong support for an improved academic agenda for all publicly funded schools, but omitted support for any non-academic needs of students, that provided a barrier to their learning. It was many of these same barriers that were exhausting teachers and support staff, and did not fit in to the "no excuses" agenda of the LNS. Anecdotal evidence suggests that words such as "unacceptable," "low-tolerance," "excuses" and "low-performing" denigrated many teachers and teacher unions. Although a great deal of money was invested in resources associated with the initiatives of the LNS, very little to no resources were put in place to address those students

struggling with social-emotional, behavioural or other mental health needs. For example, initiatives such as Ontario Focused Intervention Partnership (OFIP) focused on supporting schools with persistent difficulty in improving and sustaining improvement in student achievement, leaving many teachers in the board feeling more incompetent, rather than supported (Pearson Learning Services, 2016).

With a demographic with a high degree of children in care and that have experienced trauma, these supports did little to help the students. Children who have experienced trauma have a need for a safe and welcoming environment and have difficulty with processing information and developing trusting relationships, due to the impact of trauma on the developing brain (Cole et al, 2009). Trauma hinders the development of linguistic and communicative skills as well as the ability to self-regulate and become engaged in learning (Cole et al, 2009). Staff working with these struggling students were left feeling incompetent and frustrated, as none of the initiatives helped to provide much needed services to these students. On the contrary, these initiatives pulled money away from intervention and support, in order to fund literacy and numeracy initiatives.

In April of 2009, the government put further pressure on schools in Ontario by introducing the School Information Finder (Ministry of Education, 2009). This was a search engine tool created to "help principals find and learn from schools similar to their own" and to help parents "learn about all of Ontario's publicly funded schools" (Ministry of Education, 2009). Parents could look at up to three schools at a time to compare school demographics and student achievement scores. This initiative put additional pressure on schools. By looking at a snapshot of student test scores, parents could shop around schools and even select homes in neighbourhoods where there were high-performing schools.

This initiative was not well received by teachers or some parents. In a letter to the Ministry of Education (People for Education, 2009), parent advocate groups called out the government on providing this tool to parents. They noted that a tool such as this was not requested by any of the four provincial parent advocacy groups in the province. There was already a comparison being made between high-performing schools and low-performing schools with the under-performing schools and "Lighthouse Schools" that were part of the *Schools on the Move* program. Add to this the District Review Teams that were developed around the province to comb through classroom practices and school data; this was certainly a time of high-stake pressures. Even though schools within the board were being lauded for areas of growth and highly-supported in areas that required improvement, the culture among staff was a feeling of being undervalued and without a voice.

The current Director of Education began his role in 2013. He felt that it was critical to engage all stakeholders in an external efficacy review of the system to determine if the board was operating as efficiently as it could be, and to determine what the critical next steps would be.

Essentially the board wanted to know if they were, in fact, putting students first with each decision that was being made. An Efficacy Working Group was developed in order to elicit voice from all areas of the geographically vast board. A variety of staff were represented and the Director sought input from the working group before making decisions at the senior administration level. As the review process began, it quickly became clear that there were many challenges facing students and staff. Teachers were working in "silos," many academic performance measures were declining, senior staff seemed disconnected from school administration and school-level staff and that genuine communication was lacking between school administrators and frontline classroom staff (Pearson Learning Services, 2016). Over the

course of two years, morale improved and an overwhelming feeling of trust and value began to develop at the "grassroots level" of the board. The hard work of the Efficacy Working Group has transformed the district to more of a flattened leadership model, but not without its challenges.

One challenge that the board encountered was the resistance of some leaders within the board, who felt a loss of power. There still remains a filtering of voice and messaging in some areas that is an obstacle to the efficacy agenda. There is an increased need, now more than ever, to determine the criteria for strong leadership; be it senior administration, school or central level leadership or even at the classroom level. A flattened organization requires a specific and possibly new skill set of its leaders. The previous "top-down" model of leadership needs to be put aside for a new, more effective model.

Servant Leadership

The idea of Servant Leadership was developed and implemented by many. Robert K. Greenleaf is considered the originator of the servant leadership movement (1970) and is also the founder of the Greenleaf Center for Servant Leadership**.** His premise for servant leadership is as follows:

1. The leader is servant first. It begins with the natural feeling of wanting to serve first.

2. The servant first makes sure that the highest priority needs of others are being met.

3. Success is when those who are served become healthier, freer, more autonomous and wiser and as a result, become servants themselves, and

4. A servant can only become a leader if a leader remains a servant.

(Tran, 2014, p. 264)

This is a shift away from autocratic and hierarchal modes of leadership and more toward a model that is based on teamwork and community and based on ethical and caring behaviour (Greenleaf, 1998, p. 2).

Greenleaf uses the following ten characteristics to describe the servant leaders: listening, empathy, healing, awareness, persuasion, conceptualization, foresight, stewardship, commitment to growing people and building community (Greenleaf, 1998, pp. 5–8). Greenleaf implemented servant leadership to be used as an institutional philosophy or vision, suggesting that the primary purpose of a business is to create a positive impact on its employees and community, rather than solely for profit (Greenleaf, 1998, p. 9).

Is Servant Leadership Transformational or Transactional?

Tran (2014) compares servant leadership to other, more common, styles of leadership. He states that servant, transformational and transactional leadership are often used interchangeably in the literature. Transformational leadership aligns in many ways with the philosophy of servant leadership in that it aims to motivate others to develop their own leadership potential (Riggio, 2009). Transformational leaders also look to meet the individual needs of those in their organizations. Tran (2009) argues that the transformational leader aims to serve the needs of the organization, rather than the needs of the individual. Transactional leadership has many similar characteristics to servant leadership as well, with the exception that the actions of the leader may not always benefit all those working in the organization and that the personal growth of the leader is more prevalent than the growth of those working in an organization, whose growth comes secondary (Tran, 2009).

Others who have studied and written about servant leadership, have some variation in the characteristics that are critical to serve one's organization. In 1999, Laub used a written instrument to collect data about the characteristics of servant leadership and to assess the presence of these characteristics, for the purpose of his doctoral dissertation (Pousa, 2014, p. 213). After extensive review, Laub identified twenty characteristics, grouped under the following six themes: values people, develops people, builds community, displays authenticity, provides leadership and shares leadership (Pousa, 2014, p. 213).

Similarly, in 2002, Russell and Stone completed a review of literature on leadership, with a focus on servant leadership. They proposed nine attributes to describe servant leaders: vision, honesty, integrity, pioneering, empowerment, trust, service and modeling appreciation for others (Pousa, 2014, p. 214).

Carroll and Patterson (2014) proposed that servant leadership was a paradigm shift that evolved from transformational leadership. They stated that transformational leaders try to align their goals with their organization and their "followers" thus serving the organization's objectives, while servant leadership worked to directly serve the goals of the "followers." By building on "Virtue Theory" (theories that emphasize the role of character and virtue in moral philosophy rather than either doing one's duty or acting in order to bring about good consequences), as well as completing a literature review, Patterson and Carroll proposed seven virtues by which a servant leader would be guided by: agápao (love), humility, altruism, vision, trust, empowerment and service. They state that these are sequentially derived virtues and that once you could demonstrate the first, you would move on to the second and so on (Patterson and Carroll, 2014, p.19). Although there is variation of the characteristics that the different bodies of work report, the key themes overlap with that of Greenleaf's original work in the area of servant

leadership, and therefore brings about a general agreement in the literature of a working definition of servant leadership.

Indigenous Elder Leadership

Leadership in the context of a northern Ontario school board must include an Indigenous perspective. There are many correlations to the role of an elder in an Indigenous community with that of a servant leader. According to Stiegelbauer, elders have a job to teach about the vision of life that is contained in traditional First Nations philosophies and handed down through ceremonies and teachings, as well as the importance of being adaptive to the changing world. Elders are viewed as role models that are able to cater learning to the readiness of the individual. They are teachers, role models, advisers, and dispensers of justice, as well as knowledgeable and open. Elders are called upon to help their communities make decisions and advise with their spiritual and cultural leadership (Stiegelbauer, 1996, p. 39). They need to have an ability to use what they have learned in their own experiences, when advising others who come to them looking for guidance. Table 1. 1 compares the Stiegelbauer's overall list of Elder leadership traits defined by Stiegelbauer with Greenleaf's servant leadership traits.

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Table 1.1 Stiegelbauer Elder Leadership Traits vs Greenleaf Servant Leadership Characteristics

Stiegelbauer	Greenleaf
Counselling	Listening
Teaching	Commitment to The Growth of Others
Ceremonies	Conceptualization
Healing	Healing Relationships
Conflict Resolution	Empathy
Group Problem Solving and Counselling	Building Community
Role Modeling	Self-Awareness
Physical Presence	Persuasion
Continuing to Learn	Foresight

Looking at the lists holistically against one another, it is evident that the two styles of leadership have much overlap in traits.

The information provided in Stiegelbauer's research was the result of ongoing conversations with Elders involved with Toronto urban centres. Interpretation was done by Stiegelbauer, but for the most part, he allowed the Elders to speak for themselves (Stiegelbauer, 1996, p. 39).

Claypool, Rowluck & Green explore the concept of Indigenous leadership in an Inuit context (2015). They described the Inuit way of life, the culture and the traditional leadership. Elders play an important role through maintaining the traditional ways of living including enjoying the land, natural foods, and time spent with family. Traditional Inuit "camp leaders" were noted as being reliable, hospitable and fair in their treatment of people. The decision-makers demonstrated wisdom and there was often more than one leader or Elder in the camp. Elders are described as leaders, consultants, teachers, historians, philosophers, professors, and keepers of tradition and heritage (Claypool, Rowluck & Green, 2015, p. 3).

Claypool, Rowluck & Green list eight concepts as values and skills that are taught by the elders: showing respect for others, developing collaborative relationships, promoting

environmental stewardship, developing knowledge and skill acquisition, being resourceful, promoting consensus decision-making and serving others. In turn, these principles were important features when contemplating the unique components of Inuit leadership. Their research points out fundamental features within an Aboriginal style of leadership, including qualities such as service to the community, interaction with the land and promotion of language and culture (Claypool, Rowluck & Green, 2015, p. 3).

Elder leadership is service-oriented, as are other leadership styles, such as servant, transformative and transactional. In an interview with Stiegelbauer (1996), one elder describes the need for putting other's needs above one's own needs in an effort to fulfill a common vision. Another interviewee pointed out that this can cause elders to be overworked. Many participants interviewed by Claypool, Rowluck & Green (2015) believed the concept of traditional leadership was about fostering healthy communities by promoting personal leadership skills, interests or the strengths of individuals. The idea of collectiveness and community was a strong theme in the interviews. Not only did the participants state that the leaders must have leadership skills, but must also promote those skills in others and teach others to do the same. As participants spoke about traditional Inuit leadership, the connection was made to Elder leadership. Interviewees spoke about the calming, peaceful presence of Elders and the social and spiritual role they held in communities.

Elders have traditionally had the responsibilities of disseminating knowledge, teaching language and culture, and developing patience and skills through modeling. When the conversations in the interviews changed to discuss effective school leadership, a leader was described as someone who promoted the collaborative efforts of staff and students and focused on people – the same as in the traditional Inuit leadership. The ability to collaborate and work as

a member of a team was important. The leader must also know their staff and the comfort level with their own ability to lead (Claypool, Rowluck & Green, 2015, p. 10).

Distributed Leadership

The leadership frameworks allowing for leadership to be shared among participants has been lumped onto a form of leadership loosely delineated as "distributed leadership". There are a variety of articles written about an emergence of a distributed leadership model in school systems, claiming a lack of evidence to support that it has any effect on student achievement (Hartley, 2007, p. 202). The appeal of distributed leadership lies in ease with which it can become all things to all people (Spillane, 2006, p. 102). Spillane suggests that distributed leadership offers a way of approaching the very practical problems of school leadership as well as a way of thinking systematically about the practice of leadership (Spillane, 2006, p. 87). Hartley suggests further that there are a variety of ways that leadership can be distributed, but also for a variety of reasons. He says that distributed leadership has been known under the names of shared leadership or delegated leadership, and that this style of leadership has processes that are flexible and decentralized, that co-exist with more rigid constraints.

The first claim in favour of distributed leadership is the "failure of the charismatic hero." Researchers argue that it is not the heroic leader who makes an organization function well. Rather, it is the competence of its members, the prompt use of an initiative, an identification with shared goals based on trust and "unobtrusive co-ordination." The second claim is that there is a greater complexity of tasks that now beset school leaders. Hatley suggests that there is a current "workforce remodeling" taking place, which requires a wider distribution of workload (Hartley, 2007, p. 203).

In contrast to Hartley, Spillane (2005) argues that distributed leadership is not a synonym for shared leadership; nor, he says, are team leadership or democratic leadership. While there are overlaps, each style does not necessarily equate as distributed leadership. He says that distributed leadership is a conceptual or diagnostic tool for thinking about school leadership (Spillane, 2005 p. 143). In his research, Spillane aims to set out his own definition of distributed leadership. He claims that he does not subscribe to the opinion that distributed leadership is the cure of ailing schools. He says that distributed leadership is a recent antidote (or series of antidotes) to the work in the "heroics of leadership" (Spillane, 2005, p. 143). He states that these stories are problematic for two reasons. The first reason is that these leaders do not lead schools to greatness on their own. The second reason is that these leaders tend to focus on the "what" of school leadership, rather than the "how." He states that good leadership practices centres not just on what people do, but also on how and why they do it. Spillane says that leadership practice is first and foremost about leadership *practice*, rather than leaders themselves or their roles, functions, routines and structures. He points out that rather than viewing leadership practice as a product of a leader's knowledge and skill, the distributed leadership perspectives defines it as the interactions between people and their situation. Spillane goes on to state that not only is situation important to leadership practice, but rather that it IS leadership practice (Spillane, 2005, p. 147).

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Table 1.2 Summary of Leadership Styles

Leadership Style	Description
Distributed Leadership	• This style of leadership has processes that are flexible and decentralized, that co-exist with more rigid constraints. Distributed leadership incorporates democratic procedures, but distributed leaders arrive at their positions by appointment and not election (Hartley, 2007).
Elder Leadership	• Elders make decisions and advise with their spiritual and cultural leadership. They have an ability to use what they have learned in their own experiences, when advising others who come to them looking for guidance (Stiegelbauer, 1996, p. 39).
Transactional Leadership	• The actions of the leader may not always benefit all those working in the organization and that the personal growth of the leader is more prevalent than the growth of those working in an organization, whose growth comes secondary. Typically, followers get immediate, tangible rewards for carrying out the leader's orders (Tran, 2009).
Transformative Leadership	• The leader aims to serve the needs of the organization, rather than the needs of the individual and motivate others to develop their own leadership potential (Tran, Riggio, 2009).
Servant Leadership	• A leadership theory based on a deep commitment to a set of values and emerging from a groundswell of moral authority (Giovanni, 1993, 22).

Servant Burnout

In an effort to demonstrate and implement a leadership style within an organization, which centres around serving its people, a leader must take caution not to exhaust one's self in the process. With honourable efforts being made to serve those within an organization, regardless of whether they subscribe to a servant, transformative, distributed, transactional, democratic or otherwise style of leadership, it is easy for a leader to become everything to everyone and burn themselves out in the process.

Grant and Rebele (2017) refer to the "giver" leaders who spend their time connecting others, helping to support and promote others' ideas and motivating them to improve. Givers tend to put the needs of others first but the problem with "givers" is that although they are valuable to organizations, they are at high risk for burnout. When they do not try to protect themselves, they become overwhelmed, lose sight of their own work goals and see the impact of this increased stress at home (Grant and Rebele, 2017). It is often that those people who make the most long-lasting contributions, offer the most direct support, take the most initiative and make the best suggestions protect their time so they can work on their own goals too (Grant and Rebele, 2017). There is a great deal of confusion between generosity and selflessness. Also known as "superhero" burnout, these types of overworked leaders are a sign of a "highly dysfunctional system and a symbol of systemic failure."

Ikemoto, Taliaferro, Fenton and Davis (2014) propose that there are many school systems that require principals to perform practices that are misaligned with system goals and take them away from the core business of the school. They are unable to focus on the leadership tasks that matter and make a difference for success within their buildings (Ikemoto, Taliaferro, Fenton, Davis, 2014, p. 4).

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Servant leaders are also criticized because they only serve their followers and ignore taking the lead, not only leading to exhaustion, but also to an ineffective model of leadership (Kaya, Aydin, Ongun, 2016, p. 1).   There is a distinction that is important to make between doing everything for everyone, and being a servant leader, by Greenleaf's definition. Greenleaf stresses a focus on stewardship, building of the community and the commitment to the growth of people (Greenleaf, 1998, p. 5–8). This does not equate to taking on the responsibilities of others, but rather to removing obstacles in the way of others accomplishing a task, for the betterment of the organization and the people who work within the organization. It is important that if one chooses to adopt a servant leader model (or any other like leadership style) they have a clear understanding of how to properly facilitate that philosophical vision so as not to burn themselves out or lose sight of the need for them to remain the leader in the process.

Characteristics Necessary to Lead in a New Context

Zaccaro, Kemp and Bader (2004) define leader traits as "relatively stable and coherent integrations of personal characteristics that foster a consistent pattern of leadership performance across a variety of group and organizational situations" (p. 121). They list categories of leadership attributes as: cognitive abilities, personality, motivation, social appraisal and interpersonal skills, and leader expertise and tacit knowledge (Zaccaro, Kemp and Bader, 2004). Although all categories have merit, and are important to the success of those they lead and of the organization they lead in, the interpersonal skills stand out as being most critical in this review of literature, particularly of the servant leadership model.

Simon Sinek (2014) says that empathy is one of the most critical traits to hold as a leader as it helps someone want to work hard and complete the most difficult of tasks knowing that the

leader would not ask them to do anything he would not do himself. He suggests that empathy builds relationships and provides a type of fulfilment that money and rewards cannot buy (Sinek, 2014, p. 7). Besides empathy, Sinek suggests that working in a culture where people feel valued and safe to speak openly, and be heard, they are better able to meet the challenges outside of the organization (Sinek, 2014, p. 14).

Utilizing a strength-based approach is critical in an organization, where people will feel valued and valuable (Buckingham, 2005). This would mean that a leader would need to know its employees very well and be aware of their individual strengths, in order to utilize those strengths within an organization. This is another example of where interpersonal skills are very important as a leader. When employees are utilizing their areas of strength, it saves a leader time checking up on their employees, makes people more accountable as there is a stronger sense of ownership over a task, and creates a stronger team, as it creates an interdependency (Buckingham, 2005).

Providing those who work within an organization with a strong voice in decision-making is also an important quality for a leader to have, when trying to implement efficacy within the workplace. Having the opportunity to speak honestly and openly develops "truly human leadership" (Sinek, 2014, p. 150). When people working within an organization are empowered with a voice in decision-making, decisions are better understood and more readily accepted. This does require risk-taking and a strong belief in empowerment over efficiency, but the effort pays off in a heightened sense of collective efficacy (Donohoo, 2017, p. 40).

Conclusions

Removing the traditional, hierarchal structure of an organization, and providing transparency in all decision-making processes, helps to create conditions where people are proud to be a part of a common vision. Simon Sinek says, "Customers will never love a company until the employees love it first" (Sinek, 2014, p. 177). Especially in a school district, that competes for enrolment, or "customers," it is important for the staff to speak highly of their jobs, their schools and their students. When a staff member feels trusted to have a voice and be a part of all decision-making processes, they are much more likely to speak publicly of the pride they have in their organization. Utilizing the strengths of individuals, while still challenging them to develop, is a sign of a servant leader. By making the commitment to grow leaders, an organization will continue its own strong growth, with a strong succession plan. Helping others to see and believe in a common vision strengthens the team and leads to an increased likelihood of success in meeting those goals.

If "flattening" an organization refers to opening lines of communication, shared decision-making processes and increasing voice at the grassroots level of the system, then the characteristics of servant leadership and like styles of leadership appear to be necessary.

To emerge from a time where staff felt disconnected from the senior-level management and from feelings of being micro-managed has been a long journey. Changes that have been made in the way that the School Board operates has helped rebuild and heal that previous culture, in just a short time. One example of those changes includes the increased transparency among members of the Efficacy Working Group and administrators who attend senior administration meetings and school board meetings so they can be a part of and observe the decision-making processes. Other examples include: increased mental health supports for

students and staff, a focus on daily physical activity, "Efficacy" as a standing agenda item on each staff meeting and open lines of communication with the director for all staff in the board. Review of the literature supports the efforts that have been made to develop a new model of leadership in the board, where all levels of the system, feel empowered and trusted to help make decisions.

The school board continues to work at transforming the structure of the leadership model of the board, while promoting the newly-defined description of a leader. By engaging all who work in the organization in the conversation, and by placing efforts in developing upcoming leaders through a board leadership development strategy, the board is likely to continue to see success in creating the optimal conditions for all staff to meet the needs of the students in the board.

Chapter 2: Narrative

Located in beautiful northwestern Ontario, the Board serves 11 communities. Although the board has an enrolment of 5,180 students, the operating area spans over 75,000 square km. There are 17 elementary schools and six secondary schools. There are approximately 730 full-time staff as well and a high number of non-permanent staff that serve the students of the board.

Students from the far north also access our schools. The students are very diverse, as in every other school board. 56 % of the students identify as Indigenous or Metis; the highest percentage in a school board in the province. Just five years ago, that percentage was only 42 %, making it one of three growing school boards in the province. Approximately 15 % of the students live in foster care and many students have been exposed to trauma. The residential school systems have had a high impact on our students, as many of their parents are first, second or third generation of residential school survivors.

The Board began a journey of efficacy in September 2013, with the change in leadership of a new Director for the Board. Over the course of 4 years, the term efficacy was used to describe the concept that all decisions must be analyzed with the result that all decisions must improve student learning. This journey is ongoing, and has created the beginnings of a "flattening" of the organization, providing opportunity for those working at the "grassroots" level to be empowered to help guide the Board in decision-making processes.

Data for this study was obtained through a variety of methods in order to compile this portfolio. Following the initial Pearson Efficacy Review in 2014, I was invited to participate in the observation of this work as a member of the school administrator working group as well as in an observer role with the senior administration and Pearson Learning Services. Over the course of the 2014–15 school year, I participated in the conference calls, check-ins and the initiation of the staff Efficacy Working Group (EWG).

The school board engaged a Learning Service company to provide an efficacy framework. The framework would be a tool that would help guide the system analyse the effectiveness of their strategic plan.

"The Board's purpose in undergoing an efficacy review is to assess, from an external and objective perspective how we are doing in our efforts to put kids first with every decision we make or need to make."

(Director's Blog, June 2, 2014)

Initially, efficacy was defined as the measurable impact on improving someone's life through learning (Pearson Learning Services, 2014). Stakeholders from all areas of the board, in a variety of geographical areas of the board, were included as a part of the process that would provide the board with:

- Clearly defined outcomes and benefits;

- Valid measures of those outcomes and benefits;

- Evidence-based and efficacy-aligned solution design; and

- Delivery and operation of the application with fidelity.

(Pearson Learning Services, 2014)

Once the criteria were developed, a colour rating system was used to rate the key areas. The purpose of developing a rating was to facilitate a discussion about strengths and weaknesses that would lead to action. The efficacy review and the self-assessment workshop in particular both focused on one critical question:

What is the current state of efficacy of the School Board's vision and strategic plan?

And so began the efficacy journey.

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"All stakeholders create a culture of learning so that students come first."

School Board Vision Statement, est. 2014

Greek philosopher Heraclitus states, "The only thing that is constant is change." This has never been more true than now. Eighteen years into the 21st century, knowledge is doubling at an alarming rate. Some suggest the rate of change exceeds the rate with which society can adapt! What are the implications of today's fast-paced, changing world on educators and leaders?

Teachers are preparing elementary and secondary students for a future that we cannot predict. Learners need a new set of skills that go beyond traditional academic skills such as resiliency, grit, empathy, problem-solving, collaboration, creativity and global awareness to adapt and thrive in the future. School leaders need to create school cultures that set high academic expectations while also meeting the non-academic needs of students. Students need to be a part of a system that puts their needs at the centre of decision-making every day. Flipping the organization to adopt a student-centered decision-making paradigm FIRST is what informed the vision statement for the board, when new leadership took the reins in the fall of 2013.

Not long into that first year, the new Director decided to engage in an external review with Pearson Learning Services to determine whether the board was doing what the vision statement stated we were doing. In so doing, the Board's Strategic Plan underwent the same scrutiny. In the areas of the plan where the board felt they were not moving forward, it was hoped this process would identify why those areas were stagnating, and what could be done move those agendas along. More importantly ,and in what would some would describe as unprecedented, the efficacy review would make vulnerable all areas of the board for scrutiny.

The Efficacy Review for us means "Change" and means system "Reforms"; and it will be a huge organizational undertaking that will transcend this current year, and likely into the next few…. I ask you to consider, "What kind of organization do you want to be a part of? What kind of school board do you want us to be?" These are very big and compelling questions indeed, but as

you consider them, please refer to our board vision statement … If we can

agree on this, the rest is sure to fall into place."

(Director's Blog, 2014)

The efficacy review pointed out that in order for the work to take place and ensure that the board was, in fact, "doing what they said they were doing," the leader of the organization would have to have the skill and knowledge, but also the ability to gain the respect, trust and commitment of others at all levels of the system. For the Director to take on such innovative and vulnerable work, he needed to embrace both *expert* and *referent* power stances (French & Raven, 1959). A leader *with expert power* has good judgement and the willingness to share the vision with all those working in the board. Committing to engage in the external efficacy review was a demonstration of the director's expert power. Expert leaders also need to be decisive and confident to build the social capital required to lead the organization through this process.

Starting with a Journey

During the early stages of the efficacy work, the Director exhibited referent power by making it a personal priority to meet and talk face-to-face with staffs in every school across the system. Given the massive geography and distance between schools, this was no small feat. During his fall visits, he explained the board vision and direction and asked people to join him on this journey; giving them opportunity to question, comment and reflect on the goals. Not only was it important for the Director to have a vision; it was equally important that he articulate that vision to others (Northouse, 2012). It was at this time that staff felt they had an open and direct line of communication to the Director and that their voices mattered. It was a responsive and proactive way to move forward the agenda of the board, and offer first-hand rationale for the board's new goals. Many in the organization could now identify with the leader of the system and see themselves in the work. The combination of integrity and honesty that the Director demonstrated through these visits and his regular Director's Blog posts continues to foster a high level of respect from all levels of the system.

During these staff meetings, across the system, the director described, in depth, the motives behind the external review. He strongly felt that school administrators were out of their schools far too often to participate in meetings, professional development or Ministry of Education initiatives. He identified in his Director's Performance Goals to the Chair of the Board and the Trustees that he wished to decrease these absences by 40% in his first year. He committed to making sure that could happen by installing video-conferencing equipment in all schools to facilitate meetings that needed to take place without the extensive travel that was previously necessary. Incidentally, the equipment paid for itself within the first three months with the decreased travel and meeting costs.

The director also cited the reasons that have been previously mentioned: our data did not support the claims of success that were being made, teacher absences were at an all-time high and that senior administration was out of touch with the schools. There was a need to bring coherence to the work that was taking place on behalf of students and we needed to slow down and reduce the number of goals. He also discussed the divide that existed between the business practices of the board and best practices to support students in schools. A quote from the comprehensive Pearson report helped to describe this, "The historical culture has frequently placed a higher value on board office staff and senior administration" (Pearson, 2014).

The staff responses were very similar across the district at these meetings. There was an appreciation for the renewed focus on schools. Staff commented on the increase of media coverage, celebrating the board, saying it helped to foster a renewed level of pride for staff and students. There was a great deal of feedback and suggestions made to the Director in person, and it was evident that these visits provided a connection and a feeling of trust that staff were being listened to.

Teaching staff expressed their sense of relief that there would not be the constant "change of course" with regard to initiatives, and that they could trust that they would have time and support to work at improving student achievement. These meetings also became a venue to express the stress that teachers were feeling, meeting the needs of the students across the system.

Changing Format for Leadership

As the system has gone through the efficacy review process and created next steps for action, it is becoming increasingly clear that there is a need for senior and school-level administrators to become "leaders" instead of "managers." Feedback from stakeholders across the system suggested that there needed to be more creativity and autonomy happening in schools in order for all staff to ensure they were making decisions and planning in a way that would put kids first. It was clear, early on in the efficacy review, that there was a level of discomfort in some areas of the board to think *outside of the box* and utilize the autonomy in a way that was not self-serving to the running of the school or department. Educators, leaders and staff members wondered, could they really challenge the status quo to put the needs of the students at the foreground?

Making the efficacy work a "collective endeavor" certainly created a need for there to be a high level of distributed leadership at all levels of the board, right down to those who worked on the front line with students. Therefore, building leadership capacity at different levels of the board became a priority in an attempt to "flatten" the organization. Ingvarson et al. (2006) state that competent members, quick use of initiatives, an identification with a shared vision based on trust, a collective endeavor and unobtrusive coordination make an organization efficient (Lynch, 2012).

Over the course of the fall and winter of 2014, the Director met with a group of school and central administrators (principals and vice-principals) to begin discussion around the goals identified in the first efficacy report. He soon realized that although it was a valuable way to discuss and problem-solve, that it could not just be at this level that the recommendations within the report were discussed. For efficacy to truly take hold, additional input from front line implementers and staff was needed.

The Efficacy Working Group

Beginning in February of 2015, a Teacher and Staff Efficacy Working Group (EWG) was formed, and this is where the impact of the distributed leadership model became very evident. The Director invited one representative from each school in the board (as well as a representative from the finance department) to form this new group. The group met with the Director monthly, to talk about school and board level strengths and challenges, with regard to achieving the goals of the efficacy recommendations. At the outset of these meetings, it was communicated to the group that there would be no hierarchy at the table. Everyone would be free to speak their mind and understand that no offence or judgement would be made. This was intended to be a teacher and staff group that would be the voices for those in schools and offices. It was suggested that system-level thinking be encouraged and the discussion from these working group meetings would inform and impact system-level decision-making.

During the first few meetings of this group, it was evident that the communication or messaging that had changed at the senior level, was not being communicated down to the frontline staff in schools as it was intended to. It was obvious that there were those who still felt that they should filter the communication and feared that a focus on efficacy was an erosion of their power and decision-making responsibilities. It was obvious that more conversations needed to take place, in order for everyone in the system to understand what a flattened organization was to look like.

There were also conversations at the Efficacy Working Group meetings where the school representatives expressed the need for more staff in the schools. During these types of conversations, the vision statement came under scrutiny once again. Were we looking for more support for the increasing needs of students, or to make up for the short-comings of under-performing staff? While these conversations presented as challenging at times, it was evident that frontline staff needed to express the frustration and "wear and tear" caused by serving a challenging demographic of students. The conversations kept coming back to the need for a culture shift in the board. There were pressures coming from various foci or projects/initiatives in schools, needed to be sorted to bring coherence to the work that was happening in the schools

as well as for school administrators and staff to utilize the new autonomy that was being offered from the senior admin level.

To increase transparency, the Director invited one member of the group attend the monthly Senior Administrator meetings as well as the Board Meetings with the Trustees. This opportunity to attend these meetings not only demystified the decision-making processes that occurred at the meetings, but also offered insight into future leadership opportunities. The Efficacy Working Group has now morphed to currently be one of the most influential working groups within the board, which consults with each of their staffs to help the Director make important decisions that put students first.

Efficacy in Action

There were many examples of the influence that the EWG had within the board. Discussions around Professional Learning Communities (PLCs) took up a great deal of the agenda of the first few months of the Efficacy Working Group meetings. A professional learning community refers to a group of educators that meet to shares best practices and work collaboratively to improve teaching skills and the academic achievement of students. At the time when the group first assembled, there was a structure in place for PLCs that brought two "traveling" supply teachers into schools to relieve a teacher to meet with another (specified) teacher to work on collaborative inquiry, to further student achievement.

There were various issues identified by the EWG, on behalf of the teachers in their schools. The first of these was that the teachers were not necessarily the ones selecting or guiding the inquiry, but rather it was assigned by an administrator. Members of the (EWG) expressed frustration with only being able to collaborate with the teacher who had release time at the same time as them, although their topics of inquiry may have been different. There were a variety of experiences in each of the schools but the consensus remained that this current framework was not working. Therefore, through the discussions of the EWG and each of their school or office staff they represented that a change was initiated by senior admin for the 2015-2016 school year, which would allow more authentic, more teacher-led professional learning communities to take place.

Other major decisions took place after consultation and input from the Efficacy Working Group. Another example of decision-making impact of the EWG regards which platform the board decided to pilot for assessment, reporting and student data tracking. This is an example of a decision that would previously have been made by senior administration and presented to staff in their schools. By welcoming the input of those who would be using the software, the board was able to gain the support of those who would use it, making implementation less stressful for all.

There were many business decisions that were impacted by the voices of staff and students. Creating bussing schedules that worked to positively impact students, changes to the Human Resources structure and including representatives from the Efficacy Working Group and the school administrator group in a Superintendent interview process were all examples of how the Board moved towards being a flattened organizational structure, moving away from the hierarchy that previously existed.

The Efficacy review evaluated four areas: Outcomes, Evidence, Planning and Implementation and Capacity to Deliver. The June 2016 Efficacy "Report Card" showed growth in three out of the four areas: Outcomes, Evidence and Capacity to Deliver. The new data stated that the "Outcomes" category suggested that stakeholders had improved clarity of the intended outcomes of the "Kids Comes First" board plan, and more confidence in the design and value of the plan. In the "Capacity to Deliver" category, the data stated that this area was perceived as a strength across all stakeholder groups. Stakeholders expressed pride at the progress that had been made regarding traditional student achievement, motivation and engagement and felt it would be a missed opportunity, as a next step, not to pause to celebrate and share accomplishments system-wide.

The area that remained a focus for improvement was Planning and Implementation. This report suggested that the lack of movement in this area is a result of the absence of consistency and clarity around roles, responsibilities and governance in some key areas, particularly at the school level. The report suggested that recalibrating as a system around the pre-requisite characteristics of VP/Ps resembling servant leadership was warranted.

The Director stated at this time that while there was growth in many areas, he looked at the areas where the colour indicators had remained the same and questioned, "Why are we not moving?" Many of the areas that had been identified as highly problematic were not a surprise.

The Director expressed that he was tired of hearing that people could not do the things that needed to be done. The board needed something to focus their discussions and efforts toward improvement, and that became the board vision statement. It was at this time that the Board agreed to continue its on-going partnership with the company doing the Efficacy review. They would continue the goal-setting and external check-ins, as there was growth happening with the goal of creating a flattened organization. As well, the company provided check-ins and criteria that would be an additional form of accountability.

The work of the Efficacy Working Group continued through another school year. In March of 2015, a group of school administrators was brought together to join in an Efficacy Review visit with the Learning Services company. The intention was that, following this visit, the school administrators would then join the Efficacy Working Group that was already in progress. The goal was to bring greater coherence with the efficacy agenda to all levels of the system.

The Efficacy company's team held meetings over three days; the first day with the Senior Administration, the second day with the new school administrators group and the third with the Efficacy Working Group. The company had come equipped with ten recommendations that they wanted feedback on from each of the stakeholder groups. It was during the third day that the company realized that they may have missed the mark with the recommendations.

A Transformative Moment

The meeting with the Efficacy Working Group on the third day of that week was a transformative moment for the board. It was during the first prompt, which recommended a need for whole child measures for the students of the board, that many of the group members became very emotional, expressing their concerns for the needs of the students in their classrooms and schools, and their inability to meet those needs on their own.

Group members spoke openly about how stressed they felt, some identifying that they had taken leaves of absences in order to deal with their own mental health that was affected through the vicarious trauma experienced in their day-to-day work. The conversation quickly shifted to the need for triage, or a way to know what community supports would be available for students and their families. There was a need for a continuum of mental wellness (a range of indicators of mental wellness) that would indicate what external resources schools could call on for help with particular student needs.

Many school representatives expressed their frustration with existing agency supports that students were unable to access the supports that they so desperately needed. These supports included services such as speech and language supports, occupational therapy, counseling, medical doctor visits, child and family service protection and prevention as well as having their basic needs to be met by their families and caregivers.

During this discussion, we realized that the families of our students were looking to the schools for everything: health care, social services and therapeutic services. While the Board had many of its own supports in place, it just was not enough to support the increasing needs in schools. The group continued to talk at length about the vicarious trauma suffered and their inability to practice self-care. One teacher said during that meeting, "How can we put kids first when we are just so tired?"

At this same time, the board was engaging in forming partnerships with Nishnawbe Aski Nation and Keewaytinook Okimakanak Board of Education. This had been communicated to the Efficacy Working Group, and while there was much excitement with these groundbreaking partnerships, staff feared that there would be an even greater increase in the needs of students - a need they already felt they were not meeting.

What was different at this meeting, was that there was not just the communication of a need, but a valiant effort, to problem solve as a collective and to look for solutions together. The EWG spent the remainder of the day focused on this topic, while Learning Services and the Director listened and determined the next steps that would need to take place.

LEADERSHIP IN A FLATTENED ORGANIZATION

Seeking Community Support

Over the next few months, a great deal of work was done by the senior administration, to advocate and lobby to garner support for the needs identified in that meeting. It did not come as a surprise that the board had students with non-academic needs that were preventing them from having academic success, but the strong need to support the staff working front-line with the students became very apparent.

After many opportunities to speak with the Ministry of Education and even the Premier of the province, senior administrators were permitted to submit a proposal for wrap-around services to help support the high degree of student needs in the board. The Director also prepared to offer staff an incentive for the following school year, to make their own self-care a priority. Beginning in the 2015-2016 school year, staff could make the commitment, by signing an online pledge, to participate in 30 minutes per day of daily physical activity, and then receive a lieu day in return, to be used at their discretion. This sent a message to staff that they were valued, trusted and that their own needs were important to those they worked for. The response was incredible, as nearly 90 % of staff participated in the pledge and accessed what would be coined as a "DPA Day" (Daily Physical Activity).

The Final External Report

That June, when Learning Services returned with their final report, they made note of many of the accomplishments that had taken place over the course of the year, and offered a new set of recommendations to guide the board's next steps. Noteworthy at this time, was the fact that although the teacher federations were participating in "work to rule" job action, the federation presidents acknowledged the value of efficacy and grassroots level voice in the board, and permitted members to continue participating in the Efficacy Working Group meetings and data collection opportunities. The overall rating, based on the same criteria as the first report from Pearson, was changed from an amber-red to an amber-green. The following items were noted:

- Stakeholders had improved clarity of the overall outcomes of the "Kids Come First" board plan, and more confidence in the design and value of the plan.

- Stakeholders expressed pride at the progress that had been made regarding traditional student achievement, motivation and engagement and felt that it was a missed opportunity not to pause and celebrate accomplishments system-wide.

- There was more work to be done on identifying the "whole student" criteria and how to measure the success of efforts to support the academic and non-academic needs of students in the system.

- That "staying the course" with regards to initiatives within the board was widely appreciated, and staff were able to go deeper with their learning as a result.

- Leadership needed to be equally strong at all levels of the board.

Over the course of 2016, new representatives were added to the Efficacy Working Group; a representative from the Information Technology department, one from Human Resources and a custodian. As some staff had changed schools, there was a need for new representatives to join from schools that had vacancies.

Internal Review

In October of 2016, a final review was planned to look at the growth over the course of the previous three years and to guide future steps, based on the feedback that would be collected through interviews across the system. Interviews were conducted in-person and by phone using four guiding questions:

- How has the efficacy work responded to the needs of the system?

- Do you see a change? If so, what changes have you seen in particular?

- This is in the context of putting kids first. Do you feel that the board is responding to your needs?

- What else can the board do to help you to put kids first in your role?

By conducting these face-to-face interviews with staff in different roles across the system, it was intended that there would be an ability to document the perceived "change" that had occurred throughout the board's efficacy journey.

LEADERSHIP IN A FLATTENED ORGANIZATION

The findings of the qualitative research study that took place October 25 to November 4, 2016 came in the form of a report. Building on the efficacy work that began in June 2014, it was an appropriate time to gather feedback from frontline staff regarding the impact that the board's efficacy work had on achieving the district's goal of *putting kids first*.

In mid-October, an email was sent to school principals requesting that they invite staff to elicit feedback on four stated research questions. These questions would serve as the focus for the Learning Services Efficacy's team upcoming district meetings. Business and support staff in the board offices were also encouraged to participate. This sampling strategy resulted in a fairly representative research population with varying levels of awareness and involvement in efficacy work to date. Interview transcriptions were disaggregated by question and a qualitative coding exercise revealed 16 recurring sub-themes that were categorized as *positive* or *constructive*. Once grouped in this way, similarities between the themes became apparent, thereby pointing to six overarching themes.

In terms of the positive feedback provided, school and board personnel stated that they had noticed a shift toward more student-centric conversations and decision making. Gains have been made to keep administrators and teachers in their schools instead of attending off-site professional learning. Stakeholders indicated that the senior team is actively engaged in *flattening the organization,* which has resulted in a notable increase in teacher voice, and there is an increased focus on teacher wellbeing.

Respondents described how challenging it is to address the wide range of social, emotional, physical, and learning needs of the students. Data suggested that there had been a shift in focus from purely student *academic* success toward ensuring that students are engaged and that their basic and socio-emotional needs were being met. To this end, participants stated that they were encouraged by the cross-sector collaborations under development with local community partners and provincially with the Ministries of Education, Health, and Child and Youth Services.

To maintain momentum, participants also provided constructive feedback. There is widespread acknowledgement that *flattened organizations* require a review of traditional decision-making processes. There is a perceived need for clearly defined roles for all stakeholders regarding their relative responsibilities vis-à-vis the efficacy work in a flattened organization. This will help to clarify issues that need to be elevated to the attention of the

Efficacy Working Group, versus issues that can be dealt with at the school level. To address this concern, the team recommended developing Efficacy Working Group norms and/or protocols.

Next, while stakeholders reported that some resources and training had become available to help engage and support at-risk students, more was still needed at the school and classroom level to prevent these vulnerable learners from falling further behind, and to help reduce staff stress. Stakeholders recommended that the district monitor and assess existing resources and initiatives (e.g., trauma training, Hockey Skills Canada program, Aboriginal graduation coach) to gauge impact on both at-risk and non-at-risk learners. Effective models for implementation should then be shared between schools. Additionally, the board was advised to conduct a gap analysis to identify what additional supports were required to further increase student engagement, well-being, and success.

Findings

The following quotations taken from the research are representative of the kinds of responses the research generated.

How has the efficacy work responded to the needs of the system?

"I feel that there is a new level of awareness at the senior level in regards to academic, social, emotional - the whole gamut. There is a new level of awareness in regard to board as a whole. Communication has improved. We have been told several times during past years is that senior admin is just an email away and that is different messaging then we've had in the past."

"...creating the efficacy working group to give all of us voice. I find that phenomenal…and our efficacy group doesn't include just teachers. It involves everyone. This is putting kids first."

"From my perspective I see more investments being put towards kids.

"I feel like I can go to any of the senior admin team and have straightforward conversations."

"I have seen a shift from teacher centered way of doing business to a student centered way of doing business. I think that the vision helps with that-goes back to the vision of putting students first."

Do you see a change? If so, what changes have you seen in particular?

"I see a lot of changes. People feel more involved than before. Decisions are being made that unify the system in the best interest of students and putting kids first."

"I think there is still room to grow but we have a start and who would've thought we would be here three years ago?"

"Decision making process is more timely/effective as a result of the efficacy meetings. Having visibility to the succession planning is a new change for the board."

"I see more voice in the system. Everybody feels like they can give a suggestion."

"I fear that sometimes people are going instantly to the top to solve problems when it could be handled at the school level."

This is in the context of putting kids first. Do you feel that the board is responding to your needs?

"The physical activity challenge has responded to my needs. I've been teaching for many years now and this is something that has never been done. This is a response to staff feeling mental health strain."

"Members of the efficacy working group, as well as school administrators attend board meetings and senior administration meetings on a rotating basis. Having that lens of what is going on behind the scenes demonstrates to us that there is a high level of thought being put into every decision being made to ensure that students do come first."

"I feel that we've come a long way and I feel proud again to be working for our board."

"I feel that I have been now taken seriously as a professional. I feel that I am being acknowledged and trusted as a professional."

"We still need to come together and collaborate as a community, including our agencies to meet children's needs."

"We feel supported during times of tragedy."

What else can the board do to help you first in your role to put kids?

"*There needs to be an early intervention strategy with every single stakeholder to help create a plan to meet the needs of kids."*

"I think we have a good start and continuing down the same path and continuing to advocate for students and that every child can learn and children come first."

"I look forward to seeing what comes next. There are exciting things coming down the board and I'm happy to be a part of it and watch what is happening with our kids."

"We need to find ways that we can share effective practice across schools and panels so we can build on what we know works."

"We could focus on including all areas of the board offices in efficacy conversations."

"Stay the course."

While it was evident that positive change had been made, stakeholders acknowledged that challenges still exist and there is more work to do. There is also shared awareness that relief and support will take time, an awareness matched by an overwhelming sense of hope that additional supports are on the way. To continue this positive momentum, engage with a wider

group of stakeholders, and truly scale efficacy across the organization, the board was provided

with recommendations for moving forward.

Chapter 3: Analysis, Recommendations and Next Steps

This section of the portfolio is based on my experiences as an observer, participant and researcher with regard to the efficacy work of the School Board. I have been a part of the work firsthand, since the release of the first Efficacy Report in 2014. The following analysis, recommendations and cautions are based on my observations and participation in this process. These recommendations come as a result of the experience as summarized in the Narrative portion of this portfolio as well as in reflecting on the implications of the literature and an analysis of my findings there.

In the fall of 2013, I had volunteered to be on the administrators' efficacy working group that was formed, following the release of the first report. At this time, I began collecting anecdotal observations, reflections and data from the meetings that would follow, both with Learning Services, and with staff of the board. In 2014, when the Efficacy Working Group was formed, with representation from every school and office in the board, I was permitted to take on the documentation of the transformation of the board for the purpose of my masters' research. I recorded minutes at all EWG meetings and was later invited to be a participant when school administrators were asked to join the working group. I was also invited to be an observer during several senior administration meetings with Learning Services.

Analysis

Looking through the data collected in the 2016 interviews with a cross-section of staff in the board, it is evident that there are traits and characteristics that are required by the system, in order to be a leader with this board. Almost twenty years ago, Sergiovanni spoke to the need for school administration to be rethought entirely, with a stronger focus on the "minister" portion of the word (Sergiovanni, 1993, p. 20). The data collected through the Efficacy Working Group (Table 1.3), shows that many of the characteristics would support his argument. Leading by example, visibility, being a good listener and removing barriers to help others grow are examples of the expectations of today's staff with regards to the leadership needed to meet the needs of the

students. Sergiovanni also describes it as needing to be a "leader of leaders" and building up the

leadership capacity of others (Sergiovanni, 1993, p. 21). This is echoed in the literature where

Tran (2014) states that transformational leadership (often used interchangeably in the literature

with servant and transactional leadership) aligns in many ways with the philosophy of servant

leadership in that it aims to motivate others to develop their own leadership potential (Riggio,

2009).

During the October 2016 Pearson Efficacy Review with the board, those interviewed highlighted

the following traits as critical:

Table 1.3 Leadership Traits from School Board Staff (Pearson Efficacy Review Process, June

2016)

Emotional Intelligence	Transparency	Communication
Open to other perspectives	Seeing the big picture	Believes in board's vision
Lead by example. Do not ask something of others which you are not prepared to do yourself	Ensuring people feel they are being heard	Approachable and visible
Bravery, humility, kindness (Grandfather teachings)	Realistic idea of what happens in classrooms and of the growing demands of staff	High visibility and sense of community (inside and outside schools, between communities)
Fair	Open to hearing ideas from front lines and continuing the work on efficacy	Strong relationship builder, encouraging multiple voices/perspectives
Proactive and forward-thinking	Understanding that not all roles are the same; important to understand local context	Recognizing and valuing strengths in other people

Confident	Active listener but also open to dialogue	Committed to advocating for the needs of children living in Northwestern Ontario
Empathetic	Compassion	Strategic

Reflecting back, the development of the Efficacy Working Group was not without its challenges. At the first meeting of the Teacher and Staff Efficacy Working Group, it was evident that some representatives came to the table with their own agenda. It was not clear at first, if they were what Northouse (2012) describes as "out-group" members (those who do not belong to a specific in-group, in this case a system leader) or if they did not have a clear picture of what efficacy truly is all about. It took effort and some difficult conversations between the Director and those that appeared to have come with a personal agenda, rather than looking through the lens of "Kids Come First," to ensure that the group was cohesive in working toward a common goal.

A second challenge became evident with some school-level administrators who felt that efficacy (and therefore the work of this group) was, as one administrator said during the 2014 school year, a "further erosion of his authority as a school leader." The "flattening" of the organization was interpreted as a "crushing of the leadership" in some contexts.

In short, it separated those who embraced efficacy and a distributed leadership model from those who did not. Kellerman (2012) explains that current leadership literature points less to "controlling and commanding" and more to "co-operating and collaborating." She refers to Daniel Goleman's theory that leaders should now be "true collaborators" and "team members, rather than top-down leaders" (2002).

The definition of "efficacy" itself, as used by the board, changed through the review process. The initial definition, supplied by the Learning Service, was "the measurable impact on improving someone's life through learning" (Pearson, 2014). As the work continued, this definition went through a transformation of its own. The Director referred to efficacy as, "representing getting better as an organization, bringing scrutiny to those areas that seem stubborn to budge or consider changing and ultimately to make the Board the best public education opportunity for all kids and staff," (Director's Blog, September 28, 2014). By

February of 2015, the term used at the introductory Efficacy Working Group meeting was, "advocacy." When the Terms of Reference was created by the Efficacy Working Group in 2016, the term "efficacy" was defined as, "the concept that all decisions must be analyzed with the result that all decisions must improve student learning," (Efficacy Working Group, 2017).

My own observation is that the definition became less about the meaning of what efficacy was, and more about the changing nature of the leadership of the board. It was about taking a former hierarchal structure and pressing every level to be parallel with one another. Changing the definition itself required a leadership style that could accept broad input and, in this case with regard to an original statement of intention to one that better described the direction in which the board needed to focus. There was a need for the board's most senior leadership to be open-minded, flexible and listen to what others were saying.

Ultimately, the Director and the Senior Administration would continue to have to make decisions and be responsible for initiating changes. There still needed to be someone that was decisive, nimble and attentive to the board's needs as they arose. Although the goal was to flatten the hierarchal structure, those at the senior level were still accountable to the rest of the system. The difference now is that there are opportunities for those working frontline, often the same people who are impacted by change the most, to now have a voice. This was not possible or even reasonable prior to the formation of the EWG. Having the opportunity to hear a cross-section of voices, who represented other staff throughout the district, gave the Director a chance to pay attention to needs as they arose. This did not mean that there would always be consensus, but it offered senior administration (and school administration, in the case of school level leadership) a chance to make informed decisions based on the input from across the system. Decision-making was now happening from the ground-up, rather than from the top-down, all in the service of putting the needs of students first.

Technology is helping to change the conversations between leaders and "the led" (Kellerman, 2012). Email and blogs are increasingly accessible to the system leader, the Director and other senior-level administrators providing another tool to assist in "flattening" the organization. No longer are there only one-way conversations occurring from the Director to the staff of the board; two-way conversations facilitated mainly through email are becoming the norm. This helps to increase the visibility of the Director with his or her staff and increases her

ability to receive feedback from staff. This adds one more way for staff to feel valued and heard and reflects characteristics of the servant leader (Greenleaf, 1970) who values community and leads in response to the needs of his or her followers. This challenges some common "leader-centric models," and offers the possibility that people without any title or formal authority, can have as much of an impact as those with titles (Kellerman, 2012).

Servant leadership was not completely foreign to Board. At the time the new Director began his role, the development of servant leadership was well underway in the board. The previous Director believed strongly in this style of leadership and this was no different when the new Director came in 2013. A servant leader shifts the focus from his or her own interests to those of the people she serves (Lynch, 2012). Senior-level, school and central administration were to focus on the means to achieving the results and not on the results themselves. Simply put, administrators were challenged to remove the barriers to the work that their staff needed to do in order to put kids first. It required them to have integrity, trust, respect, vision and influence on those with whom they worked (Lynch, 2012). It required a sacrifice on the part of the leader, and allows more autonomy among those who they led. In an essay by Robert Greenleaf (1970), who first coined the term servant leadership, he explained:

> A servant-leader focuses primarily on the growth and well-being of people and the communities to which they belong. While traditional leadership generally involves the accumulation and exercise of power by one at the "top of the pyramid," servant leadership is different. The servant-leader shares power, puts the needs of others first and helps people develop and perform as highly as possible.

(Greenleaf, 1970)

Everyone needed to understand that if the Board claimed to be a board that was putting kids first in every decision, then it needed to ensure that it was doing just that. Action items came from the first review, and then the board had the obligation to follow up. In a 2017 interview the Director he stated that it was necessary for many difficult conversations to take place, and he found that the "higher up on the food chain" you went - i.e. the more senior the leadership under the Director - the more resistance to change there was. The need to flatten the

organizational structure was more apparent than ever. The changes that have been made to date have put the board in a good place, but he continues to believe that some necessary changes are still not happening fast enough.

The Director became frustrated at the rate of, and the resistance toward, change. Much discussion occurred about why change was not happening fast enough and whether all team players were prepared to walk the talk. He felt that layer-by-layer and department by department, all staff of the board needed to ensure that they put kids first. He identified that this was unarguably the direction of the board. He says that if he ever dreamed of an organization that understood what it means to put kids first, then the board was demonstrating that now.

This change process was exhaustive, costly, confrontational and was sometimes divisive. Despite the frustration felt by the Director, and the slow pace of change perceived by some, people are proud to be working for the board and are working tirelessly. It leaves questions such as, "Are we equipped to do the work? Are the needs of the students too great for what we need to do? How can we do the right thing and not become overwhelmed?"

By listening to the voice of the system and engaging many in the decision-making process, more work is created and more needs are uncovered. With more discovery through this lens of efficacy, comes more accountability, and more problem-solving to do. The board continues to keep moving forward. The "flattening" has begun. There is currently a new level of transparency that was not present before within the Board, and likely in not in any other boards. The pressure is being felt by everyone.

With more knowledge about the needs of the whole child, comes a feeling of urgency to figure out how to support those needs. Teachers are feeling empowered, but at the same time exhausted. It is hard work, but so worthwhile. Looking forward, the board has begun to refine some of the goals to include a more precise governance structure and look for ways to develop leadership skills at all levels. It is evident that the Director's vision for the board has the support of many to move forward, but it will take time and as he says, "requires everyone's best."

The efficacy process began conversations at all levels of the board that have stimulated an action plan for needs that might never have been discussed without the forum of the Efficacy Working Group. This has required a response from the board, and some challenges that have

arisen through efficacy discussions are not as easy to resolve as others. In some ways, these conversations have placed the Board ahead of other school boards, particularly in the areas of identifying needs for student and staff mental health as well as with more effective ways to improve attendance and graduation rates.

Eyes around the province are watching, as the board works through this transformation. The students of the board are diverse; some with incredible strengths and also some powerful challenges. It can feel overwhelming at times but also very gratifying. As a leader who provides "out-group members" a voice, the Director of Education has allowed them to become more involved, work more independently and hold responsibility for their actions. Although this can be a challenge of leadership to allow this type of empowerment, it can also offer the most benefits within the system (Northouse, 2012). While the "grassroots" level of the board may not be an "out-group" in the true form of the definition, front line staff have felt minimal impact in decision making processes of the past.

There has never been a feeling of empowerment within the board as there is right now. While not everyone would agree, the data collected in the final Learning Services report indicates an overall improvement in morale and involvement. There may be more at stake to address the challenges that have been brought forward, but it is the hope of Monteith, that investing time and efforts at problem solving will transform the board into a place where students are the ultimate victors.

Implementing Change

The following recommendations for the framework to follow are based on the steps set out in the Efficacy Framework (Pearson, 2013). It is very useful to have an external body to engage the school board in our changes to enhance efficacy, as it allowed for an unbiased and external view of the initial review and the progress along the way, and it brings in a new voice, one that is not allied to any particular existing way of doing things within the school district - just to the success of the board, in implementing change. Learning Services also brought with them an 'Efficacy Framework,' and suggestions for initial steps in working toward increased efficacy, that served as the starting point for our board's restructuring.

LEADERSHIP IN A FLATTENED ORGANIZATION

Starting a review in a district school board requires determining a comprehensive list of evidence to place under scrutiny and to source data about the current (initial) state of the board. Included in the data to review would be the following: stakeholder interviews, performance goals of the Director of Education, board strategic plan, Board Improvement Plan, the vision statement, provincial achievement data, demographic data, structure of academic intervention as well as policies and procedures of the board. There should be a range of methods for collective evidence during various stages of the process. When looking at the data, utilizing a rating system that makes sense and is easily communicated and tracked by all stakeholders is important as well. The evidence should be of recent and of high quality. It must be unbiased, representative of the work of the board and span over the time of the review process. The evidence is analyzed and then informs the next steps.

For the planning and implementation stage, achieving your intended outcomes takes dedicated work and careful planning. The Efficacy Framework prompts an organization to think about the plans, governance and systems that are in place in order to deliver the intended outcomes. An action plan must identify milestones, actions, responsibilities and timelines. There must be regular updates to the plan and those changes must be communicated clearly to all stakeholders. When monitoring the progress and preparing to report, updates to the plan must be based on progress and the plan must be adapted to reflect the updates. Feedback from stakeholders and leadership is critical and there must be a clear method to monitor the progress being made.

In order to meet the goals set out in the onset of the review, everyone involved needs to have capabilities, relationships and support to drive the work. Other considerations must include the capacity of the system to deliver, the culture of those working in the system, budget, skill sets, leaders that support the work and opportunities for all stakeholders to collaborate. Relationships are critical in every step of the process. Stakeholders must identify their concerns and needs to regular communication and a positive partnership.
(Pearson Efficacy Framework, 2013).

Recommendations and Cautions

For those wishing to take on a similar process in their school board, I would give the following advice, based on our experiences and on my own reflections:

- Understand that this process identifies areas of weakness or areas that require discussion and possibly change.

- Involve a cross-section of all members of the organization. Leaving out any employee group, students, parents, trustees or other stakeholder group does not give a full or accurate picture of the perceptions of the current state of the board.

- Transparency is key. Looking for ways to increase transparency to all who are a part of an organization improves the culture and builds morale, which ultimately positively impacts students.

- Lateral communication provides staff with a sense of value, trust and ownership in all the work of the board. Providing opportunities for staff at all levels to communicate with school and senior administration is critical in creating a flattened organizational structure.

- There must be a willingness to change. An organization should not embark on this type of work if they do not plan to act on the recommendations. This only creates frustration and lowers morale. There must be an acceptance of responsibility and an obligation to act.

- Everything should be on the table for change. The Board even reopened its Strategic Plan prior to the expiry, in order to better align the goals with the recommendations of the efficacy review.

- Walk the walk. If an organization is going to tip the hierarchy, this must include all areas of the organization, business practices included. Old procedures must be replaced with new ones that aim to meet the needs of the current students.

- The visibility of senior administration must increase in all areas of the system. There cannot be a disconnect from senior level administrators from the work and needs of a school.

- Understand that those who partner and support a system going through a transformative process will also be challenged, and expectations will be raised of what they need to do to support students and staff in schools.

- Autonomy will be greeted with mixed reactions. It needs to be coached and supported and the permission to fail through risk-taking must be permitted. Some will prefer to be told explicitly what to do and, for that reason, autonomy will be uncomfortable. Others will need reigning in to ensure that autonomy still leads to meeting a common goal.

- Various methods of communication help to make everyone feel informed. While some staff will prefer in-person opportunities to speak and ask questions, others will feel more comfortable with electronic communication and surveys. There needs to be a variety of ways to collect input and voice from all levels of the organization and all stakeholders, including students.

- Data should "lead the need." Equal support for all areas of an organization is not always the best method of utilizing resources. However, the communication of why and where resources are allocated is critical to building system understanding.

- No level of leadership in the organization can be left feeling that their voice does not matter. It creates a divide among staff and creates dissent in the ranks of the organization. This does not mean that everyone will agree, but rather that everyone has an opportunity to be heard.

- There must be time built into the process for reflection and review. It can start to feel like the "to do" list grows exponentially and that the increase in voice at various levels of the system creates a sense of never-ending work. It is important to reflect upon achievements, milestones and challenges that have been overcome.

- Sharing of best practices is helpful and provides opportunities for collaborative problem solving.

- Stay the course. When hard work gets challenging, it can be tempting to refocus.

- Data will inform when a goal is no longer required or has been met. There will be temptations along the way to sign on for new projects or to follow initiatives that are presented externally. If these initiatives do not align with the current work of the board, they will only cause interruptions and incoherence to the on-going work of the board.

- We must connect our teachers; putting people together is critical servant leadership. Teachers must know who is in their network, where they can go to learn and what they can provide to others for their learning.

- All staff at all levels of the organization must feel that they are being invested in. It is critical that everyone feels genuinely valued.

- Collaborative and jointly owned work takes time and effort. Relationships must be built with the people who will help you advance the agenda.

- The process must "unlock the potential" of principals and vice-principals, of teachers and of students.

- Senior administration requires a coordinated work plan. There cannot be anyone working in silos to achieve their own goals. Collaboration must occur at every level of the organization and it must start with the senior level.

- A succession plan is important to keep the work agenda moving forward. Sharing vision with future leaders helps to create coherence and continuity.

- Understand that unions do not traditionally put the needs of students first, as they are there to protect their own members. It is critical that union representatives are offered the opportunity to understand the common vision and are offered a voice at the table in order to support the work of the board.

- It is important to encourage problem solving at the ground level before communicating directly to senior administration. School administrators should be given a chance to problem solve at the school level before communication reaches outside of the school. There still needs to be respectful communication in schools and opportunities to solve problems "in-house."

- Compliance with regulations can be unavoidable. Although they do not always put the needs of students first, it is important that communication accompanies regulations that exist.

- Efficacy is not about facilitating a "complaints department." It should offer venues for problem-solving and discussions to occur.

- "Flattening" an organization from a hierarchy to a linear model can challenge some individual's sense of power and control. It is something that takes a great deal of time and conversation and, in some cases, there will not be consensus that all members of an organization should have an equal voice.

- Change does not happen overnight. There will be a sense at times that change is not happening fast enough, and waiting for change to occur will take patience and flexibility.

- All decisions in a school board should filtered through the lens of doing best for students. Putting students first often means that adults come second. For some, this will be a hard change to embrace but most will agree that it is the right thing to do. It will require uncomfortable conversations to be had and decisions to be made, but if made with the best interests of children at the forefront, will be very hard to argue with.

Next Steps

While there has been an incredible impact on the board, through the efficacy work over the past few years, there is still much work to be done. As more discussions take place, there is the responsibility of acting on feedback and concerns where appropriate. Reflecting on the growth and accomplishments that have been achieved over the past four years creates a sense of pride with many who work for the School Board.

Among those people is the Director. He is now the longest standing Director that has held this position since amalgamation in 1997. He feels that while moving forward with the efficacy agenda in the board remains a priority, it is critical that the board cannot go backwards. There needs to be continued coherence of the work going on in all areas of the board and that there cannot be work being done in silos. He feels that senior level administration must continue to be visible and accessible to all stakeholders in the system. I believe this speaks to the belief that a servant leadership style and the need for visibility, community building and listening to others; all qualities of servant leadership (Greenleaf, 1970).

The Director suggests that an important next step is to set goals for student efficacy in the board. He wants to ensure that students have an authentic voice and that students in the board can speak about the needs and the life of a young person growing up in Northern Ontario. Listening to students and including them in a flattened system, speaks further to a servant leadership style and also that of an elder.

As per the new Efficacy Working Group Terms of Reference, new members will soon replace existing members of the EWG. This will offer others in school and in the board offices, a chance to be the voice for their staff, and offer an opportunity for them to attend board

meetings and senior administration meetings. Educational assistants joined the EWG in February of 2017, making them the final staff group to be represented on the working group.

It has been an incredible learning opportunity to have observed and participated in the transformation of leadership and structure of the board. It will be interesting to see how the work progresses and how succession planning will help continue the work and change that has occurred over the past four years, well into the future.

Note on Research Ethics

Research data that was collected for the purpose of this portfolio, was previously and concurrently collected by an external consultant, hired by the board to inform the Board's internal processes. With the agreement and co-operation of the Board and the consultant, I was permitted to use the primary source data stemming from a longitudinal efficacy study for the purpose of this portfolio. For this reason, I was granted permission to be exempt from having to apply to the Research Ethics Board for ethics approval.

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