AN EXPLORATORY CASE STUDY OF ADMINISTRATIVE LEADERSHIP: THE CASE OF DR. WESLEY C. LORIMER

BY

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A Thesis
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ABSTRACT

The purpose of this exploratory case study of Dr. Wesley C. Lorimer's leadership performance was to determine whether his behavioural pattern as a senior administrator in the Winnipeg School Division No.1 from 1949 to 1966 matched the behavioural pattern of Larry D. Terry's model of the bureaucratic leader as "conservator." The three research questions of the study related to the preservation of institutional integrity were:

1) As a result of Dr. Lorimer's leadership was the mission of The Winnipeg School Division No.1 conserved?

2) As a result of Dr. Lorimer's leadership were the values of The Winnipeg School Division No.1 conserved?

3) As a result of Dr. Lorimer's leadership were supports conserved and/or given to The Winnipeg School Division No.1?

A case study approach was selected because it facilitates the collection of data related to areas of human behaviour and motivation that are not available through observation. Data for the case study were gathered from two primary sources: interviews with Dr. Lorimer (11) and selected respondents (8), and a variety of documents relevant to the case study.

Dr. Lorimer conserved the mission of The Winnipeg School Division No.1 by ensuring that the executive authority of the School Division to educate its resident pupils was not eroded by contextual circumstances that included an

unprecedented increase in pupil numbers, lack of adequate facilities to accommodate the increased number of pupils, lack of qualified teachers to serve the educational needs of all pupils, the reorganization of the administrative structure of the School Division, and the potential threat to its geographical integrity as a result of boundary changes proposed by the REPORT OF THE MANITOBA ROYAL COMMISSION ON EDUCATION.

Dr. Lorimer conserved the values of The Winnipeg School Division No.1 by ensuring that his executive cadre was both viable and appropriately composed as is necessary in order to preserve the core institutional values that defined the distinctive competence of The Winnipeg School Division No.1.

Dr. Lorimer conserved external support by creating and sustaining a favourable public image that increased the likelihood that Winnipeg No.1 would continue to receive support (resources) from different external supporters, such as the provincial government. Supports were also given to Winnipeg No.1 by organizations such as the Winnipeg Chamber of Commerce. Internal support was conserved through Dr. Lorimer's efforts to build and sustain commitment among the elected political officials of the School Board in its view of the value of education.

In view of these findings, it was concluded that the primary motivation behind Dr. Lorimer's actions was to preserve the institutional integrity of Winnipeg No.1.

Significantly, the study illustrated the relevance of Terry's model to the interpretation of Dr. Lorimer's leadership performance. The study also established the importance of contextual circumstances to an understanding of leadership, including the motivation behind the leader's actions. In fact, the study showed that one does not need to be a "great man" or "great woman" in order to be effective, and that the leadership of so-called "non-heroic" leaders like Dr. Lorimer, who eschew revolutionary changes in favour of prudent and evolutionary changes, was dynamic, marked by continuous activity, productivity, autonomy, and creativity.

The study was also significant in that it marked the first time that Terry's theoretical framework has been applied to the administrative leadership of a Canadian school superintendent, with significant success. The study also served to endorse the new Educational Leadership Constituent Council (ELCC) standards for practice by school leaders. Terry's model of the administrative leader as conservator was validated, but some refinements to the model were suggested.

Dr. Wesley Crawford Lorimer

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CHAPTER 1

NATURE OF THE STUDY

Introduction

This is an exploratory case study of the leadership of Dr. Wesley C. Lorimer, one of Canada's top educational leaders. Until now, little has been previously written about the life and accomplishments of Lorimer - a career public servant in the province of Manitoba from 1949 until his retirement in 1981. This is hardly surprising, says Paul Thomas, because far less is written about leadership in the public sector than in the private sector, especially leadership at the administrative level within government.[1]

Public sector leadership is characterized by relationships with a broad range of outside institutions and actors and thus is subject to greater openness to external influences and interdependence among organizations than is the case with private firms. Lack of recognition for an individual's achievements may be appropriate given that the role of the public servant is to make his or her contribution not in a single indelible or heroic endeavour but in manifold and innumerable inputs to the policies and practices of the institution(s) he or she serves. And so, for these reasons, little is actually known about the leadership or valuable

contributions of these so-called "non-heroic" leaders. This lack of understanding, coupled with a tendency to ignore and at times to belittle the contributions of career public servants in the recent leadership literature, has fostered a perception of most administrative leaders as either timid, unimaginative technocrats who are incapable of taking risks, who avoid conflict, and who are driven by self-interest and narrow purposes. In contrast, contemporary leadership literature celebrates and extols individuals who are bold, creative, innovative, and ambitious. Such leaders (Lee Iaccoa of Chrysler or Jack Welch of General Electric) are said to have "made a difference."

Some administrative theorists, most notably Doig and Hargrove (1987), have attempted to counteract the pessimistic view that public sector leaders make very little difference by adopting a conceptual framework governed by the principles of business and innovation in which administrative leaders are characterized as entrepreneurs.[2] Instead of calling for politicians with foresight, principles and decisiveness, greater faith is expressed in the role of visionary, bold, decisive and entrepreneurial public servants who can break free of the constraints of the political process. If, however, public servants adopt more political roles of interacting with competing interests, brokering competing demands and claims and responding independently to clients, they will threaten to usurp the constitutional right of politicians to set direction for society.

Larry D. Terry does not endorse the view of leaders of public institutions as entrepreneurs or heroes who are willing to sacrifice everything to "make a difference", because (1) implicit in this view of leadership is a coercive conception of authority that is based on domination and forced submission; (2) leaders are viewed as being effective, only if they successfully implement revolutionary changes that result in the radical reconstruction of an organization's technical, political, and cultural systems; (3) the heroic conception of leadership encourages the abandonment of tradition (a set of established values and beliefs which have persisted over several generations), the normative anchor that governs the rational action of administrative officials; and (4) implicit in the heroic conception of leadership is the notion that innovative or visionary leaders within public institutions should become central to the process of governance.[3]

Terry has set out a model of the administrative leader as one who preserves institutional integrity. He calls leaders who perform this function "administrative conservators." The preservation of institutional integrity normally involves controlled adaptation to changing circumstances, while at other times a more protective approach to leadership is required in order to preserve viable and legitimate governmental institutions, practices, and values. Maintaining integrity prevents institutional decay and continually enhances the specific capacities/competence of the organization to perform its assigned mission. This does not mean, however, that

conservators fear change. Rather, their actions are guided by an enduring concern to achieve a balance between an institution's past and its anticipated future - between respect for constitutional principles and traditions and the need for flexibility, and between the adoption of necessary changes and a concern for the manageability and even the reversibility of particular changes.[4] The guardianship role of the "administrative conservator" provides a more meaningful framework for thinking about the style and purpose of administrative leadership in the public service context because it suggests a leadership approach that lies between the "great man" who is capable of heroic acts and the characterless technocrat who is driven by narrow purposes. In other words, one does not cease to be a "leader" just because the goal is stability or continuity rather than innovation. But, what, exactly, is leadership?

There is, in fact, no agreed upon definition of leadership, despite the immense effort of leadership researchers to grasp its meaning.[5] Leadership is an elusive and contestable concept partly because it is a social construct and partly because it derives meaning from the particular context in which leadership is being exercised. Despite the controversy surrounding the concept of leadership, Rost has identified a number of common propositions about which leadership researchers might agree. First, leadership is a relationship based on authority, which is defined as using influence to have an impact on other people in the relationship or

group. Though the possession of certain traits (high intelligence, for example) may be important, how these traits are used in a particular situation determines whether leadership occurs. Second, leadership is usually seen as a process in which a two-way flow of influence between leaders and followers exists, but the interchangeability of leaders and followers depends on the situation. Third, there will always be people who assume leadership within groups; "leaders" take more responsibility for initiating action, for communication and for the maintenance of the relationship.[6] Finally, recognition as a "leader" is increasingly seen as something that must be earned in most cases.[7] Assuming that one is recognized as a leader, what are the requirements for successful governance in the public sector?

According to Terry success in government today requires not only leadership, it also requires leaders with good policy ideas and sound administrative systems. Successful governance in the public sector requires collaboration between political and administrative leaders. Collaboration is most effective when politicians and senior public servants recognize the differences in their respective roles, while realizing that those roles overlap, to some degree, and that they share a common space in the policy-making process. Senior public servants have a legitimate role to play in policy-making based upon their technical knowledge of government programs and the context in which these programs operate, while elected political officials can claim the

democratic right to give direction to government. There is a need for balance between elected political leadership, therefore, to ensure democratic decision-making and accountability, and public service leadership to ensure the appropriate use of expertise and experience. And when the relationship between politicians and public servants is based on mutual respect, trust and confidence, the result will be a strengthening of the individual and collective capabilities and improved political leadership.[8]

What is missing from current leadership studies, then, is an in-depth understanding of how real-life top civil servants went about their administrative roles in different circumstances, how those circumstances shaped their leadership, what their achievements were, and whether or not their leadership made a difference. Hence, this study is exploratory in the sense that it is the kind of empirical study which we badly need before we can begin to properly understand public sector leadership. We also need more of this type of research as an antidote to anonymous institutional history and desiccated administrative theories. Unfortunately, not all persons who reach senior administrative positions are "leaders" in the sense that they are seen, in retrospect, as having made an important contribution to public service. Perhaps that is appropriate, suggests Thomas, given that in most political systems public administrators are expected to play a relatively anonymous role and leave publicity, credit and blame for the actions or inactions of government to the elected politician.[9]

Lorimer's leadership, however, was recognized. The honours and acclaim that he received from public institutions, elected political officials, from his associates in education and from citizens in general for his contribution to the public good attest to the fact that he was judged to be a "leader" by those who were capable of evaluating public sector leadership. Lorimer was acknowledged to be a leader partly because he was successful, and yet, by all accounts, his approach to leadership was not heroic but neither was it timid; rather, it lay somewhere between these two extremes. Thus, Lorimer was selected for this study, because his approach to leadership supports Terry's proposition that something more does exist between the traditional (and stereotyped) image of the cautious public administrator and the celebrated image of the public administrator as a risk-taking entrepreneur. The examination of Lorimer's leadership career below affords some insight into the experiences, career passages, and achievements that shaped and refined his leadership.

Preparing for Leadership

Wesley Crawford Lorimer was born in Regina, Saskatchewan in 1913. One might say that education was in his blood from the very start, because his mother was also a member of the teaching profession. In 1931, at the age of eighteen, Lorimer was awarded a "first class" teaching certificate from the Province of Saskatchewan. His first teaching assignment coincided with the "Great Depression".

But he was lucky in that his school (Irvington School) was located in the northern area of the province around Melfort (Saskatchewan), where there was sufficient rain to grow grain crops, which afforded him a modest salary ($750.00 per year). The meagre amount he was paid in 1931 was based on commodity prices for grain crops that were actually less than one half of what they were in 1929. In 1933, Lorimer left the rural area and was hired as a resource teacher at Queen's Park School in Regina. He also began taking extra mural courses offered at the University of Saskatchewan. Interestingly, by 1940, his annual salary had slowly crept up to a point where it reached $1440.00.

Lorimer earned his Bachelor of Arts degree from the University of Saskatchewan in 1940. In 1942, he earned his Bachelor of Education degree from the University of Saskatchewan. During the summer of 1942, he was invited by the Dean of Education to teach a class at summer school in Regina. It was during this period that he received his first administrative appointment as a vice-principal in the Regina public school system, and he began to take graduate courses leading to a Master of Education degree from Columbia University, New York. He chose Columbia because the Dean of Education at the University of Saskatchewan had a connection with the university and its well-regarded Teachers' College. Lorimer considered moving to New York but this plan was put in abeyance when he joined the Royal Canadian Air Force (RCAF), and took a course in navigation leading toward qualification as a navigation

instructor. He served in that capacity for the remainder of the War.

On discharge from the RCAF in 1945, Lorimer was appointed in 1946 to the teaching staff of the Provincial Normal School in Moose Jaw, Saskatchewan. In the meantime, the Department of Veterans' Affairs (DVA) had begun to provide "rehabilitation grants" to teachers who were demobilized from the armed services so that they could pursue post-graduate studies in educational administration, educational psychology, educational sociology, the history of education, or educational finance that were not available at Canadian universities. The courses were offered at several prestigious American universities: Chicago, Columbia, Harvard, Minnesota, Northwestern, and Stanford.[10] Lorimer applied to the doctoral program at Columbia University and was accepted. He was also able to get credit for the M.Ed. courses he had taken at Columbia prior to the outbreak of hostilities. Granted leave from the Normal School in Regina, he earned his Master of Arts degree and then his doctoral degree (Ed.D.) in 1948. Lorimer's post-graduate studies included courses in administration, educational research, statistical procedures, and problems of staff personnel. His thesis, The Development of the Program for Teacher Education in the Normal Schools of Saskatchewan, advocated a contemporary approach to teacher training that would enable new teachers to meet the needs of their students at a time when increased industrialization and urbanization were imposing new demands on

society, especially in the workplace. In the fall of 1948, Lorimer accepted a posting as Superintendent of Schools in the Gull Lake area of Saskatchewan.

During that same year Lorimer's mother-in-law, Mrs. Anne H. Moore, who was in Winnipeg, Manitoba visiting her other daughter, Mrs. Louise Brown, came across an advertisement in the local newspapers inviting applications for the position of Director of Research and Personnel in the School District of Winnipeg No.1. This position originated out of an external audit of the School District of Winnipeg No.1 conducted by Dr. W.C. Reavis, University of Chicago, at the behest of the School Board. Lorimer applied for the position and was accepted, beginning work in July of 1949.

In 1949, the superintendent of the School District of Winnipeg No.1 was Dr. J.C. Pincock. He retired in 1950 and was succeeded by Dr. Herbert MacIntosh, Assistant Superintendent of Secondary Schools. Ewart Morgan, Assistant Superintendent for the Elementary Schools was appointed to the secondary position, and A.D. Thomson, Superintendent of Public Schools in Saskatoon was appointed to the elementary school position. Shortly thereafter, failing health forced MacIntosh into an early retirement and the School Board appointed Lorimer to be the acting superintendent in 1952 until a new superintendent of schools could be appointed. In the meantime, Winnipeg No.1 mounted a country wide advertising campaign for a new superintendent. In the end, it was Lorimer who received the

appointment in the spring of 1953. He became the youngest man, at the age of forty years, since before the turn of the century to hold the office of the Superintendent of Schools in the School District of Winnipeg No.1. For personal reasons, Ewart Morgan relinquished his position as Assistant Superintendent, Secondary Schools, and G.T. MacDonell was appointed in his stead.

Thirteen years later, in 1966, Lorimer resigned as the superintendent of Winnipeg No.1 in order to accept an appointment as Deputy Minister in the Department of Education, province of Manitoba. His appointment, however, did not come into effect until 1967. During his career as the administrative head of Manitoba's largest school system, Lorimer was active in a number of different organizations.[11] In 1957, Lorimer was elected to a two-year term in the Council of the Winnipeg Chamber of Commerce. He also served as President of the Rotary Club of Winnipeg from July 1st of 1962 to June 30 of 1963. In that same year, he served as Chairman of the Advisory Board in Manitoba's Department of Education. In 1965, Lorimer was elected President of the Canadian Education Association (CEA).

Later in 1965, Lorimer was elected to the position of Vice-President of the Canadian Association of School Superintendents and Inspectors (CASSI). Prior to his leaving The Winnipeg School Division No.1 in 1966, he was selected to be a fellow of the CEA-Kellogg (W.K. Kellogg Foundation) Project in Educational

Leadership to study programs of compensatory education, aimed at improving administrators' professional competence, in two centres in the United States. These programs were meant to help administrators to better serve the educational needs of Aboriginal people. In 1969, as a result of his work in the CEA and CASSI, Dr. Lorimer was selected as a Visiting Commonwealth Fellow to visit Australia for a three-month period in order to observe Australian education. On the way to Australia, he stopped in Japan so he could study the application of television as a teaching tool in a school setting. On his return trip to Canada, he stopped in American Samoa where television was used in all schools to upgrade the quality of education in that country. In addition, he visited schools in Britain, Switzerland, Sweden, and the United States.

On October 21, 1969, during fall convocation, the University of Winnipeg honoured Lorimer by conferring on him an honorary Doctor of Laws degree. Two years later, in 1971, he was appointed a Fellow of the Canadian College of Teachers. In October of 1973, he was appointed Manitoba's Deputy Minister of Colleges and Universities Affairs (which was later renamed the Department of Continuing Education and Manpower), a post he held until 1978. In 1974, Lorimer was made an honorary and lifetime member of the Manitoba Teachers' Society (MTS).

In 1978, Lorimer found himself in a familiar site when he was re-appointed to the position of Deputy Minister of Education, when

the Departments of Continuing Education and Manpower were re-unified under the previous title, the Department of Education, by the newly elected Progressive Conservative Government of Sterling Lyon. One year later, in June of 1979, Lorimer decided to retire. It was a short-lived retirement, however, because in September of 1979, the College of Physicians and Surgeons of Manitoba named Lorimer (also named were Reverend Bruce Miles and social worker Ralph Kuropatwa) as "lay" members of the inquiry committee. The purpose of the committee was to hear evidence from counsel concerning charges of medical incompetence or unethical conduct laid against doctors.

In 1980, Keith Cosens, Minister of Education, appointed Lorimer Chairman of the Universities Grants Commission, an intermediary body that allocated the budget among Manitoba's three universities. Fittingly, perhaps, in 1981, he finished his career at the same place it had begun, in the Winnipeg School Division No.1 as its interim Chief Superintendent. In 1982, after thirty-two years of public service in Manitoba, Lorimer retired, at which time the University of Manitoba bestowed on him an honorary Doctor of Laws degree. Fourteen years later, in 1996, upon the occasion of its 125th anniversary, the Winnipeg School Division No.1 recognized Lorimer "as an individual who had made a difference".[12]

In conclusion, a case study of W.C. Lorimer's career provides the opportunity to appraise an alternative conception of public sector

leadership that is not prominent in the leadership literature and that challenges emerging ideas about the preferred leadership role of senior public servants in the future. There are lessons to be learned about educational leadership and administration, based upon a theoretically informed study of the career of one of Canada's top educationists. The study may be useful to practising administrators and to professors in departments of educational administration whose job it is to prepare future administrators.

Statement of Purpose

The purpose of the study was to test the applicability of Larry D. Terry's model of conservatorship to the interpretation of one administrative leader's performance. Thus the study sought to ascertain whether Lorimer's performance as superintendent of Winnipeg No.1 matched the expectations of leadership behaviour prescribed by Terry for the conservator with respect to the preservation of institutional integrity.

Methodology

The predominant concern in this study was to achieve an in-depth understanding of Lorimer's leadership, and then to compare and contrast his behaviours to those attributed to the conservator by Terry. The case study approach has been selected because it facilitates the collection of historical data. A case study could involve the methodology of participant observation, but that was

not possible in this study. The case study approach is especially useful for examining a contemporary phenomenon within its real life context.[13]

According to Yin, a case study is a qualitative inquiry that

1. investigates a contemporary phenomenon within its real life context; when
2. the boundaries between phenomenon and context are not clearly evident; and in which
3. multiple sources of evidence are used.[14]

Best observes that case studies are usually prepared by means of the personal interview and supplemented by other types of data (documents). Best also contends that the personal interview is a particularly effective data gathering device in areas where human motivation, values and attitudes are the catalyst for certain actions, including political activity.[15]

The case study approach differs from the conventional method of social science research in that the former approach is characterized by:

1. a range of research which tends to be more intensive than extensive;
2. reports which generally emphasize narrative description, interpretation and synthesis, not analytical frameworks, relationships between variables, and research findings, and
3. objectives which stress the particular and unique rather than the generalizable.[16]

In fact, the aim of a case study, asserts Bromley, is not to find the "correct" or "true" interpretation of the facts, but rather to

eliminate erroneous conclusions so that one is left with the best possible, the most compelling interpretation.[17]

Anchored in real-life situations, the case study is concerned with presenting a concrete picture of the set of phenomena and its uniqueness. A case study can be used to test pre-existing hypotheses; it also offers insights that can be construed as tentative hypotheses that help structure future research; and it can play an important role in advancing a field's knowledge base when the study is informed by theory and/or tests theory.[18]

However, certain problems attend the use of the case study approach to leadership. First, any approach to studying leadership that allows the subject to evaluate his own leadership invites a distortion of the truth. Since events are viewed and interpreted differently by different people, documents, public records, and the recollections of those with whom the subject shared his thinking are critical in supporting (or refuting) the subject's recollections or his interpretation of past events.[19]

Second, highlighting the individual contribution or role carries the danger of distorting the historical context and institutional setting in which a particular actor is located. When emphasis is placed on one individual, it is often at the expense of the wider group. Hence the determinism inherent in an institutional perspective can be greatly exaggerated. Public administration without people may be theoretically pure, observes Theakston, but

historically (and contextually) arid.[20] Theakston's objection requires some further explanation with respect to the "institutional" and "neo-institutional" approaches and the related concept of "determinism".

The neo-institutional approach reacts to the deterministic view that all individuals act on the basis of self-interest, narrowly defined. Neo-institutionalism argues that institutions represent both constraints and opportunities for leaders. Leaders' values and behaviour are shaped and constrained by the institutional context. What Theakston seems to be objecting to is the "reification" of institutions - presuming that they are real or concrete and that they necessarily act in a unified way.

Third, when it comes to establishing a clear link between individual actions and policy outcomes, case studies are problematic. Put simply, was the action performed by the subject one that would have been performed by any individual in the same situation or role? Assessing an individual's actions and impact against what might be predicted or expected on the basis of his institutional identity or location may be useful in this context.[21] Greenstein restates the problem as establishing actor and action dispensability: is the action one that would have been performed by any actor in the same situation or role? The job of the researcher becomes one of establishing whether some action of his subject was a necessary condition of a historical outcome

(action dispensability), and, if so, whether the action needs to be explained in terms of the subject's personal attributes (actor dispensability).[22] How, then, does the case study approach facilitate theorizing about leadership?

There are several ways in which case studies facilitate theorizing about leadership. First, according to Theakston a case study can provide evidence of the development and acquisition of leader attributes.[23] Gronn and Ribbins would agree with Theakston and point out that during the incumbency stage of their four-stage leadership career framework a new leader undergoes formal or informal induction into his new institutional role. Thereafter, every subsequent role switch (or career passage) requires further induction into organizational and workplace norms. And since institutional roles are comprised of constraints, demands and opportunities, the precise mix of these elements and exact makeup of the role shape the fine detail of the expression of the new leader's institutional identity, style, and outlook.[24]

Second, unlike biographical method, the case study approach does not afford a longitudinal study of a leader's life. Instead, the case study focuses on an individual's leadership over a specific time period during his career. Such an approach, suggests Theakston, is sufficient to explain why subordinates attribute leadership status to particular individuals, the extent of agreement among those attributions, and how and why, in the long

run, those attributions are either sustained by what leaders do - or fail to do.[25]

Third, the case study, explains Theakston, can be used to illuminate the essential nature of the relationships between a bureaucratic leader and the organization, the people in the organization, the people in the external community and organizational culture (shared meanings and values, the unwritten rules, and the values and norms that are predominant).[26]

Fourth, Theakston suggests that examining an administrator's actions at critical junctures and key turning points in an institution's historical development, through a case study approach, would contribute to an understanding of that administrator's role in institutional change, whether it was critical or incidental.[27] This is not to say, of course, that an individual's leadership is only visible during defining moments. But there may be critical occasions when an administrator exceeds his "institutional self".

Furthermore, looking at how a leader exercised his leadership during an institution's historical development serves to illustrate the pressures and constraints, and indeed the opportunities for manoeuvring he/she experienced during that critical time period.[28] Changing conditions enable the individual leader to demonstrate greatness when a community's or organization's character is tested by crisis. At the very least, a

case study goes some way towards explaining what leaders do and why they do what they do.

As this was an exploratory case study of administrative leadership, special attention was paid to the incumbency stage of Lorimer's leadership career, because it best displays how he expressed his leadership in Winnipeg School Division No.1 - especially at a time when the School Board was just beginning to implement substantive changes in its policies, practices, and procedures to enable the School District to meet recent changes in society (urbanization and industrialization, for example), including unprecedented growth in public education enrolment. As Superintendent, Lorimer played an important role in the implementation process by shaping and promoting policy options; hence, it was important to understand what (a) he sought to change, discard, retain, or strengthen, and (b) the role "context" (demographic, institutional, political, economic, and social circumstances in which the school system was located) played in shaping the "choices" he made in performing his role.

Data Collection and Sources

Considering the nature and purpose of the study, two primary sources of data were crucial. These were documents and the personal interviews conducted with Lorimer and select respondents, such as the chairperson of each successive School Board to whom he reported. These sources constituted the data from which the

answers to the fundamental questions of the study were gleaned.

Documents. The following documents were used to establish Lorimer's approach to leadership in relation to Terry's model, and to assess and/or corroborate respondents' recollections and perceptions of past events involving Lorimer's leadership, especially his recollections of what he said he did in different circumstances:

1. Articles from Canadian daily newspapers: The Winnipeg Tribune (1953-1979, University of Manitoba Archives) and the Winnipeg Free Press (1949-1981, Winnipeg Free Press Archives),

2. The Winnipeg School Division No.1 ANNUAL REPORTS (1949-1966),

3. Report of the Directed Self Survey Winnipeg Public Schools Committee on Field Services, Department of Education, University of Chicago, September, 1948,

4. Minutes of School Board meetings for the years 1946 to 1966, and

5. BRIEF PRESENTED TO THE ROYAL COMMISSION ON EDUCATION By THE TRUSTEES OF THE SCHOOL DISTRICT OF WINNIPEG No.1 (November, 1957).

Secondary sources included reviews of Terry's model by American and Australian scholars, historical accounts of The Winnipeg School Division No.1 contained in books and theses, and articles related to the operation and/or administration of Winnipeg No.1, or about past administrators of Winnipeg No.1.

Certain documents were unavailable to the thesis writer. Prior to 1981, it was the practice of The Winnipeg School Division No.1 to discard all memoranda as well as reports submitted by different

officers of the School Division (including the superintendent). "Minutes" of Board meetings held "in-camera" are available only after 1981.

Interviews. Ten personal interviews and one telephone interview (approximately one hour each) were conducted with Lorimer. Personal interviews were also conducted with eight individuals who satisfied one or more of the following criteria:

1. The individual was a public servant, politician, associate, or subordinate who has special knowledge about Lorimer's leadership, based on his/her work in the school system, and

2. The individual was influenced by the leadership of Lorimer and can provide evidence to that effect.

Some commentary about the interviews is necessary to indicate how the subject of the study was involved. Dr. Lorimer put the interviewer at ease. He gave freely of his time. He answered all questions in a thoughtful manner, and, on occasion, volunteered additional information in an effort to be more helpful. He read each of his eleven interview transcripts with an eye to ensuring their accuracy, and made slight adjustments to each in order to clarify or to reinforce certain points. The interviews are important because they are the repository of the oral history of an elite leader about a specific time and place in history of the development of Manitoba's largest school division, and, thus, constitute an invaluable source of information about administrative leadership, and about the growth and expansion of

the Winnipeg school system.

The interviews with key respondents were used to gather the personal opinions, insights, observations, and anecdotes of key respondents about Lorimer's values, beliefs, attitudes, behaviour in different situations. But, whether an individual ought to be - and will be - recognized as a leader is, as Kouzes and Posner suggest, "in the eye of the follower."[29] So, it was especially important to examine subordinates' perceptions of Lorimer's leadership behaviour to see if they matched what he said he did, and to confirm the importance (unduly heroic or modest) he attached to specific actions.

Thus the interviews were intended to:

1. Establish Lorimer's approach to leadership, based on his leadership actions and activities during the incumbency stage of his leadership career in Winnipeg School Division No.1,

2. Gain valuable interpretations of Lorimer's value framework, including an estimate of their significance in relation to how Lorimer exercised his leadership,

3. Assess motive and cause (grounded in the context-related data, connected to events and traceable),

4. Corroborate the subject's interpretations and recollections of how he exercised his leadership in Winnipeg School Division No.1,

5. Ensure clarity or accuracy of facts related to Lorimer's leadership in Winnipeg School Division No.1, and

6. Alert the writer to additional sources of data (or potential interviewees) which might not have come to his attention otherwise.

All interviews were tape-recorded and then transcribed in note form by the researcher. Transcriptions were returned to respondents so that each respondent had an opportunity to ensure the accuracy of his/her recollections. The interviews were semi-structured with some questions common to all respondents (Appendix A - Letter to Lorimer; Appendix B - Letter to Potential Interviewees; Appendix D - Reply to the Request to be Interviewed; and Appendix D - List of Interviewees).

Interview schedule. An interview schedule was developed by the researcher to facilitate the collection of data concerning Lorimer's primary motivation, and behaviour during the incumbency period of his leadership career in Winnipeg School Division No.1 (Appendix E - Interview Schedule). The interview schedule guided the collection of data about Lorimer's leadership, using as its basic design the essential elements of Terry's theoretical model of bureaucratic leadership (see Chapter 2). Each element of Terry's model was reproduced in the schedule as a series of interview questions, tailored to elicit responses about aspects of Lorimer's leadership. A set of questions common to all groups was developed and included in the schedule. Interviewees' responses to these questions enabled the researcher to determine the extent to which interviewees' perceptions of Lorimer's behaviour matched what he said he did.

Limitations of the Study

First, data collected during the interviews may be subject to errors of judgment, memory, perception, and even bias (conscious and unconscious) with a tendency to overemphasize unusual events. Second, the data collected during the interviews was perception-bound (and historical in nature rather than contemporary) and thus cannot be presented as indisputable facts. Consequently, any conclusions derived from the data should not be construed as the singular truth, or automatically generalizable to other jurisdictions. Third, there is always the possibility of missing or lost documents, or that there may be inaccuracies or inconsistencies embedded in them (newspaper articles, for example). Fourth, no attempt was made to explain how Lorimer's socialization or leadership preparation prior to the *incumbency* stage of his leadership career affected his value framework or shaped his leadership.

Significance of the Study

The study will be significant for several reasons. First, a case study of a top civil servant has didactic value from which teachers, school administrators and other leaders can learn about administrative leadership that is clearly valuational, contextual, and instructive. Second, looking at the personal qualities, career experiences, and achievements of a top civil servant can illuminate the exercise of administrative leadership within a

particular institution, as well as the changing role and culture of that institution. Third, examining the development of a top civil servant's leadership within a specific context affords some badly needed insight into the development of the nature and meaning of bureaucratic leadership, and, thus, affords a better understanding of an administrator's role in institutional change. Fourth, the study provides both the material and a viewpoint from which to assess change over time in the character and working of other institutions. Fifth, when this study is compared to other case studies of administrative leaders, it may be possible to generalize about the essential skills, personal qualities, relevant knowledge, experiences, and other factors associated with "effective" leadership in the public sector. Sixth, it is wrong to assume that "leaders" by definition must be transformers, innovators or heroes -- cases where administrative leaders were playing conservative roles offer important lessons about leadership too. Finally, this study is significant because it shows how a case study approach to leadership can be used to restore context to the study of leadership in public institutions.

Outline of the Chapters

Chapter 1 describes the nature and scope of the study. Chapter 2 examines Terry's conceptual model of bureaucratic leadership and presents the major research questions of the study. Chapter 3 provides the contextual backdrop of the study. It reveals the

context of incumbency - those demographic, institutional, socio-cultural, economic, and political circumstances of Winnipeg School Division No. 1 that Lorimer paid attention to as "context" - at a time when the School Board was attempting to transform itself into a modern school-administrative structure. Chapter 4 assesses Lorimer's leadership approach against the contextual backdrop established in the preceding chapter. The purpose of this chapter is twofold: to reveal the primary motivation behind his actions, and to address the major research questions of the study as to whether or not Lorimer's leadership performance matches that of the conservator. Chapter 5 presents the conclusions that emerge from the study, along with implications for theory and practice that seem warranted. In particular, the chapter discusses the relevance of the Terry model and how it can be refined.

NOTES TO CHAPTER 1

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[5] Leithwood, K. and Duke, L. (1999). A Century's Quest to Understand School Leadership. In Joseph Murphy and Karen Seashore Louis (Eds.). Handbook of Research on Educational Administration (2nd ed.). San Francisco: Jossey-Bass Publishers, 45.

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[11] Arnold Reimer, telephone interview with author, 10 March, 2002. In 1956, Dr. Lorimer established the Manitoba Association of School Superintendents (MASS) with a membership of six superintendents. According to Mr. Arnold Reimer, Executive Director of MASS, the membership has now reached fifty-one chief executive officers for the province of Manitoba, of which nine are situated in metropolitan Winnipeg. Dr. Lorimer also served as the Association's first president.

[12] Dr. Lorimer and his wife Myrtle have been married for 62 years. They have 3 children. Jim is a publisher (Halifax), and has a Ph.D. from the London School of Economics; Rowly is a professor at Simon Fraser University, has a Ph.D. from the Ontario Institute of Education, and lives in Vancouver; Betty is a graduate of the University of Manitoba in Early Childhood Education and is a teacher. She plays in the Ottawa Symphony Orchestra. Myrtle has been very active in community affairs and has been a member, a director, and president of a number of organizations. She received a Women of the Year award from the YWCA in 1984.

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CHAPTER 2

REVIEW OF THE LITERATURE

Introduction

The review of the literature proceeds as follows. The first section provides a brief summary of Leithwood and Dukes's depiction of six models of educational leadership that appear in the scholarly literature. Particular attention is paid to the perspective afforded by each model in order to determine whether Terry's model offers something new/different. The second section examines Terry's model; it begins with a brief biographical note about Terry and his rationale for developing a model of bureaucratic leadership. The concept of institutional integrity is examined next, followed by an examination of each of the three critical functions (conserving mission, conserving values, and conserving support) conservators perform to preserve integrity. The third section establishes the status of Terry's model in the leadership literature. The fourth section provides a justification for applying Terry's model to the leadership approach of a school superintendent of a public school system in the province of Manitoba, Canada. The fifth section restates the study's major research question. The final section presents the findings of the literature review.

Wesley C. Lorimer was the educational leader of The Winnipeg School Division No.1, Manitoba's largest public school system. Educational leadership is a frequently studied phenomenon, and Leithwood and Duke have summarized six approaches to educational leadership intended to provide more insight about this subject. Here they are.

Contemporary Models of Educational Leadership

Leithwood and Duke have identified six "distinctly" different models to understanding leadership in educational organizations: instructional, transformational, moral, participative, managerial, and contingent.[1] These models, however, are not "pure" types, as Leithwood and Duke hasten to point out.

> Although they have been presented as distinctly different leadership models, they are by no means pure types. The six approaches are most distinct with respect to their basic foci and the key assumptions on which they are premised.[2]

Leithwood and Duke also point out that the six models were identified through analyses of a representative sample of contemporary literature about leadership in schools, a sample meant to reflect the results of the last century's investigation. The sample consisted of all feature length articles published in four leading English-language educational administration journals.[3] The articles were analysed to determine which models of leadership were mentioned most often. A synopsis of each of the six contemporary models is offered below.

Instructional leadership. Instructional leaders focus, typically, on the behaviours of teachers as they engage in activities directly affecting the growth of students. Hence, instructional leaders concentrate on the growth of students and only look to teachers' growth as a means of enhancing students' performance. Most, but not all, conceptions of instructional leadership allocate authority and influence to formal administrative roles. Instructional leaders possess considerable influence through the possession of expert knowledge (knowledge of best teaching methods, for example). The leadership practice of instructional leaders most often consists of three broad activities: defining the school mission, managing the instructional program, and promoting school climate (collaborative culture). There is a preponderance of literature that supports the contribution of these three practices to student achievement as well as to other types of outcomes, such as improving the technical and instructional activities of the school through close monitoring of teachers' and students' classroom work.[4]

Transformational leadership. The focus of transformational leadership is on the commitments and capacities of organizational members. Transformational leaders provide the incentive for people/staff to attempt improvement in their practices. Transformational leaders are more or less in continuous pursuit of three fundamental goals: helping staff members to develop and maintain a

collaborative, professional school culture; fostering teacher development; and helping staff to solve problems together more effectively. Transformational leaders employ practices (modelling best practices, promoting core values, demonstrating high performance expectations - creating a productive school climate) that help staff members to work smarter, not harder. Transformational leaders resist imposing their own perspectives on the problem-solving group, preferring instead to keep the group on task. Transformational leaders share a genuine belief that their staff members as a group can develop better solutions than the leader could alone.[5]

Moral leadership. The focus of moral leadership is on the values and ethics of the leader. Thus authority and influence are to be derived from defensible conceptions of what is right or good. Values, then, constitute the essential problem of leadership. Hence, if there is no value conflict there is no need for leadership. The issue of the greatest concern to those examining moral perspectives on leadership, then, is the nature of the values used by leaders in their decision-making and how conflict among values can be resolved.[6]

Participative leadership. Participative leadership emphasizes the decision-making processes of the group. Authority and influence with respect to this category of leadership are available to potentially any legitimate

stakeholder in the school based on their expert knowledge, their democratic right to choose, and/or their critical role in implementation.

Increased demands imposed on schools by changing contexts and expectations can only be met by moving, increasingly, toward forms of shared or team leadership. Hence, school leaders will need to adopt more participatory forms of leadership or site-based management (SBM) that are consultative, open, democratic and that involve both teachers and parents, to a greater extent, in school decision-making. SBM usually assumes one of three forms: administrative-controlled SBM, professionally-controlled SBM, and community-controlled SBM.

Administrative-controlled SBM is aimed at increasing accountability to the central district or school board office for the efficient expenditure of resources on the assumption that such efficiencies will benefit students, whereas professionally-controlled SBM attempts to make better use of teachers' knowledge in key decision-making areas as budget, curriculum, and personnel (occasionally). In contrast, community-controlled SBM is aimed at increasing the authority and influence of parents and community members. Thus, schools are held to be more accountable to the community. It is assumed that this form of SBM has important knowledge to bring to bear on key decisions about personnel, for example. However, this type of SBM also assumes that professionals are willing both to be responsive to the values and preferences

of parents and the local community, and are also willing to view parents as partners with schools in the education of their children.[7]

Managerial leadership. This form of leadership focuses on the functions, tasks, or behaviours of the leader and assumes that if these functions are discharged competently the work of other organizational members will be facilitated. Most conceptions of managerial leadership also assume that organizational members behave rationally. Like instructional leadership, authority and influence are allocated to formal positions in proportion to the status of these positions in the organizational hierarchy. Leithwood and Duke also point out that terms like "management" and "manager" frequently appear in papers originating in the UK, especially, but without explicit attempts to clarify meaning.

Furthermore, Leithwood and Duke have identified ten sets of managerial functions. These functions summarize in effect most of the explicit and implicit conceptions of managerial functions in schools that are separate from those leadership dimensions associated with other models. The ten sets of functions include:

- Providing adequate financial and material resources;
- Distributing financial and material resources so they are most useful;
- Anticipating predictable problems and developing effective and efficient means for responding to them;
- Managing the school facility;
- Managing the student body;

- Maintaining effective communication patterns with staff, students, community members, and board office staff;
- Accommodating policies and initiatives undertaken by the board office in ways that assist school improvement;
- Buffering staff so as to reduce disruptions to the instructional program;
- Mediating conflict and differences in expectations, and
- Attending to the political demands of school functioning.

Though there is evidence in the leadership literature that supports managerial approaches to leadership, this support and the meaning of such leadership has to be inferred. According to Leithwood and Duke the functions noted above convey an orientation to leadership that is similar to the orientation found in classical management literature. In other words the managerial approach is quite different from the entrepreneurial, bold, risk-taking and innovative change-oriented view of leadership referred to as "strategic management" in the non-school literature.[8]

Contingent leadership. The focus of this approach is on how leaders respond to the unique organizational circumstances or problems that they face as a consequence of, say, conditions challenging the integrity of their organization, or conditions of work. This approach to leadership assumes that because there are wide variations in the contexts for leadership, the leader can provide whatever response is appropriate. In other words, individuals who occupy formal positions of authority are capable of mastering a large repertoire of leadership practices. In fact, their influence depends on such mastery.

A contingency approach to leadership involves at least four sets of concepts: traits of leaders, characteristics of the situation, behaviours of the leader, and effectiveness of the leader. In other words: What traits under what situations are important to leader behaviour and effectiveness? The basic hypothesis, then, is that traits of the leader and characteristics of the situation combine to produce leader behaviour and effectiveness.

Contingency approaches specify the conditions or situational variables that moderate the relationship between leader traits, behaviours, and performance criteria. However, the evidence in the leadership literature indicates that under one set of circumstances, one type of leader is effective; under another set of circumstances a different type of leader will be effective. Thus, leadership is situational and leadership effectiveness is situational in nature as well.[9] This begs the question, however, about what contingencies are important to how leadership is conceptualised and practiced.

Having examined Leithwood and Duke's six approaches to educational leadership, it can be said that these concepts focus attention on different aspects of the organization. Managerial leadership pays particular attention to organizational policies and procedures. Instructional leadership focuses on the core technology whereas contingency approaches focus on the leader's problem-solving processes, while moral leadership attends to leaders' values.

Transformational leadership emphasizes the importance of followers' commitments whereas participative leadership largely concerns itself with followers' roles in decision-making. Each approach to leadership, then, contributes a piece to the leadership puzzle. However, none of the approaches summarized by Leithwood and Duke examine the leader's responsibility for preserving and/or strengthening his/her agency's particular capacities for performing its main function. Similarly, none of the six approaches to leadership posit strong roles for the leader in organizational governance. More importantly, none of these theoretical models offers a normative theory of leadership in public administration.

The Administrator as Conservator: The Model

Terry is attempting to provide a normative theory of leadership in public administration; his is a theory of what public administrators ought to do to ensure that public bureaucracies fulfil their legislative functions and contribute to democratic life. He relies on three disciplines - constitutional law, managerial thought, and sociological theory - as the foundation for his thinking, and he identifies particular writers who shaped his thinking. In his model, he is attempting to establish that the public agency ought to be seen as a partner in democracy with the political, legislative, and judicial branches of government.

The section begins with a brief biographical note about Larry D. Terry and the rationale for his model.

Larry Terry is part of a group of scholars who believe that leadership is an ethical quality or a matter of character. Leaders, Terry argues, must be concerned with the ethical traditions of the organizations they manage. Thus, he rejects the notion that any progressive management science can maintain the legitimacy of the administrative organization. Instead, innate moral vision replaces modern management science and technology as the basis for leadership.

In Leadership of Public Bureaucracies: The Administrator as Conservator (Sage Publications, 1995), Terry is looking for innovative ways to make public organizations more legitimate and more effective in technological society. In fact, he seeks to reconcile bureaucratic leadership with the democratic process. This is because he believes that large complex bureaucracies are an inevitable part of the twentieth century. Hence, in order to ensure that career public servants will act with the public good in mind, conservators must maintain and preserve institutional integrity.

But, Terry is not willing to accept the business-as-usual managerialist approach to developing modern organizations. He eschews the notion that progressive science can improve and solve for leaders their most pressing concerns. Terry's non-modern or pre-modern approach to leadership, in contrast to

the neo-managerialist approach (neo-managerialism fosters the idea that bureaucratic leaders should assume the role of public entrpreneur), embodies morality, ethics, and trust. Bureaucratic leaders are legitimate (and effective), he argues, not because they are experts in management science, but because they hold to the Constitution (American), mobilize public support, and build and/or strengthen institutional values.[10] Given his philosophical approach to inquiry and his normative concerns, Terry is reacting to the dangers of public entrepreneurship to democracy promoted in the literature on public management.

At present, Terry is an Associate Provost and Professor of Public Administration at the University of Texas at Dallas (UTD). He is the editor of *Public Administration Review* (PAR) at UTD. Terry's achievements include: the American Society for Public Administration's 2000 Presidential Citation of Merit Award for his leadership of PAR, and the American Administration's 1996-1997 William E. Mosher and Frederick C. Mosher Award. Terry is also a fellow of the National Academy of Public Administration. Currently, Terry is working on a new book titled, Administrative Interpretation of Law: How Public Administrators Create Meaning (with Georgetown University Press).[11] The purpose of the following section is to better understand Terry's usage of the concept of institutional integrity.

Institutional integrity. "In the final analysis," writes Terry, "administrative conservatorship is concerned with the preservation of *institutional integrity*."[12]

There are three dimensions to the mindset of administrators who adhere to Terry's model. First, administrators who function as conservators recognize the necessity of growth and change but understand that they must preserve institutional integrity. Maintaining integrity prevents institutional decay and enhances the capacity of the organization to achieve its assigned mission.[13]

The second dimension to the mindset of the conservator concerns the protection of institutional autonomy. Understood narrowly, protecting institutional autonomy means protecting/guarding agency turf, but Terry has adopted a broader definition of autonomy. In fact, Terry is using Selznick's argument that protecting autonomy also means preserving independence "sufficient to permit public bureaucracies to preserve their distinctive values, competence and role."[14]

Third, administrators who function as conservators respond to the environment, and in so doing they continually adapt their agencies to changing circumstances. What this means is that conservator type leaders must interact with elected political officials, individuals, and groups (external and internal) in such a way that the agency remains vital and prospers.[15]

At the very heart of Terry's model is the notion of *institutional integrity*. Terry's use of the concept of "institution" in place of "organization" is deliberate. He explains that for analytical purposes the institution is differentiated from an organization which is a "rational means-oriented instrument guided by the 'cult' of efficiency, whereas an institution is a creation of social needs and aspirations. Institutions, as opposed to organizations, he argues, are adaptive, responsive, and cooperative systems that embody cultural values.[16] He further explains that "institutional integrity" is related to the notion of distinctive competence: the special capacities, abilities and proficiencies possessed by an agency in the performance of its special or main function(s). For example, a school system's main function is teaching. Hence the job of the superintendent is to strengthen and preserve the system's special capacities, its proficiencies and values dedicated to teaching. Thus, the word *integrity* refers to the completeness, wholeness, and intact quality of an entity. In the context of administrative conservatorship, administrative leaders should exercise leadership primarily aimed at preserving the integrity of public institutions. The primary motivation behind the conservator's actions, therefore, is to preserve institutional integrity.[17]

As the foregoing discussion suggests, preserving institutional integrity is complex. Moreover as conditions change, the conservator must change also; he is likely to be called on to perform different leadership roles in response to changing conditions. Citing Carl Friedrich's work, Terry indicates that there is a continuum of leadership roles. At one end is what Friedrich describes as "initiating leadership".[18] The initiating role requires that the conservator pursue innovative courses of action to preserve institutional integrity. He may even have to establish a new system of institutional values when it is essential for the conservation of the institution's distinctive competence. In this regard, the conservator's role may be identified with other forms of initiating leadership, such as the transformational leader.[19] However, change and innovation pursued by the part of the conservator is always guided by a "fidelity" to institutional values and unifying principles.

The initiating type of leader is concerned with strategic change that addresses the entire institution, including its mission, values, personnel, and technologies. Strategic change may be further divided into two distinct types: frame-breaking and frame-bending. Frame-breaking changes are initiated in response to internal pressures and external events and require a radical departure from an institution's standard conduct. In contrast frame-bending changes are initiated in response to external events. Frame-bending

changes are usually seen well in advance of their arrival and they do not require a drastic departure from the past. The conservator, advises Terry, should resist any innovation when it is inconsistent with the performance of existing tasks.[20]

At the other end of the continuum is "protecting leadership". According to Friedrich, protecting leadership provides security for an institution and its way of life, its culture, its beliefs, and interest.[21] Protecting leadership, observes Terry, seeks to strengthen institutional functions, processes, and values and at the same time guards against excessive opportunism. Protecting leadership affords the institution security, because it seeks to strengthen institutional functions processes and values through either incremental change or zero change. Incremental change also consists of two types: fine-tuning and adaptive.[22]

Fine-tuning changes are intended to increase efficiency and coordination of institutional functions and processes as well as to reinforce values, beliefs, and myths. The conservator might seek to refine existing policies or protocols related to the hiring of personnel.[23]

Adaptive changes are pursued in response to external events. These changes are relatively minor in scale; they involve small-scale adjustments to existing tasks. Both fine-tuning and adaptive changes are add-ons. They do not alter the core tasks of the institution.[24]

Zero-change is required when strategic or incremental change will do more harm than good. In other words, suggests Terry, the conservator does not assume, and should not, assume that change for the sake of change is good, or that change is inherently good.[25]

According to Terry, the effective performance of either the initiating or protecting role is not contingent on any particular personality traits or orientations, and although some conservators may possess certain traits that favour one role or the other, they may still be able to perform both. Terry concedes, however, that some individuals may be so committed to a particular role that they are unable to adapt to changing conditions. Further, each role (initiating or protecting) can undermine an institution's integrity if carried too far. Also, the conservator's preferred role may not be well suited for stable or turbulent periods. Reliance on past strategies and practices that were effective in the past may no longer be appropriate. From this one can conclude, as Terry has, that the forces that preserve an institution through time may be the same ones that undermine its integrity.[26] Preserving integrity also requires the conservator to perform certain critical functions, the first of which is conserving mission.

Conserving mission. According to Terry, the mission of public administrations is defined by legislative mandates and other binding acts. Terry argues that the concept of

authority is central to the notion of conserving mission. The administrative conservator, he asserts, is responsible for preserving and nurturing the authority embodied in legal mandates that determine the mission of public institutions. Hence strategies for conserving mission focus on preserving the executive and non-executive authority granted to public institutions.[27]

However, there is, suggests Terry, a critical connection between mission definition (and interpretation), responsible leadership behaviour, and ultimately leadership effectiveness.[28] Put simply, it is important to interpret legal mandates, but it is just as important to define mission based on what it is that the organization does, or is supposed to be doing, that is, its special function. As conditions and circumstances change over time, the conservator must be prepared to redefine mission. And to drive this point home, Terry cites Selznick's admonishment that "Leadership is irresponsible when it fails to set goals and therefore lets the institution drift".[29] To the role of the conservator, then, must also be added a concern for change.

The conservator as agent acts on behalf of the principal. The principal delegates authority to its agent who, in turn, is responsible for preserving the authority to act within a specific realm of social action and to pursue specific policy objectives. This presumes, however, that the principal is

able to control agents who may act on the basis of their own self-interest. To conserve mission, asserts Terry, the conservator must preserve both executive and non-executive authority.[30]

Authority, posits Terry, subsumes several other concepts: power, reason, legitimacy, obedience, consent, advice, and command. Authority can be vested in a person by virtue of his knowledge, position, or competency within a particular field. However, authority must be justified and recognized as legitimate if it is to be accepted by those who are subject to it.[31]

Terry relies heavily on DeGeorge to explain the notion of authority. According to DeGeorge, authority involves some type of relational quality, and it is limited to a particular realm or context. Moreover, he distinguishes between two types of authority: *executive* and *non-executive* authority (authority based on expertise in a particular field) vested in public bureaucracies. Executive authority, explains DeGeorge, encompasses the right and power to issue commands as well as to perform specific acts, but it must be linked to some system or context, such as that established by a constitution, a position, a set of laws or even a set of personal qualities that are appropriate for a set of circumstances. An executive authority is someone who has the power and right to act for and on someone else as well as to

perform specific acts. A non-executive authority lacks this right or power.[32]

Further, DeGeorge argues that the nature of executive authority suggests that it must be linked to some system or context in order to make any sense. The particular context or system may be established by tradition, a set of laws, a position, or a set of personal qualities that are appropriate for a particular set of circumstances. Specific rules or procedural rules govern the system or context and, in turn, establish the scope and limits of executive authority.[33]

DeGeorge divides non-executive authority into two distinct types: epistemic and competence. Epistemic authority is based on superior knowledge in a particular discipline or area; it is considered to be "legitimate" if what someone says is believed and, therefore, accepted by those for whom that person is an authority. Authority based on competence is closely related to epistemic authority, but unlike the latter, competence authority is based on the ability of an official to perform certain tasks within a particular field or area. And because public administrators are entrusted with the responsibility of preserving the authority of public bureaucracies, administrative conservators should preserve both executive and non-executive authority as a means of conserving the missions of administrative agencies and their capacity to act.[34]

In order to preserve executive authority, the conservator must act to ensure that the agency's actions and activities do not violate the spirit or letter of the law. Clearly some institutions are more likely than others to experience such violations. Depending on the situation, one strategy may be more useful than another. Important strategies include: the responsible interpretation of legal mandates, the education of personnel, and the judicious use of rule making and adjudication. Key strategies used by the conservator to preserve executive authority by being responsive to elected political officials and the public include: the exercise of strategic discretion and the protection of jurisdictional boundaries.[35]

Boundaries that define an agency's jurisdiction are not usually clearly demarcated. Instead, they tend to be penetrable and/or constantly changing. Nevertheless, asserts Terry, the conservator should be aware of the agency's boundaries and be prepared to vigorously defend them against encroachment by bureaucratic rivals. Defending one's boundaries may be achieved, observes Terry, by developing and maintaining a high degree of agency autonomy.[36] The meaning of autonomy is contextual; that is, the condition of independence (or self-rule) is conditioned by the <u>context</u> - autonomy affords administrators flexibility, the opportunity to choose.[37]

Relying primarily on the work of J.Q. Wilson, Terry identifies the strategies that a conservator should use to achieve agency autonomy. First, the administrative conservator should fight any organization that attempts to perform his agency's tasks. Second, the conservator should scrupulously avoid taking on any task that differs significantly from those that lie at the heart of the organization's mission. Third, the conservator should never involve himself/herself in joint or cooperative ventures unless such arrangements protect or strengthen the agency's autonomy. Fourth, the conservator should avoid, when possible, those tasks that will result in divided or hostile constituencies. For example, a conservator should not pursue tasks that will bring with them a new set of stakeholders, each with a different agenda. Wilson explains that any ground rules established by a particular agency to handle agreements or disagreements, with its traditional constituencies, may not be honoured by a new stakeholder or stakeholders. Loss of agency autonomy due to the inability of an administrator to protect jurisdictional boundaries from encroachment can reduce an agency's executive authority.[38]

Non-executive authority (competence and epistemic) does not involve any right to command or to act for or on another. Using Carl Friedrich' s work, Terry explains that preserving non-executive authority is necessary to prevent a legitimacy crisis: the loss of public confidence, faith, and trust in an

agency's ability to perform the functions for which it was created.[39] To counteract a potential legitimacy crisis, the conservator must guard against violations of the public trust, such as deliberate deception. An important strategy for countering deliberate deception, by garnering the public's trust, involves the dissemination of official reports documenting the agency's activities and accomplishments, provided of course that the information contained in such reports is accurate and meaningful (to those who will read such reports).

A favourable public image may be transformed into prestige, a viable strategy for controlling external dependencies and for legitimising an agency's activities. The dissemination of official documents to stakeholders may engender confidence in them that the agencies activities are indeed legitimate and worthy of continued support.[40]

The conservator must also be on constant alert for any abuses that could undermine epistemic authority, especially malpractice: abuses that involve an official's use of specialized knowledge and competence (acquired largely as a result of or directly related to a formal position) for personal gain. But the term "malpractice", as Terry uses it, differs from ordinary usage. In common parlance, malpractice means failure to exercise an acceptable degree of professional skill (or learning) by the individual rendering a professional service that results in injury, loss, or

damage.[41] Terry's use of the term malpractice is derived from *The Compact Oxford English Dictionary*. Accordingly, malpractice is: "illegal action by which a person seeks to benefit at the cost of others while in a position of trust."[42] Though Terry relies on this definition of malpractice, he concedes that a few modifications are necessary. For instance, malpractice may not involve illegal acts when loopholes exist in a law. While these loopholes might not violate the letter of the law, they may violate the spirit of the law. Thus, an individual's authority on behalf of an agency can be undermined when his actions are perceived to be suspicious and raise questions.[43]

For the purpose of this study, *conserving mission* is defined as that function performed by the conservator to ensure that the institution's overall purpose is preserved in the face of changing circumstances.

Conserving values. Conserving values is necessary, asserts Terry, to protect and preserve core institutional values that establish an organization's distinctive competence and role. And, clearly, such values are central to mission. But, Terry rejects the larger-than-life view that administrative leaders alone possess the power, intellectual ability, and skills to conserve values. Conservators should realize that the responsibility for conserving values has to be shared. Drawing on the work of Selznick, Terry concludes that the task of conserving values should properly be shared

with the conservator's *executive cadre* or administrative team. This is because the members of the executive cadre have an important role to play in preserving institutional integrity. According to Selznick, each member of the cadre is actually a "custodian of policy"; he or she is responsible (morally obligated) for the "persistence of an organization's distinctive values, competence, and role"[44] Further, members of the executive cadre should possess the requisite expertise and skills needed to transmit (indoctrinate) core institutional values to others (through interpersonal contacts, for example), especially newcomers. The involvement of the executive cadre in the indoctrination process is especially important, suggests Selznick, because the team "can provide assurance that decision making will conform, in spirit, as well as letter, to the policies that may have to be formulated abstractly and vaguely."[45]

Because the role of protecting the values of public bureaucracies is so important, the administrative conservator should concentrate on the task of maintaining a viable executive cadre. The term *viable,* as Terry uses it, actually refers to the cadre's capacity to protect the values of public bureaucracies from corruption. To maintain a viable cadre, the conservator must devote special attention to maintaining the commitment of cadre members to core institutional values, and also ensure that the cadre is appropriately composed in terms of skills and perspectives.[46]

And because there is so much at stake, Terry advises that the conservator should explore new ways to build and maintain commitment among the executive cadre to larger institutional aims.[47] Though scholars have identified many useful strategies, Terry focuses on three. Presumably, each has special significance for building and maintaining commitment among the executive cadre to larger institutional aims.

The first strategy, *using inducements and persuasion,* was given intellectual currency by Chester Barnard (1938) in his seminal work: The Functions of the Executive. Terry makes no attempt to extend Barnard's theory, choosing instead to rely on Barnard's original work for guidance.

Specific inducements, explains Terry, was the term Barnard attached to those inducements addressed to the individual, such as money, and opportunities for acquiring power and prestige, whereas general inducements include the provision of opportunities for social compatibility and friendship.[48]

The second type of persuasion is rationalization of opportunity. Terry explains that Barnard separates this mode of persuasion into two types: specific and general. Specific rationalizations are designed to persuade members that cooperating is in their best interest. General rationalizations appeal to higher ideals embodied in religious or political doctrines.[49]

The third type of persuasion cited by Barnard is inculcation of motives. This type involves the indoctrination of administrative team members with those behaviours the conservator deems to be desirable. Indoctrination is usually accomplished through the medium of education, propaganda or both.[50]

The second of the three strategies is *minimizing dissension within the executive cadre*. In order to secure the commitment of administrative team members to core institutional values, the conservator must minimize, but not exclude entirely, dissension within the administrative team.[51] Strategies that a conservator can use to combat unhealthy competition among team members include attempting to cultivate a sense of pride in the agency and in its aims and aspirations, and according members who exhibit cooperative behaviours public recognition at staff meetings, at formal ceremonies, or in agency publications. But the conservator can also withhold praise as a means of expressing dissatisfaction when team members do not exhibit cooperative behaviours. Similarly, lack of communication or silence on the part of the conservator may be more effective as a means of modifying behaviour than taking members to task.[52]

Because there are trade-offs in using different strategies, the conservator should not only know what strategies to use, but also when to use them. Moreover, the blind application of strategies governed either by the value of equity (for

example, severe budgetary cuts that damage long-term capabilities of the organization) or efficiency (assigning pay cuts to individuals and units in the organization to minimize long-term loss) further erodes institutional integrity and can destroy the executive cadre's faith in the agency's abilities.[53]

The third and final strategy is *building and maintaining trust*. Presumably, Terry would agree that team-building and even conflict resolution might also be included among the conservator's strategies. Building on the work of Kaufman, Terry argues that the conservator should constantly strive to foster and maintain a trusting relationship with members of the administrative team.[54] A trusting relationship is necessary if the conservator and the administrative team are to work cooperatively to preserve the values of public bureaucracies.[55] To cultivate and maintain a trusting relationship with cadre members, Terry recommends three tactics. First, the conservator should honour both formal and informal commitments made with team members. Keeping one's word on a consistent basis serves to reinforce members' confidence that the conservator can be trusted which, in turn, reinforces cooperation.[56]

Second, the conservator should assume causes that are important to team members. When leaders are perceived as willing to fight for something the administrative team values, it constitutes a powerful symbolic act of

demonstrated unity with the team and instils a sense of confidence in the conservator.[57]

Third, the conservator should support the decisions and actions of cadre members when called on to do so. Two instances warrant the conservator's support: when the decision of a team member is questioned by an individual or group adversely affected by it, and during an organizational crisis. With regard to the first instance, if team members' decisions are consistently overturned because of stylistic rather than substantive concerns, team members are likely to feel that their authority has been undermined. Such feelings, admonishes Terry, breed resentment and ultimately, distrust.[58]

With regard to the second instance, conservators should always give team members the benefit of the doubt. When the facts are known, the conservator can act decisively, but to act when all of the facts are not known, asserts Terry, endangers institutional integrity.[59]

In addition to building and maintaining commitment among cadre members to larger institutional aims, Terry emphasizes the role of the conservator in strengthening the executive cadre's capacity to protect core organizational goals. This might be accomplished, he suggests, by ensuring that the cadre is *appropriately composed*. Citing numerous scholars (Barnard, 1938, Walmsley & Zald, 1976, Seidman, 1980, and

Schein, 1985), Terry explains that the phrase "appropriately composed" refers to the suitability of the cadre's structure as measured by the commonality and complementary character of skills, attitudes, and behaviours required to preserve institutional integrity. An appropriately composed team is a cohesive and cooperative unit that shares a particular vision or perspective with the conservator. In fact, Terry is talking about the "process" of creating and maintaining a *viable* administrative team (the team is appropriately composed in terms of skills, attitudes, and behaviours needed to preserve institutional integrity).[60] According to Terry, there are four steps to ensuring that the executive cadre is appropriately composed.

First, the conservator should make certain that the composition of the team is appropriate for the institutional level of organizational action or *field of action*. The term *field of action* refers to an area or sphere of action, such as education, law or medicine. Hence, the composition of the administrative team must reflect the agency's values and field of action. Ideally, observes Terry, the administrative team ought to be composed of individuals whose skills and perspectives are tailored to agency functions and values.[61]

Second, the conservator should ensure that the composition of the executive cadre remains well suited to the dominant core technology employed by the agency. The type of technology employed by the agency has an influence on the type of skills

and perspectives needed within the cadre. Hence, the conservator should make sure that members of the cadre possess the appropriate level of skills for specific technologies operated by the agency. In order to protect core organizational values, the conservator must ensure that the skills and perspectives of the administrative team are well suited for an agency's current or new stage of historical development.[62]

Third, the conservator should ensure that the executive cadre is well suited to cope with developmental problems facing the agency. Some problems may be highly technical in nature and others less so. Nevertheless, each problem requires attention from a member with an appropriate level of related skills.[63]

Fourth, the conservator should make certain that the executive cadre's demographic composition is appropriate for the institutional level of action. Citing Thompson, Terry, notes that there are three different levels of organizational action: technical, managerial, and institutional. The technical level is the setting for the agency's production systems. As such, efficient operation of all technical functions is of primary importance. Thus, specialized expertise is needed at this level. The managerial level performs a service function for the technical level; this function involves the acquisition of essential resources to ensure the efficient operation of technical functions (teaching or curriculum development, for example) as well as

mediating between users (students, for example) of the agency's products and the technical operation of the organization. The third level, institutional, focuses on the overall direction and legitimacy of the agency.[64] The conservator's actions at this level are marked by a concern for the evolution of the organization as a whole, including its changing aims and capabilities. In order to preserve the integrity of public bureaucracies, suggests Terry, the administrative conservator must be willing (and able) to monitor and adjust the executive team's composition (on a continuous basis) to ensure its viability by making necessary adjustments.[65] One might speculate, therefore, that conservators must possess an accurate sense of changes in the environment in order to adjust their cadres' composition appropriately.

For the purpose of this study, *conserving values* is defined as that function that requires the conservator to protect the agency's goals and values as well as to transmit them to new generations of agency members. We turn now to the examination of the last of the three critical functions, conserving support.

Conserving support. Conservators must give their undivided attention to building and maintaining support (resources acquired from internal and external stakeholders) for their agencies' programs and activities. Relying mainly on the work of Charles Perrow, Terry argues that creating and

maintaining a favourable public image is especially crucial for the success of public bureaucracies. And, according to Perrow a favourable public image translates into prestige, which, in turn, strengthens the agency's relationship with key constituents/supporters who supply the agency with essential resources. A favourable public image affects the agency's reputation (a general estimation in which a person or an entity is held by the public) for consistent compliance with standards used to measure the intrinsic characteristics of the product or service. Extrinsic prestige has to do with the type and quality of publicity generated by an agency or the physical quality of an agency's buildings.[66]

In addition, Perrow contends that organizations may use indirect indexes to cultivate and maintain organizational prestige. The use of indirect indexes involves the publication of certain organizational characteristics, in official documents for public consumption, which are thought to ensure quality. Terry points out that Perrow's construct of prestige (based on intrinsic and extrinsic characteristics) affords valuable insights into how the conservator might maintain a favourable public image. Such maintenance, however, requires that the conservator protect his agency's reputation for consistent compliance with standards used to measure the intrinsic quality of its products and services, and ensure that indirect indexes of

quality contained in official documents remain accurate and meaningful.[67]

Complying with established standards, asserts Terry, ensures accuracy and thus favourable evaluations on the intrinsic quality of the agency's product. The judgment and opinions of an agency's key constituents are influenced by the consistent quality of its products or services over time. Thus, it is the perception of consistency, or lack thereof, explains Terry, that determines an agency's reputation and thus contributes to its public image. The failure of an agency to receive favourable evaluations on a consistent basis invariably results in a poor or bad reputation and even the withdrawal of support by the agency's key supporters.[68]

Presumably, Terry would agree with the proposition that pursuing and achieving certain organizational goals also garners prestige. Hence, consistency is not the only component of successful performance, especially in a large urban school system where goals are often vague, shifting, and even conflicting. Perhaps it is just as important (or even more important) to be seen by supporters as working tirelessly towards the achievement of certain distant but as yet "unattainable" goals, as well as those that are attainable.

Strategies to ensure compliance with established standards range from strategic planning to the periodic detailed

inspections of agency activities. An especially important strategy for ensuring compliance with established standards is the timely adoption of innovations when the need arises. Any innovation should not be seen as delayed by the public, and the update of operations should occur at a scheduled or appropriate pace.

However, the premature adoption of an innovation is to be avoided, because it could result in the incorporation of programs, policies, processes, and technologies that do not add much to an agency's performance, or that detract from an agency's performance as well as its reputation. Once an innovation is in place, it constrains the agency in terms of pursuing future courses of action. Adopting an innovation intended to convey a perception of modern technological development (computers, for example) that turns out to be premature conveys the image that the organization, as well as its equipment, is outdated. In short, timing is everything.[69]

Two major occurrences can trigger the need to upgrade agency operations: recognition of emerging trends and reaction to major events. The conservator should establish functions and processes to identify and monitor trends and events that could impinge on the agency's operations. However, Terry does not specify a particular process or function that might facilitate this obviously important purpose. At the same time, the conservator should be sensitive to any event that might affect the agency's operations, such as changes in

legal mandates, disaster or tragedy, or even unfavourable evaluations by the press. In other words, the conservator must acquire adequate knowledge of when and how to improve an agency's operations. Presumably, Terry would agree that the conservator might pay more attention to what other agencies were doing, or he might search for innovative ideas in different journals and related publications. Clearly, the process of improving an agency's operations is complex and may be highly dependent on appropriations from external supporters. While adequate or specialized knowledge of when to upgrade is necessary, securing the support needed to do so is also a critical aspect of the modernizing process. Basically, Terry is saying that the conservator must possess the requisite skills needed to modernize and, in addition, the capacity to influence key supporters to provide the resources to do so.[70] Does this mean, however, that the conservator must be in possession of such skills before his leadership appointment, or after? Can such skills be easily learned?

Maintaining accuracy of indirect indexes of quality (performance information) is also necessary to sustain the agency's favourable public image. Indirect indicators contained in official documents released to the public must be meaningful and accurate. The accuracy of an indicator is measured by the degree to which it conforms to the truth, the reality that exists within the agency. But, as Terry

cautions, an indirect index is only considered meaningful when it has significance and importance in a specific institutional context.[71]

Including indirect indicators in documents that publicize the quality of an agency's programs and services is an effective way to promote a particular agency. Such indicators must be consistently accurate and meaningful if they are to be believed and, thus, useful in an agency's propaganda efforts. In order to guarantee that information prepared for public consumption is accurate and meaningful, rather than misleading or questionable, the conservator should constantly monitor, inspect, and evaluate such information before it is disseminated to the public. Failure to so, admonishes Terry, may result in a credibility gap that could severely damage the agency's favourable public image.[72]

Citing the work of Francis Rourke, Terry explains that the administrative conservator should cultivate and strengthen supportive relationships among an alliance of key supporters who will take action on behalf of the agency. This alliance typically consists of a multitude of actors, both inside and outside the agency, who are affected by or have an interest in the agency's activities.[73]

According to Rourke, expectations (explicit or implicit) of parties involved with a public agency govern the exchange relationship and define appropriate behaviour. In exchange

for support, the conservator should provide inducements and appropriate rewards. Such rewards, however, must not exceed the legitimate and legal scope of the agency's activities. Hence, the conservator must exercise considerable discretion in dispensing benefits in a manner that does not compromise the favourable public image of the agency, especially in regards to direct or indirect expressions of approval, such as formal recognition, public pronouncements, or agreeing to sit on a supporter's board of directors.[74]

Quoting Selznick, Terry argues that the administrative conservator must "bind parochial group egotism to larger loyalties and aspirations".[75] Terry makes the point that it is the responsibility of the conservator to build and sustain commitment among internal interest groups to core agency values. Different strategies may be used for this purpose of which the most effective is "co-optation".

Co-optation, as defined by Selznick, is the process of absorbing new elements into the leadership or policy determining structure as a means of averting threats to an agency's stability or existence.[76] The success of co-optation is contingent on the ability of the conservator to integrate groups into the policy-determining structure. Formal co-optation involves the integration of groups into the leadership structure to acquire legitimacy and respectability. For example, inviting a well organized parent group to participate in a school division's decision-making

process may serve to legitimate, support, and even restore the public's trust and confidence in the school division's formal authority.[77]

Informal co-optation has little to do with legitimacy; it is undertaken in response to demands for sharing power. For example, a school division might incorporate more women into the leadership or policy-making structure of the division in response to pressure from organized women's groups. Terry points out that "Co-optation is considered informal when formal authority never publicly acknowledges the concessions that have been made to share power in response to pressure."[78] However, the intended advantages of informal co-optation (internal security, stability, and broader administrative discretion) are not guaranteed.[79]

To avoid the disaffection of co-opted groups (and potentially a serious disruption of the agency's stability) and to sustain their continued support, the conservator should ensure that co-opted groups are the periodic recipients of an equitable share of benefits (services, resources, information, for example). The term "equitable," explains Terry, does not refer to the distribution of resources but rather to the quality and quantity of benefits accumulated over time.

Quantity has to do with the number of benefits accumulated during a specific period, whereas the quality of benefits has

to do with the degree of "organizational slack." Organizational slack, explains Terry, originated with March and Simon[80] and "refers to the extent to which the agency has an abundance or excess of resources to achieve a minimal level of effectiveness."[81] Having a large degree of slack increases the opportunities for the acquisition of resources, making their acquisition less valuable to the recipient. Having less slack results in tighter restrictions on the allocation of organizational resources, making the benefits to the co-opted seem more valuable.[82]

Essentially, Terry is saying that the quality of a benefit is measured by the scarcity of critical resources. One might interpret this to mean that when resources are scarce, an agency is more likely to offer perceived quality benefits to the co-opted; however, when its resources are abundant or in excess the agency is less likely to offer perceived quality benefits to the co-opted. But, how does the conservator ensure that co-opted groups receive an equitable share of benefits?

The answer to this question, asserts Terry, is twofold. First, the conservator must be aware of who is getting what in the allocation of benefits through the decision-making structure. Accordingly, the conservator should pay particular attention to the quantity and quality of benefits received by the various co-opted groups over time. Second, the conservator should exercise control over the decision-making

process periodically to ensure that each co-opted group receives an equitable share of benefits, awards, services or favours. This may be achieved, suggests Terry, by influencing the choice of criteria (gender, race, location, tenure, occupation, for example) on which decisions are based.[83]

However, Terry does not say how the conservator might prevent the absorption of adversarial elements into an agency's decision-making structure, especially groups that are in a position to enforce their demands. Such groups can effectively prevent the co-optation of important rival groups, undermine pre-existing alliances, and even damage the agency. Selznick first observed this phenomenon in 1949 when he studied the Tennessee Valley Authority (TVA).

In his study, Selznick found that the TVA engaged in co-optation processes to avert threats to its viability. The TVA operated in a decentralized fashion, involving local organizations and groups in decisions. This gained support for the TVA but also imposed strong values and priorities on the TVA. Because of this, the newly co-opted elements were able to shut out rival elements, putting the TVA into conflict with other New Deal programs with which it should have allied.[84] The hard lesson to be learned here, then, is that the *capture* of an agency by a "constituency" can damage the agency by altering its primary goals and values. Such damage can also undermine institutional integrity.

For the purpose of this study, *conserving support* is defined as that function requiring the administrative conservator to build and maintain support for an agency's programs and activities (support ranges from financial and human resources to social legitimacy) both externally from the public and other constituents, and internally from those who are members of the institution.

Having examined the critical elements of Terry's model, we turn now to the task of establishing the status of his model in the leadership literature, based on the comments, observations, and concerns of those scholars who have examined his model.

Status of the Model in the Literature

The comments and concerns of the scholars noted below were gleaned from three critical reviews of Terry's work. Two of these were American (D'Aunno and Stever), and the third was Autralian (Hede).

To start, Terry's use of the concept of "institution" was troublesome for some reviewers of his work. Thomas D'Aunno concluded that the major weakness in Terry's model was that he did not draw sufficiently on the relevant sociological and management literature.[85] D'Aunno suggests that Terry's argument for differentiating between an organization (a rational, means-oriented instrument guided by the "cult of efficiency; efficiency is the primary determinant of

survival) and an institution (a creation of social needs and aspirations; it is an adaptive, responsive, cooperative system that embodies cultural values) would have benefited from the literature on "new" or neo-institutionalism.[86] But, what is the "new" institutionalism, and how might its use have benefited Terry?

Rowan and Miskel explain that "new" institutionalism draws from three disciplines: economics, political science, and sociology. New institutionalism reflects a desire to abandon models of social and organizational action in which autonomous actors are operating with unbounded rationality in order to pursue their self-interests. Thus, new institutionalism sees social action of all sorts - individuals, managers, interest groups, public agencies, and corporations - as embedded in socially-organized environments that generate rules, regulations, norms, and definitions of the situation that constrain and shape action.[87] The concept of "environment" requires some explanation.

Daft offers this overview of the critical elements of the institutional environment/context in which schools typically find themselves. School administrators' and, indeed, school superintendents' values and behaviour are shaped and conditioned by the constraints and opportunities represented by the institutional context. The following elements have relevance for school systems:

a) The pool of human resources which personnel are

drawn from;

b) The market for services provided by the organization;
c) The availability of financing for the organization's initiatives;
d) New technologies in the environment that may threaten the need for the services provided by the organization;
e) Economic conditions that influence the volume of business, or that support production;
f) Governments and the nature of their policies and regulations; and
g) Socio-cultural conditions such as social value systems and demographics (shifts in size of the school age population).[88]

Clearly, other elements ought to be included in Daft's set of critical elements, such as the political circumstances at work in the environment.

According to Rowan and Miskel an "institution" is a set of more or less agreed-upon rules that carries meaning for and shapes the actions of some population of actors (teachers, for example). An action or sequence of actions and interactions is "institutionalised" when it recurs repetitively without any overt intervention, or when a pattern of social action reproduces itself according to some orderly set of rules.[89]

In other words, new institutionalism holds that in some institutional environments (those with well-understood technical rules), pressures for institutional conformity can also be efficiency enhancing. In such environments, conformity to institutionalised rules does not conflict with organizational efficiency. And in such environments, survival does not depend on legitimacy at the expense of organizational efficiency. In fact, increased pressure to

conform enhances efficiency.[90] Thus, D'Aunno was probably suggesting that Terry's work would have benefited from the new institutionalism, because legitimacy is not sacrificed at the expense of efficiency. Further, the usefulness of neo-institutionalism would be to highlight the two-way flow of influence between leaders and institutional values. Also, neo-institutional approaches emphasize the central purpose of organizations. Terry might have availed himself of the literature on neo-institutionalism which would have extended his argument and made it even stronger.

Terry chose Selznick's definition of institution (institutions represent the ethos or belief system of the culture, its particular way of self-fulfilment[91]), because it offers "an alternative to the rationalist school of organization theory that embraced efficiency as its dominant value."[92] Terry is not saying, however, that efficiency is not valued; rather, self-interest is not the force behind the need to be efficient. Proponents of neo-institutionalism would agree with Terry.

In their own work, Rowan and Miskel found that concerted institution-building over the last thirty years in the United States by the education professions, government agencies and private sector organizations has resulted in a "more elaborate technical environment for schooling, one that includes not only an increasingly sophisticated theory of educational productivity, but also the technical capacity to

inspect instructional outcomes in schools."[93] The result has been, of course, that schools now face much stronger demands for technical performance than they did in the past, but without experiencing a decline in demands for institutional conformity.[94]

Stever suggests that Terry chose Selznick's definition not only because it afforded him a definition that served his purpose, but because he has rejected modern organizational theory - "but not the necessity of maintaining viable organizations within complex technical societies."[95] One has to wonder, however, if Stever is correct in his analysis, because his second comment suggests that Terry's conservator does in fact respond to the increased demands for technical performance, as established in the neo-institutionalism literature. Stever also observes that Terry does not mention *culture* - even though it is a powerful carrier of institutionalisation.[96]

In fact, Terry does talk about the important role of the conservator in preserving and strengthening cultural values, but not in shaping them. According to Terry, the strength of cultural values is contingent on the capacity of primary institutions to transmit them in a pure form. Thus, the perpetuation of cultural values depends on the security (stability, strength, and overall integrity) of key institutions.[97] However, one is inclined to agree with Stever's observation that, it is hard to imagine that Terry's

conservator does not shape cultural values, because conserving leaders necessarily build strong collaborative cultures to complement mission.[98]

Further to Stever's point, Terry may have excluded any mention of the leader's traditional role in shaping cultural values because he wanted culture to be seen as part of the justification of moral purpose rather than as a mere instrument for the achievement of efficiency. This view reflects what Selznick called 'the institutional embodiment of purpose'.[99]

Andrew Hede of Sunshine Coast University, Australia is especially critical of Terry's model. Hede, like D'Aunno is troubled by Terry's decision to not take advantage of the literature on organizational leadership except for a review of 1920s scientific management and a passing reference to 1980s transformational leadership. Hede observes that Terry relates his model to some public administration writings (mainly Selznick, 1957 and Friedrich, 1961) and deliberately ignores others (by "others" Hede may be referring to non-American sources of public administration literature).[100]

The first major problem with Terry's model, asserts Hede, is whether it extends beyond the American system. Hede observes that Terry focuses exclusively on American bureaucratic institutions, and makes no attempt to consider whether his theory might apply to other western democracies. As far as

Hede is concerned, the challenge for Australian scholars will be to ignore the "myopia" Terry displays and to overlook his failure to address current managerial issues. Thus in its present configuration, asserts Hede, Terry's model has little to offer that is relevant to public administration in Australia.[101]

Hede is, of course, correct when he asserts that Terry makes no attempt to apply his theoretical model to other western democracies. Yet, countries such as Canada, New Zealand, and the United Kingdom have also been struggling with the question of the appropriate role for senior public servants in modern public bureaucracies. In all these countries reformers have tried to address the tensions between traditional values and managerial efficiency, career service and performance contracts, policy-making and service delivery, impartiality, and responsiveness, and independence versus accountability. So, in this respect all Anglo-American systems of governance including the United States face similar issues when defining the leadership role of senior public servants.[102]

Terry's model is unapologetically American in design and purpose. As such, Thomas D'Aunno (an associate professor of Social Service at the University of Chicago), and James Stever (a professor at the University of Cincinnati) may have been somewhat less critical of Terry's model than Hede. D'Aunno, for example, concludes that Terry's "analysis offers

many useful prescriptions that, if pursued, could improve the management and governance of public bureaucracies."[103]

On the other hand, D'Aunno is critical of Terry's decision and/or oversight not to include an overarching conceptual framework in his model with which to view the salient issues related to conservatorship. Without an overarching framework, contends D'Aunno, the behaviour of the conservator begins to resemble nothing more than a guide to effective bureaucratic leadership, rather than conservatorship.[104]

Stever would agree with D'Aunno that Terry's model is somewhat flawed. But Stever is also quick to point out that Terry's theory is a legitimate response to the most pervasive scholarly question within public administration: Is bureaucracy compatible with democracy? Stever writes of Terry's model: "His administrative ***conservator*** approach is a credible, creative way to ensure that bureaucracy is reconciled with democracy."[105] This interpretation also suggests that Terry was at least as interested in prescription as in analysis.

We cannot say for sure that Terry did not consider the application of his model to Anglo-American systems of governance. However, "the principle of parsimony" or *Ockham's Razor* ("don't make things more complicated than they need to be.") might have guided Terry's hand as he constructed his model. Moreover, as R. Russell Bernard observes in his book

Research Methods in Anthropology: Qualitative and Quantitative Approaches (Second Edition, 1994): "Many theories are developed to explain a purely local phenomenon and then turn out to have wider applicability."[106]

The second major problem with the administrative conservatorship model, observes Hede, is that it gives senior bureaucrats more power (authority) "than many theorists and politicians would be comfortable with....it is a radical theory in today's climate of 'post-managerialism' which generally still seeks to limit the power and policy role of public executives."[107] In fact, Terry's model seeks to limit the power (and entrepreneurship) of senior bureaucrats, whereas critics (Ronald Moe, 1994; Diver, 1982; and Reich, 1990) charge that public entrepreneurs of the neo-managerialist persuasion are obsessed with an anti-traditionalist orientation, self-promotion, rule-breaking, power politics, risk-taking and radical change that conflicts with democratic theory[108].

Terry concedes that his model is not perfect, because "it is virtually impossible to ensure that *all* career civil servants will *always* act with the public good in mind."[109] Not all conservators possess high moral character, in equal amounts, either. What Terry seems to be looking for, asserts Stever,

> are scrupulous leaders who build their institutions consistent with tradition and the Constitution. He believes that tradition-bound/Constitution-bound bureaucracies stand a better chance of gaining status in society now intent on downsizing government.[110]

Finding "scrupulous" bureaucrats to populate America's public agencies is one thing, and ensuring that they remain "scrupulous" is quite another thing altogether. Moreover, some administrative theorists insist that the agent will deviate from adhering to the objectives of the principle eventually. Thus, Hede may be thinking that overly powerful bureaucratic leaders are likely to cause institutions to run amuck sooner, as opposed to later. To allay such concerns, Terry cites the work of Guy Peters to show that the safeguards built in to the presidential-congressional system of government are, collectively, sufficient to control the activities of public sector leaders. These safeguards or "instruments of accountability," include control by political institutions (legislative, executive, and judicial); normative restraints; pressure group activity, and scrutiny by the press.[111]

The "public choice" school of thought, like Hede, holds that mechanisms must be found to reassert the primacy of the elected politician over the bureaucrat with respect to both budgets and policy.[112] Proponents of public choice focus on the need to re-establish the primacy of the representative government over bureaucracy, which has had a profound impact on the use of certain mechanisms to control bureaucracies. Chief among mechanisms to control bureaucracies has been the increased "politicisation" in staffing those positions that serve the executive, collectively and individually. In some

cases this has meant the proliferation of partisan appointments to support staff positions or even line positions; in others, observes Aucoin, it has meant the promotion of career public servants who have demonstrated partisan attachments to the governing political elite or failing that, sympathies to their policies or approaches.[113]

Efforts have also been made to reduce the total size of government bureaucracies, and to reduce the powers and autonomy of bureaucratic leaders by minimizing the complexities of government departments and agencies. These efforts have also been linked with schemes to privatise some government initiatives, to deregulate others, and to contract-out other undertakings to private sector agencies (or perhaps to lower orders of government). As Aucoin observes, all of these mechanisms "have the advantage of diminishing the need for bureaucrats or, at least, public employees (if only in reducing government)."[114]

However, Aucoin also makes a telling observation about the issue of administrative reform in public management. He observes that government bureaucrats are prone to be seen by their clients as unresponsive to them or to be seen by elected political officials as captured by their clients. "Since it is virtually impossible," writes Aucoin, "to verify either case by empirical measures, both sides can make their claims to suit their purposes. The losers in this tug-of-war cannot be other than the bureaucrats."[115] At the very least,

Terry's model affords a useful counterpoint to the argument by the "reinventing government" promoters who suggest that public sector institutions that cannot change quickly enough are doomed to failure. As Thomas suggests, "the presence of a voice favoring caution and incrementalism is a valuable perspective in the "strategic conversations" held between politicians and their public service advisers."[116]

To conclude, it can be said that conservatorship is not a "new" model in the sense that it offers a new orientation to change for public sector leaders. What distinguishes Terry's model from other models is that he has taken the older, classical idealist conception of leadership - defining an organization's mission and values meant shaping its enduring institutional character - and has made it serve a new purpose.

The Justification for Using the Model

Having established the status of Terry's model in the literature, it is appropriate at this juncture to offer an explanation as to why Terry's conception of administrative leadership is applicable to the leadership performance of Dr. W.C. Lorimer, formerly the superintendent and chief executive officer of The Winnipeg School Division No.1 in the province of Manitoba, Canada.

The assumption advanced here is that it is plausible to argue that Lorimer's behavioural pattern as superintendent of Winnipeg No.1 is consonant with the pattern of leadership

behaviour attributed to the conservator by Terry, to preserve institutional integrity. To the best of the writer's knowledge, Terry's model has not been applied to the leadership of a superintendent of a Canadian public school system. Yet the superintendent reports to an elected school board, directs the operation of a substantive and complex bureaucracy, and works in a social service (public education) that is heavily influenced by legal statutes enacted by a provincial legislature. It would seem, therefore, that there are key concepts in the Terry model that if applied to the case of a Canadian school superintendent will throw additional light on our understanding of educational leadership.

Restatement of Purpose

Having reviewed the related literature, the main research question may now be restated.

1. As a result of Dr. Lorimer's leadership was the mission of The Winnipeg School Division No.1 conserved?
2. As a result of Dr. Lorimer's leadership were the values of The Winnipeg School Division No.1 conserved?
3. As a result of Dr. Lorimer's leadership were supports conserved and/or given to The Winnipeg School Division No.1.

Terry maintains that the enduring motivation behind the critical functions performed by the conservator is to preserve institutional integrity. If it can be shown that Lorimer performed each of the three functions successfully,

one might reasonably conclude that the primary motivation behind his actions was to preserve institutional integrity.

Conclusion

Terry set a very difficult-to-achieve goal in his attempt to advance a "new" theory of administrative leadership. The real question we should be asking, then, is not whether he succeeded, but, rather, what new perspective on what should be the focus of leaders' attention does Terry's model offer in terms of conceptualising leadership?

Terry's model came into being as a response to the call in the literature on "New Public Management" for more visionary, entrepreneurial and risk-taking leadership in the public sector. Terry's perspective is "new" in that it seeks to legitimate the exercise of executive-level and institutional bureaucratic leadership and to reconcile it with democratic governance. Viewed in this light, conservatorship is a valid alternative to those who think that executive bureaucrats should exercise more leadership in governance. At the same time, conservatorship sheds some much-needed light on the exercise of public sector leadership that should allay the concerns of scholars from the legal, political science, and public administration fields who are worried that leaders of public bureaucracies are not effective because they are either too passive or too aggressive.

Terry's model was selected for this particular study because it facilitates an examination of the leadership of the so-called non-heroic leaders, Dr. Lorimer for instance. At the same time, Terry's model provides a better understanding of how real-life top civil servants, embedded in real-life situations, went about their administrative roles in different circumstances, how these circumstances shaped their leadership, what their achievements were, and whether or not their leadership mattered. The contextual circumstances of primary importance to Dr. Lorimer's leadership are examined in the next chapter.

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CHAPTER 3

CONTEXTUAL CIRCUMSTANCES OF THE WINNIPEG SCHOOL DIVISION NO.1: 1949 TO 1966

The purpose of this chapter is to identify and describe the demographic, institutional, socio-cultural, economic, and political circumstances challenging the integrity of The School Division of Winnipeg No.1 during the incumbency period of Dr. Wesley C. Lorimer's leadership career. The specific actions he took with respect to the circumstances identified in this chapter will be examined in chapter 4.

In 1949, Lorimer arrived in the School District of Winnipeg No.1 to fill the position of Director of Research and Personnel. This position emerged out of a recommendation made by David Orlikow, a School Trustee of Winnipeg No.1 in 1946. The Minutes of the regularly scheduled Board meeting of February 19, 1946 show that Orlikow moved that

> Whereas our school system is becoming so complex that constant research is needed to keep abreast of modern practices and developments,
> And, whereas there is a need for definite organization and co-ordinations of counseling services,
> Therefore be it resolved that a Department of Research and Personnel Services be established headed by a full-time Director whose duties shall be
>
> (a) to undertake Research Projects suggested by the Board, the Superintendent's Department, and Principals of the school system;
> (b) to re-organize, co-ordinate and standardize child accounting procedures in the school system;
> (c) to organize, co-ordinate and extend the counseling program in the schools;
> (d) to co-ordinate the special instructional

and auxiliary services, such as the special classes for gifted and retarded children;

(e) to co-ordinate the work of the Child Guidance Clinic with instructional services.

> In order to implement this policy, it is suggested that the Policy Committee together with the Superintendent's Department and in consultation with recognized authorities such as the Dean of the School of Social Work, the Dean of the Faculty of Education and the High School Inspector of the Department of Education for Winnipeg, work out the details of the organization of such a Department, its scope and duties.[1]

This matter was referred to the Policy Committee for consideration. On September 16, 1947, in the Minutes of the Board meeting, Adam Beck (School Trustee) reported that

> at the meeting of the Policy Committee, the Secretary stated that this item was included on the memorandum of matters dealt with by the Committee but not included in the formal report to the Board.[2]

Nothing was done about establishing such a department until 1948, when the results of the Report of the Directed Self Survey Winnipeg Public Schools (hereafter referred to as the Reavis Report) were tabled. The Reavis Report did, in fact, suggest that the position of Director of Research and Personnel be established at the School Board's earliest convenience.

The survey of conditions and practices in Winnipeg schools commenced in October 1947 under the direction of Dr. W. C. Reavis, Chairman, Committee on Field Services, Department of Education, University of Chicago. The purpose of the survey was to provide the School Board of Winnipeg No.1 and its administrative staff with an educational pattern with which to frame and implement future school policy. According to

Dr. Lorimer (cited in Chafe), the Reavis Report "set the stage" for much of the progress in Winnipeg No.1 after 1949.[3]

The Reavis Report recommended that the position of Director of Research and Personnel be established.[4] The five duties enumerated by David Orlikow in 1946 comprised Lorimer's responsibilities as Director of Research and Personnel in 1949.

As a newcomer to the District in 1949, Lorimer did not immediately understand the nature or character of the School District. The Reavis Report afforded him both an in-depth understanding of the practices and conditions (needs) of Winnipeg No.1 and a guide to action, with respect to the direction in which the District should go in light of the circumstances challenging its integrity of Winnipeg No.1, as he explains here:

> One thing that was very helpful was the Reavis Report, because it analyzed the District's operation and then made proposals for change. So when I came to the Winnipeg schools, I guess in July (1949), over summer, when schools were closed, I spent time getting oriented as to what the system was doing; what I was supposed to do and so on. As well as having discussions with the two assistant superintendents over the summer, I read the Reavis Report and analyzed what it had to say. It provided me with a good understanding of the system. Most importantly, it provided me with directions to go and that was a very fortunate happening. I mean if I hadn't had the Reavis Report, I would've had to find out where things were, what the state of affairs was, and where the system was supposed to be going.[5]

The changes in organization, administration, and the instructional program recommended in the Reavis Report were

aimed partly at making "school" a more democratic institution by providing for individual differences (needs) in pupils' intelligence, aptitude and emotional stability, and partly at preparing pupils to meet the demands of the workplace in an increasingly industrialized society.

When Lorimer arrived in the School District of Winnipeg No.1 in July of 1949, the situation he found there was not entirely unknown to him. School systems in cities throughout North America were also dealing with problems stemming from immigration, industrialization and urbanization. In the Preface of the Reavis Report (June 23, 1948), Dr. Pincock, Superintendent of the School District of Winnipeg No.1, characterized the situation confronting the School Board:

> ...Winnipeg, like other cities on this continent is confronted with many problems....The ways of life have changed. There has been an increasing concentration of population in large urban centers; the home and immediate community have changed, losing many of their functions and passing them on to the schools.
>
> Whereas, formerly, only the selected few continued through high school, now, practically all students remain in school to the age of sixteen years and an increasing number until seventeen and eighteen or even older. This has produced a more heterogeneous school population in the senior grades demanding varied courses of study and individualized instruction to meet the widely differing needs and abilities of individual students.
>
> There has been a shifting of emphasis from the traditional objectives of education which were concerned mainly with the mastering of subject matter, to a broader conception which includes in addition such objectives as health, worthy home membership, vocations, civic responsibility, worthy use of leisure time, and ethical character.
>
> Many of the buildings and much of the

> equipment are obsolete and do not serve a modern educational program for school and community as well as they should....the largely increased birth rates of recent years coupled with the establishment of many new homes in hitherto unoccupied portions of the City, necessitate the planning of a program for the selection of sites and building of new schools, which the Board has already undertaken.[6]

The situation in the School District of Winnipeg No.1 was somewhat better than in either the rural or suburban districts, including Ft. Garry and St. James. Winnipeg No.1 had been able to cope with the "Depression," fifteen years earlier, because it had a large tax base on which to draw. The adoption of salary schedules by the District (and other urban school districts) acted as a buffer to protect teachers' salaries, though teacher shortages continued to be a problem.[7] But, school continued to be an autocratic institution, at least in organization. This realization coupled with the unprecedented growth of public school education, after 1945, compelled the members of the School Board of the School District of Winnipeg No.1 to authorize a survey of the entire system.[8]

Arrangements were made with the Committee on Field Services, Department of Education, University of Chicago to survey the District. Chicago was chosen, presumably, because of the connection that existed between J.C. Pincock, superintendent, and the University of Chicago where he took post-graduate work.[9] Dr. W.C. Reavis, Chairman of the Committee, was responsible for the collection and analysis

of the survey data. Yet, despite his experience in conducting surveys of this nature, the undertaking in Winnipeg No.1 exceeded in scope and complexity anything he or any of his team members had ever attempted before. Reavis wrote of the study:

> The findings of these committees constitute in the judgment of the survey staff an epochal contribution in directed self-survey and appraisal of a local school system. Indeed, the survey staff knows of no other directed study by the personnel of a school system anywhere which compares with this self-survey in magnitude, quality, and specific character of findings.[10]

The Reavis Report called for a complete re-organization of the organizational and administrative structure (new governing arrangements) of the Winnipeg school system. In fact, Winnipeg was one of the first of the large cities in Canada to establish a modern school-administrative structure.[11]

With respect to the origins of the Reavis Report, George P. Macleod, Chairman, Winnipeg Public School Board, in his address to the citizens of Winnipeg, in 1948, explained, in the preface of the Report, that the original purpose of the School Board in deciding to make a complete survey of its entire school system through a team of experienced consultants from the University of Chicago were several, namely:

1. To take stock of current conditions as to the organization, administration, objectives, and curriculum of the schools;

2. To indicate to the Board and to the public what steps could be taken at the present time to enable

the schools to fulfill better their purpose and function in the development of our children and to meet better the needs of a modern democratic community, and

3. To give a long-view to planning, indicating the direction that a program should take in order to meet future needs in Winnipeg and to prepare our schools for the tasks of the coming years.[12]

A survey team (7 directors) from the University of Chicago spent a week (October 6-11, 1947) in the city organizing core committees comprised of administrative officials, supervisors, principals, teachers, and citizens (300) outside the schools. The core committees (16) in turn organized sub-committees (73) involving nearly all the personnel (504 were involved) employed in the system. In this way, the precise needs and problems of the schools were brought to light by those individuals who best understood the reasons behind the recommendations, which in turn offered the best guarantee of implementation. Local survey committees were organized to identify needs and to submit findings and recommendations to the School Board in two main areas: (1) organization and administration, and (2) curriculum, instruction, pupil, and personnel services. The Chicago team directed the survey, and the core and sub-committees compiled and submitted data.[13]

The scope of the survey was wide. Consequently, multiple committees were required to explore the different areas and report back to the advisers. The directors[14] defined the function of the committees in the following way:

> The purpose of each committee was to appraise the character of the services being rendered in the area of investigation, to identify the problems in need of solution, and to propose constructive solutions for consideration with its adviser...In the judgment of the survey staff the reports are not only meritorious as reports but also possess unique value as contributions to the history of public education in Winnipeg.[15]

According to Reavis, the recommendations of the Reavis Report were not proposed for hasty adoption but for careful consideration and deliberation. In effect, the recommendations constituted the basis for an evolving program of development and improvement in the organization, administration, and supervision of the Winnipeg schools.[16]

The conditions and needs of the Division's schools identified by the survey team, upon which the recommendations of the Reavis Report were based, appear to have adopted a time-horizon of approximately twelve years. Predictions for increases in pupil numbers, for example, did not extend beyond a twelve-year period (1948-1960). Clearly, the Reavis team could not be expected to make recommendations about future circumstances that they had no knowledge of. Nevertheless the Report did offer informed speculation about existing trends. And it did draw future scenarios.

On October 5, 1948, at a special meeting of the School Board, a motion was made that the Reavis Report be received and adopted. The motion was carried.[17] On October 8, 1948, at a special meeting of the School Board, it was moved that

the Reavis Report should be supplied free of charge to all members of the teaching staff and interested members of the public in order to inform the public as fully as possible of the recommendations of the Reavis Report and to secure their interest and support in improving the educational opportunities offered by Winnipeg No.1. The motion was voted on and carried.[18] Upon its adoption, the Reavis Report was assigned by Superintendent Pincock to Lorimer to oversee its implementation. Putting Lorimer in charge seemed to be a matter of necessity due to turnover in the senior administration of the School Division. Lorimer recalled that: "There was no one left with the same urge to implement the Reavis Report so a good deal of that responsibility fell on me."[19] One might also speculate that he got the job partly because he was interested in modernizing the District; partly because he was capable - his academic training included courses in administration, research, statistical procedures, and problems of staff personnel; partly because his previous experience as a teacher in the rural schools of Saskatchewan, as a vice-principal in the public schools of Regina, as a staff member of the Provincial Normal School at Moose Jaw, as a School Superintendent (Gull Lake area in rural Saskatchewan); and partly because he wanted to move forward in his career. Lorimer became the primary agent of implementation for the Reavis Report, and its recommendations provided him with an immediate context for the exercise of his leadership.

To sum up, in 1946, the Board expressed a need for a Director of Research. Before implementing this, the Board decided to commission an external audit of the needs and conditions of Winnipeg schools. The University of Chicago was hired to conduct the survey, which was completed in 1947-1948. Lorimer was hired in 1949 in response to an advertisement that emerged out of the recommendations of the Reavis Report. He was assigned a role in implementing the Report prior to his becoming the acting superintendent in 1952. As superintendent in 1953 (he was acting superintendent in 1952), his role in implementing the Report increased.

Let us now turn to an examination of the demographic, institutional, political, socio-cultural, and economic circumstances challenging the integrity of Winnipeg No.1.

Demographic Circumstances

Demography is the study of human populations with reference to size, density, and distribution. The demographic circumstance of primary importance to Winnipeg No.1 was the increase in pupil enrolment due to the post-World War II baby boom. Immigration proved to be a second important factor.

Enrolment projections provided in the Reavis Report for a ten-year period (1947 to 1957) showed an average increase of over 1,100 students per year.[20] Table 1 illustrates the

projected enrolments at the elementary level, in junior high schools, and in senior high schools for the period 1948 to 1960.

Table 1: Projected enrolments for the elementary, junior high, and senior high levels for The Winnipeg School Division No.1, 1948-1960.

Year	Elementary	Junior High	Senior High	Total
1948	18,299	7,363	4,766	30,448
1949	19,219	7,206	4,315	30,740
1950	20,375	7,058	4,088	31,521
1951	21,612	6,984	4,014	32,610
1952	23,028	6,955	3,951	33,934
1953	25,049	6,922	3,858	35,829
1954	26,570	7,415	3,742	37,727
1955	27,521	7,977	3,897	39,395
1956	27,791	9,049	3,805	40,645
1957	28,648	9,700	4,321	42,669
1958	27,742	10,174	4,814	42,730
1959	26,976	10,676	5,537	43,189
1960	25,465	11,708	5,607	42,780

Source: Report of the Directed Self Survey Winnipeg Public Schools 1948.

According to the Reavis Report, the School Board would need to provide a minimum of thirty new classrooms a year, or approximately three hundred new classrooms for the decade, assuming an average classroom size of around thirty-five pupils.[21]

Table 2 illustrates the actual growth percentages in pupil enrolment from 1951 to 1961, compared to the City of Winnipeg's population during the same period.[22]

Table 2: Actual percentage growth of total pupil enrolment for The Winnipeg School Division No.1 compared to the growth of Winnipeg, 1951-1961.

	Population of City (a)	School Enrolments (b)	Percentage (a) of (b)
1951	238,604	32,720	13.71
1961	257,000	47,315	18.41
% increase	7.7%	44.6%	

Source: The Winnipeg School Division No.1. ANNUAL REPORT FOR THE YEAR ENDED 1961. Winnipeg: The Winnipeg School Division No.1.

Between the years 1951-1961, school enrolments had increased by 44.6%, and the population of Winnipeg had increased by only 7.7%. In other words, school enrolments had increased by more than 5 times the rate that total city population had increased.[23] So, each year the Board was faced with the threefold task of accommodating more students, hiring more teachers, and expanding its tax base.

In 1949, total enrolment in the School District climbed to 30,219 from 29,892 pupils in the previous year.[24] By 1952 total enrolment had risen to 34,474.[25] In 1960 enrolment had increased to 46,340.[26] Total enrolment in the School District peaked in 1964 at 49,103. Yet, the average size of classes was down from 31.51 in 1960 to 30.29 in 1964 and, partly because of the increased number of specialist-teachers, the teacher-pupil ratio decreased from 27.14 to 25.22.[27] After, 1964, enrolment began to level off so that by 1966 the total number of pupils enrolled was 48,436.[28]

Table 3 illustrates the total pupil population (actual) of Winnipeg No.1 from 1948-1960 compared to the projections of the Reavis Report for the same time period.

Table 3: Comparison of actual pupil enrolment and projected pupil enrolment for The Winnipeg School Division No.1, 1948-1960.

Year	Actual Total Enrolment	Projected Total Enrolment	Difference
1948	29,892	30,448	556
1949	30,219	30,740	521
1950	31,305	31,521	216
1951	32,720	32,610	110
1952	34,475	33,934	541
1953	35,666	35,829	163
1954	37,950	37,727	223
1955	39,813	39,395	418
1956	40,970	40,645	325
1957	42,789	42,669	120
1958	44,275	42,730	455
1959	45,383	43,189	2,194
1960	46,340	42,780	3,560

Sources: Report of the Directed Self Survey Winnipeg Public Schools (1948) and the ANNUAL REPORTS of The Winnipeg School Division No.1 from 1948 to 1960.

Table 3 indicates that up until 1959, the difference between the Reavis Report's projections for total pupil enrolment from 1948 to 1959 varied from the actual pupil enrolment by less than 600 hundred pupils. In 1951, the difference between the actual and projected figures for total pupil enrolment was close at 110 pupils. However, in 1959, the difference between the Reavis Report's projection and actual pupil enrolment (2,194) clearly indicated to the School Board that the problem of growth in the pupil population was even bigger than the Reavis Report had projected.

Table four illustrates the growth in total pupil enrolment from 1960 to 1966 in each grade level: elementary, junior high and senior high

Table 4: Actual growth of pupil enrolment at the elementary, junior high, and senior high levels for The Winnipeg School Division No.1, 1960-1966.

Year	Elementary	Junior High	Senior High	Total
1960	28,660	11,469	6,211	46,340
1961	28,593	11,871	6,851	47,315
1962	28,436	11,693	7,701	47,830
1963	28,314	11,770	8,432	48,516
1964	28,228	11,873	9,002	49,103
1965	28,045	11,722	9,264	49,031
1966	27,667	11,809	8,960	48,436

Source: ANNUAL REPORTS (1960-1966) of The Winnipeg School Division No.1.

Total pupil enrolment decreased from 49,031 in 1965 to 48,436 in 1966 by 595 pupils or 1.2%. Elementary enrolment decreased for the 6th consecutive time from 27,991 to 27,620 or by 371 pupils. Junior high enrolment increased slightly from 11,722 to 11,809 or by 87 pupils, and the senior high enrolment decreased from 9,264 to 8,960 or by 304 pupils. The decrease in senior high enrolment is interesting, because it occurred despite increased emphasis on academic training.

Another factor responsible for the increase in pupil enrolment had to do with the distribution of immigrant families. The newcomers (Jews, Ukrainians, Poles, Hungarians, for example) crowded into the older, established

areas of the city and the pressure of their numbers kept the central area schools filled to capacity, making additions to existing schools or, alternatively, the construction of new schools necessary. At the same time increases in enrolment in widely scattered areas of the city and continued changes in population density consequent upon commercial expansion, new housing, and altered occupancy patterns made necessary the provision of further accommodation.[29]

Another factor that increased enrolment at the secondary level was students' realization that new skills were necessary to meet the demands of society. Chafe points out that in 1955, high school enrolment was increasing---49% of the previous year's grade XI graduates continued on into grade XII against a ten-year average of 31%.[30] In 1961, Manitoba experienced the so-called mild recession, which led to serious unemployment. In the ANNUAL REPORT FOR THE YEAR 1961, Lorimer observed that many boys and girls were remaining in school (past the leaving age) because the recession forced them to realize that their competence needed to be higher just to find adequate employment.[31] Thus, senior high enrolments were influenced by an increased demand for more training in industrial fields and the adaptation of automated techniques in business and industry with a consequent reduction in employment.[32] Senior high enrolments were also increasing because the University of Manitoba had made grade XII a minimum requirement for university entrance.[33]

More and better qualified teachers. As pupil enrolments increased, finding new teachers each year became increasingly difficult, as was stated in the ANNUAL REPORT FOR THE YEAR 1956:

> The problem of teacher supply is one that continues to be serious. Each year it is difficult to secure sufficient of the right kind of teachers for our schools....It is almost certain, therefore, that the situation at the secondary level will become increasingly serious and that some new approaches will have to be considered in the years immediately ahead.[34]

Lorimer's comment on the situation was that

> Teachers were scarce....Finding teachers was a tough job. We would still be short of teachers in the week or even days before school opened. And that was after we had recruited everywhere we could think of.[35]

In Manitoba, the minimum requirement for admission to Normal School was raised to grade XII in 1935. Many teachers, however, continued to teach under the old certificates where the minimum requirement for a third class teaching certificate, for example, was grade X.[36] And clearly, they could not continue to do so unless school boards were willing to hire them, which was indeed the case - especially in the isolated and rural areas of Manitoba.

Beginning in 1950, graduates of the Normal school were issued First Class certificates A or B, each letter having a further sub-division of interim or permanent. University graduates who had earned a B.A or B.Sc. received teaching certificates, interim or permanent, on successful completion of the Diploma year at the University of Manitoba, Faculty

of Education. However, the Department of Education required only one year of teacher training.[37] Yet some provinces and states required from two to four years of training.[38]

In this regard, the Reavis Report made the following recommendation in 1948:

> Definite steps should be taken towards the time when all teachers employed in Winnipeg have four years of post-high-school pre-service education. As an initial step, it is suggested that a co-operative planning committee representing the city schools, the Provincial Department of Education, the Normal School, and the University of Manitoba be established. Such a committee should have as its responsibility, the preparation of plans for both higher pre-service standards and better in-service education after teachers are employed. This recommendation urging a gradual but persistent increase in standards of pre-service preparation is of major importance.[39]

To counter the lack of qualified teachers available for recruitment, the Reavis Report had suggested that the School Division ought not to confine its search for qualified teachers solely to Winnipeg and the Province. In order to improve the quality of its instruction, the Division should attempt to secure the richness of ideas and the exceptional quality that can only be found through alternative sources of teachers either in other Canadian cities or the United States. Accordingly, the Reavis Report made the following recommendations:

> 1. The survey staff recommends that the Winnipeg school system, and the Department of Education of the Province of Manitoba, explore the possibilities for attracting more, and especially talented, persons into teaching.
>
> 2. A more aggressive recruitment policy by the Winnipeg School System is recommended as another means of compensating for the present shortage of qualified recruits of the teaching profession, and

as a method of securing the most competent teachers available.[40]

Despite all the efforts taken, the shortage of teachers continued to be a problem. Fourteen years later in the ANNUAL REPORT FOR THE YEAR 1962, Lorimer was forced to report that "The most serious issue facing Canadian education continues to be a shortage of well-qualified, dedicated teachers....the present basic qualification for teachers cannot be considered satisfactory."[41]

By 1966, the year that Lorimer resigned as superintendent, the problem of recruiting the "right kind of teacher" had eased somewhat largely because the number of applications received by the Division had increased, which, in turn, permitted greater selectivity. However, demographic circumstances brought to light in the Reavis Report also had a significant impact on the school plant of Winnipeg No.1.

More and better schools. In 1948, the age of the 62 buildings comprising the school plant of Winnipeg No.1 ranged from 10 to 57 years. In fact, eight buildings ranging in age from fifty-five to fifty-seven years were still in use. The Reavis Report declared these buildings and six other buildings averaging about forty years of age to be fully depreciated. A third group of ten buildings ranging in age from 35 to 39 years was found to be rapidly approaching full depreciation. Consequently, the Reavis Report declared that all buildings of advanced obsolescence were "hazards to

the general welfare of the pupils and teachers who are housed therein."[42] Further, the cost of maintaining fully depreciated buildings in the long-term would be out of all proportions to their original cost. Accordingly, the Reavis Report made the following recommendation:

> The survey staff recommends that the Superintendent of Schools and the Building Commissioner formulate a replacement program for these fourteen buildings for the early consideration of the school board and that the board give this problem the consideration which its gravity warrants.[43]

A second recommendation posited by the Reavis Report called for the School Board to develop a long-term program (a) of erecting new buildings when and where needed, (b) of replacing obsolete buildings hazardous to the health and safety of the children, and (c) of reconditioning some of the better old buildings, provided the structures could be greatly improved without excessive cost and their period of future service extended sufficiently to justify the expenditure required for the necessary rehabilitation.[44]

To ensure that Winnipeg No.1 would continue the long-term program of modernizing the school plant, the Reavis Report also recommended that

> on all these matters the Board must rely very largely on the judgment of the Superintendent of Schools and the school architect. In reaching a final decision the board must be guided by the supporting factual data prepared by its executive officers.[45]

In Chafe's history of the School Division, An Apple for the Teacher: A Centennial History of the School Division (1967), Lorimer offered the following explanation as to why the

Reavis Report was such an important catalyst for modernization. He said:

> By listing 14 schools as obsolete, it focused attention on the need for replacement or modernization. The result was the initiation of a one-mill capital levy to establish a capital reserve, and this money, with some money by-laws, has made it possible to carry on a strong building program.[46]

In 1953, Lorimer was appointed Superintendent of Schools of the School Board of Winnipeg No.1, and responsibility for assessing the integrity of the school plant and, indeed, for the success (or failure) of the building program was placed squarely on his shoulders. On average, schools were built or existing schools improved or additions built on to existing schools every two years for the period 1953 to 1966. In other words, millions of dollars were needed every two years to maintain the long-term program. But, how did the School Board of Winnipeg No.1 propose to finance the building program?

Money needed to build or refurbish a school, or even to build an addition onto an existing school (during Dr. Lorimer's leadership career) was acquired through money by-laws. Since the amount of any given money by-law for this purpose almost always exceeded one million dollars, and since the debt created by the issue of debentures by the City of Winnipeg had to be paid off on an annual basis (annual increases in mill rate contained in budget) by the ratepayers of the District under the provisions of <u>The Public Schools Act</u> (R.S.M. 1940, c.175) and <u>By-law No. 429</u>

of School District of Winnipeg No.1, each new money by-law had to be approved by a majority (60%) of the District's ratepayers before a debenture debt could be created, and then registered under the provisions of Chapter 68 of 7 & 8 (1908) of the Statues of Manitoba. The debenture contained a promise to pay the principal of the debenture and also the interest (3% or more) attached in the form of coupons, at the rate deemed appropriate by the School Board at the time of issue. Both the debentures and the coupons were to be paid, in lawful money of Canada, at the chief offices of the Bank of Montreal in Winnipeg, Toronto, Montreal or Vancouver at the holder's option. Debentures were issued in denominations of not less than $500.00 each, but could not exceed in the whole the sum of the by-law authorizing the borrowing of millions of dollars.[47] But, what was the financial role of the provincial government with respect to the building program?

Though the provincial government provided "teacher grants" and supplementary grants for maintenance, supplies, libraries, textbooks, and capital developments, the government was unwilling to finance the total cost of the building program, although it did provide some relief in the form of capital development grants. A further expansion of the payment of capital grants from 40% of a maximum of $15,000 per classroom to 75% in secondary schools of over 12 rooms was introduced in 1959. This had the effect of shifting the cost of school construction from owners of real

property to all taxpayers. Since these grants were made available for debt payments and not in cash sums, Lorimer reported in the ANNUAL REPORT FOR THE YEAR 1959 that "the need for the approval of ratepayers for the total cost of the building program still exists."[48] In other words, more than fifty percent of the money for the school building program was derived from the money by-laws. It would seem, however, that the Federal Government was more inclined than the provincial government to loosen its purse strings when it came to vocational schools.

In the ANNUAL REPORT FOR THE YEAR 1964, Gordon MacDonell, Assistant Superintendent, Secondary Education, observed that the Winnipeg School Board had entered into an agreement with the province of Manitoba, on the basis of the Technical and Vocational Training Assistance Act which had been passed by the Federal Government on December 20, 1960. The Act came into force on April 1, 1961 and was in effect for a period of six years. Under the provisions of the Act, the Federal Government would contribute 75% of provincial government capital expenditure for technical and vocational training facilities up to March 31, 1963 and 50% thereafter. This arrangement allowed school districts/divisions across Canada to build vocational schools. The province of Manitoba would build, and the Board would operate "a junior vocational school" (R. B. Russell Vocational High School), to meet the vocational and other educational needs of boys and girls whose academic limitations prevented their enrolment in the

senior vocational school, namely, the Technical-Vocational High School.[49]

In 1966, Lorimer decided to leave Winnipeg School Division No.1, after seventeen years of service, to accept an appointment as Deputy Minister of Education in the provincial Department of Education. In the article entitled "School Chairman Lauds Lorimer" that appeared in the Winnipeg Tribune (December 10, 1966), Walter Paschak, Chairman of the School Board, listed some of Lorimer's achievements. With respect to his contribution to the building program, Paschak said, "the superintendent had provided the leadership in Winnipeg for a 26.7 million dollar school building program."[50] From 1949 to 1966, twenty-four new schools were built in the Winnipeg School Division No.1.[51]

The Lorimer period, then, was marked by rapid growth in pupil enrolment with consequences for the hiring of teachers, and the provision (and financing) of suitable accommodations for the increased number of pupils.

Institutional Circumstances

A brief review of the Canadian design of education is necessary to better understand the relationship of the Department of Education in Manitoba to local school boards, the responsibilities of school boards as elected municipal governments, the leadership role of the superintendent, and

ultimately, the institutional circumstances that Lorimer paid attention to as context.

Canada is comprised of ten provinces and three territories. Provincial/territorial control over education constitutes the cornerstone of the design of provincial statutes. Customs, usage, and judicial review help to broaden, or narrow, and further define the scope of provincial designs with respect to their schools. Provincial authority for education was granted through Clause 93 of the British North America Act or Constitution Act (1867); the relevant provision states that

> In and for each Province the Legislature may exclusively make Laws in relation to Education, subject and according to the following provisions....[52]

The only limitations placed upon the exercise of these powers are contained in those subsections of the Manitoba Act that protect denominational and separate schools established by religious minorities in the province at Union in 1870. The relevant sub-sections of Section 22 read as follows:

22. In and for the Province, the said Legislature may exclusively make Laws in relation to Education, subject and according to the following provisions:

    (1) Nothing in any such law shall prejudicially affect any right or privilege with respect to denominational schools which any class of persons have by law in the province at union;

    (2) An appeal shall be to the Governor General-in-Council from any Act or decision of the Legislature of the Province, or of any Provincial Authority, affecting any right or privilege of the Protestant or Roman Catholic minority of the Queen's

subjects in relation to Education; and

> (3) In case any such Provincial Law, as from time to time seems to the Governor General-in-Council requisite for the due execution of the provisions of this section is not duly executed by the proper Provincial Authority in that behalf, then, and in every such case, and as for only as the circumstance of each case require, the Parliament of Canada may make remedial laws for the due execution of the provisions of this section....[53]

With the passage of The Manitoba Act in 1870, Manitoba entered Confederation as a province that was bicultural, bilingual and had a bicameral legislature. The first public school legislation in Manitoba in 1871 established a single board of education with two sections, Protestant and Catholic. The first School Board of the Protestant section in Winnipeg consisted of three members. Acting under the authority of The Public Schools Act of 1871, the year of their election, the trustees discharged the responsibility of providing for the education of the pupils in the School District of Winnipeg; they set about to secure a teacher and to maintain a schoolhouse. By 1876, the District had grown sufficiently to warrant the calling of a special meeting of ratepayers to consider the issuing of debentures for the construction of suitable schoolhouses in the School district. In 1882, the functions of building and school management were vested in separate committees of the Board, and in 1886, four committees were organized: finance, school management, building, and printing and supplies. On April 25th, 1882, the Protestant School Trustees of Winnipeg passed a motion calling for the establishment of a

provincial normal school in the city. In 1884, this resolution was put into effect.[54]

The provincial separate school question concerned Winnipeg. The city trustees of the Protestant School Board on October 5th, 1876, unanimously concurred in a resolution favouring a single system of state schools. With the passage of The Public Schools Act in 1890, the Protestant School District for Winnipeg and the Catholic School District for Winnipeg went out of existence and the territory was constituted The Winnipeg Public School District No.1. The Act made all Protestant and Catholic school districts subject to its provisions and established free public common schools. From a legal standpoint, French could continue as a language of instruction and as a subject of study in public schools. However, the passage of The Public Schools Act in 1894 forbade municipal councils to grant money, levy taxes, or collect taxes for the support of francophone Catholic schools.[55]

Further, the Act made no provision for separate schools. A single system of administration was established, and the statutory provisions of the Act set out duties as the responsibilities of boards of trustees in cities, towns, and villages; their term of office; the duties of school inspectors; penalties and prohibitions; and provisions as to Catholic school districts.[56]

With respect to Aboriginal people, The Indian Act was introduced by the Government of Canada in 1876 and has been revised several times since. The Act provided the legal framework that has regulated the federal government's relationship with registered Indians. Administrative responsibility has resided primarily with the federal Department of Indian and Northern Affairs. Sections 114 to 122 of the Act deal specifically with schooling. Section 114 addresses the question of control over schools. It states:

> 1. The Governor in Council may authorize the Minister of Indian and Northern Affairs in accordance with this Act to enter into agreements on behalf of her Majesty for the education in accordance with this Act of Indian children, with:
>
> a) the government of a province
> b) the Commissioner of the Northwest Territories
> c) the Commissioner of the Yukon Territory
> d) a public or separate school board, and
> e) a religious or charitable organization.[57]

In the 1960s, under a new federal vision of Indian education, there was some movement toward integrating Indian children into the provincial school systems, including the Winnipeg School Division No.1, either through master tuition agreements between federal and provincial governments or through individual agreements between federal and local school boards.[58]

Role of departments of education. In each province, the Department of Education of the government is the central authority. All authority is delegated to the Department of Education through its minister and by way of various legislative acts and regulations. Thus, the various types of

local or regional organizations (districts, divisions, units, or counties) and their respective governing bodies exist at the pleasure of the provincial legislatures. By law the responsibility for education in each province rests with the provincial government, a fact that cannot be overlooked. School districts and thus school boards are legal creatures of the provincial government.[59]

However, education is one of the most important and sensitive fields of public policy at the provincial level. This fact ensures that a backlash will occur if there are moves to centralize authority within the provincial department or to weaken local control. Differences in power and influence of the various departments depend upon provincial priorities and the capabilities of individual ministers. Educational officials in departments of education in each province are civil servants subject to the same regulations for appointment and pay as apply to all civil servants. Thus, the protection of education against undue political interference is bound up with the status of the civil service as a non-partisan, apolitical body. In fact, if one were to survey the employees of provincial departments of education, one would find that in virtually every position of decision-making the incumbents frequently have been educated initially as school teachers.[60]

The senior position in the Department of Education is the Minister of Education. He or she must be a member of the

Legislative Assembly who is then granted the portfolio of education from the Lieutenant Governor upon the recommendation of the Premier. The Minister of Education, having acquired this position through politics, must, at all times, remain politically astute if he/she wishes to retain the position. The structure and organization of the Department of Education varies from province to province. In most provinces, there is a deputy minister appointed by the premier. He/she is responsible directly to the minister. The deputy minister is assisted by several assistant deputy ministers each in charge of a particular part of the department such as curriculum development, research and development, and teacher certification. The deputy minister will most often have been either a teacher or school administrator. The job of the deputy minister is twofold: first, to advise the Minister on professional information and advice with respect to a desired policy, and, second, to implement policies (approved by the Premier) and directions of the Minister. The person in charge at the next lower level of operations is usually referred to as the Director. He or she has a specific area of concern and a staff to fulfill that function. Directors tend to work at the professional level and thus their involvement with politics is very limited.[61]

The overall responsibility for basic education lies with each province. Provincial governments, through their agencies (school boards and their administrative officials),

translate society's needs and aspirations into specific objectives and then define the skills and knowledge required to achieve these purposes. But, the structure through which the service is provided should permit a significant amount of autonomy in decision-making by school boards. Hence, the provincial education ministry should designate those objectives which are to be included in common education for all, and it should insure that they are incorporated into locally designed programs.[62]

In Manitoba, in accordance with An Act Respecting The Department of Education (1953), the term "Department of Education" was defined in Chapter 67 of the Revised Statutes of Manitoba, 1954 in the following way.

> 1. There shall be a department of the Government of Manitoba called: "The Department of Education," over which the Minister of Education, appointed by the Lieutenant-Governor-in-Council under the great seal, shall preside, and the Minister shall hold office during pleasure, and shall have the management and direction of the department.[63]
>
> 5. The minister shall have the supervision, control, and direction of all public and secondary schools, model and normal schools, schools for the deaf and dumb and the education of blind persons, and all other schools established pursuant to this Act. Acts administered by the minister are:
>
> *The School Attendance Act.*
> *The Public Schools Act.*
> *The Manitoba School for the Deaf Act.*
> *The Blind Persons' and Deaf Persons' Maintenance and Education Act.*
> *The Teachers' Retirement Allowances Act.*[64]

With respect to the powers and duties of the Minister of Education, some are enumerated here in order to illustrate

the minister's scope of authority in relation to school systems like Winnipeg No.1. These include the following:

> 6. (1) The minister may,
>
> (a) prescribe the qualifications and duties of the Chief Inspector of Schools and inspectors of public and secondary schools;
>
> (b) make regulations respecting the duties of teachers;
>
> (c) prescribe the classification, organization, discipline, and government of normal, model, secondary, and public schools;
>
> (f) provide for the establishment of technical, agricultural, summer, and residential schools, or any of such schools, which shall be public schools and shall be operated by the minister for the education of such persons as the minister may specify in regulations made by him;
>
> (l) make regulations respecting the qualifications, including physical qualifications of teachers for normal, model, secondary, summer, and public schools and any other schools established pursuant to this Act;
>
> (t) prescribe the text books to be used, and the moving picture films that may be shown, and the radio programs that may be received, in schools;
>
> (u) prescribe the courses of study, including correspondence and other courses;
>
> 8. (1) The minister may issue teachers' certificates of such grades or classes, and in such form, as he prescribes, and may cancel or suspend a certificate issued to a teacher for any cause he deems sufficient; but the minister shall not cancel a teacher's certificate for any cause other than incompetency or disqualification on physical grounds until the case has been submitted to the discipline committee and the committee has reported to him with respect thereto, and
>
> 13. (3) The minister may, subject to subsection, make regulations prescribing the terms and conditions upon which loans may be made under this section and the terms of repayment thereof.[65]

Clearly, a superintendent or CEO of a school division has to be mindful both of a province and especially its provisions and Regulations.

Local school governance. As creations of the provincial government, school boards are accountable to the Department of Education (Minister of Education) for the implementation of the statutes and regulations that direct the educational service provided to Canadian communities. Moreover, school boards are also accountable politically to the electorate for implementing their common wishes with respect to their children's education. The job of the school board is to administer school systems by ensuring the compliance of staff to local provincial laws, and by being responsive to local needs and aspirations through its policy-making [66]

The school board is, in fact, a corporate body with legally defined duties that exist apart from the elected political officials who make up the board. Thus, the board acts only as a board, not as individuals. Individual trustees cannot exercise the power of the board unless authorized to do so by resolution. Nor can the courts interfere with the operations of the board as long as the board does not exceed its powers as specified by law, as long it acts in good faith, and in general as long as it does not act prejudicially or unjustly. School boards are responsible for the administration of school systems. Elected school board

members are assisted by a professional administration headed by a superintendent of schools, or director of education.[67]

The powers and duties of boards of trustees in Manitoba enumerated below serve to illustrate the nature and scope of the School Board's authority in Winnipeg No.1. Thus, under the heading POWERS AND DUTIES OF BOARDS OF TRUSTEES AND OFFICERS OF SCHOOL DISTRICTS - General Provisions - Part VI of The Public Schools Act, Cap.215 - 1954, Section 135 states in part:

> (1) A board of trustees may
>
> C) with the consent of the minister establish the position of superintendent; and without that consent appoint a superintendent where the position has been established;
>
> d) appoint by resolution such officials and assistants as may be deemed necessary.[68]

In contrast, Section 143, Part VI of The Public Schools Act, CAP.215 - 1954, contains the mandatory provisions respecting the duties of school boards. Section 143. (1) states in part: The board of trustees of a city, town, or village school district shall .

> a) provide adequate school accommodation for the children resident in the district who are between the ages of six and sixteen years;
>
> b) select and purchase or rent school sites and premises, and build, repair, furnish, keep in order and regulate the use of the school houses and appendages, lands, enclosures and movable property, and procure registers in the prescribed form, suitable maps, apparatus, and books and establish and maintain school libraries;

c) determine the number, kind, grade, and description of schools to be established and maintained;

d) in the case of a city school district, constitute, at its discretion, one or more of the schools as a model school or schools for the preliminary training of teachers therein, subject to the regulations;

e) provide suitable accommodation for all books furnished by the minister, and require the teacher to keep an accurate statement of the receipt and distribution of all such books in the records furnished by the minister, and to fulfill his duties with regard to the books;

f) erect and maintain, upon each school house or on school grounds surrounding each school house, a flag-staff in height not less than ten feet above the ridge of the school house or, if the flagstaff is erected on the grounds, not less than twenty feet above the ground, and provide a British national flag in size not less than four and one-half by nine feet, and cause it to be flown from the flagstaff during school hours on each day that the school is open, weather permitting;

h) authorize the disbursement of any moneys of district that are expended;

i) publish in one or more newspapers or otherwise the annual report of the audit, and prepare and transmit to the minister annually, before the first day of August, in the form prescribed by him, a report signed by the minister;

m) engage the required number of legally qualified teachers for the district of whom none shall be the son, daughter, brother, sister, husband, or wife, of a trustee unless with the approval of the minister;

n) fix the salaries of teachers either individually or by reference to a salary schedule; and

q) prescribe the duties that teachers are to perform, subject to this Act and the regulations.[69]

Prior to 1953 in the School Division of Winnipeg No.1, the organization of the central administration office as set up by the School Board for the administration of schools under its charge was characterized by the Reavis Report as the "multiple type." In this type of arrangement the Board

assumed responsibility for coordinating the activities of all five of its "executive officers" - each of whom headed one of the following departments: finance, building, instruction, supply, and engineering. Under this arrangement each officer was not only directly responsible to the Board, but no one had authority transcending that of another officer. Hence, the relationship between the executive officers was at best informal even though each understood that they were expected to operate as a team in serving the schools. If differences in opinion arose they had to be talked out or referred to the Board for adjudication. However, since the executives concerned had to deal directly with standing committees, the possibility existed that a committee or committees might take sides in the event of a controversy which could in turn split the Board.[70]

The Reavis Report noted that the multiple type of arrangement did not function as badly as it might, because the executives were all men of high character who understood each other's good points as well as weaknesses. Most importantly each had the welfare of the system at heart, and each understood that schools existed solely for educational - not political purposes. Moreover, all generally regarded the superintendent as the unspecified "captain of the team." It might well be assumed, therefore, that in order for the multiple type of arrangement to work effectively, all fifteen members of the Board had to be available for

consultation at all times in order to coordinate effectively the activities of all five of its departments.[71]

Since the members of the Board could not be available at all times for consultation, the Reavis Report concluded that the Board could not be a good coordinating body. Thus, in the interest of efficiency and the smooth operation of the School Division, the Reavis Report recommended that the Board should work towards the establishment of a "unit type" of organization in which the locus of control of the administration of the Division should be transferred from the Board and placed under one central authority, namely, the superintendent.[72]

Superintendent as chief executive officer. Despite changing conditions impinging both on society and school systems, the School Board of Winnipeg No.1 maintained the multiple type of administrative structure, developed in Winnipeg No.1 during the 1880s, in which it - not the superintendent - assumed responsibility in such a way as to preserve the organization as the instrument of action. However, when the Reavis Report was tabled in 1948, the survey team found that the Board was in need of improvement in nine areas:

> The most serious of these is the tendency of the board not to recognize the authority of the superintendent.[73]

Accordingly, the Reavis Report recommended that

> ...the board either by resolution or by amendment to the By-laws give the superintendent the status of chief executive officer of the board with the right

> to attend all standing committees without being summoned and to be heard on any matter to be presented for the consideration of the board.[74]

No superintendent in Winnipeg had ever had the status of chief executive officer (CEO) of the board. Thus, Lorimer was not a CEO by statute, although this has long been an aspiration of the Manitoba Association of School Superintendents (MASS). Nor could the superintendent assume a leadership role that the Board had prohibited by the organization (multiple type of administrative organization) it had adopted, or that it had failed to specify in its operating by-laws. Only the boldest type of superintendent (Dr. Daniel McIntyre - 1885-1928, for example) would undertake to assume a role of leadership with the Board under the circumstances. Accordingly, the Reavis Report further recommended that the school organization change to a "unit type" (unitary control) of organization, so that the superintendent would not be placed in a position of having to constantly overstep his authority in order to lead.[75]

In a unitary school organization the five executive officers heading each division (Finance, Building, Instruction, Supply, and Engineering) would no longer operate independently or report separately to the Board. Instead, they would report directly to the superintendent who, in turn, would deal directly with the Board, and not independently through a standing committee. In addition, the Reavis Report proposed that the superintendent (in his proposed role as the chief executive officer of the Board)

should be accorded the requisite authority to appoint his staff, plan with their assistance the instructional program - subject of course to the approval of trustees. The superintendent would be responsible to the Board for the overall management and supervision of the schools and for the acts, successes or failures of those with whom he would be associated. The superintendent should guide the actions (take the initiative in formulating policy) of the Board with respect to the educational services of the schools, but the School Board should not be subordinate to the superintendent. In fact, the Reavis Report stipulated that a strong school board capable of critically evaluating the policy recommendations of its superintendent and of formulating (with the help of the superintendent) educational policies in harmony with The Public Schools Act of Manitoba would be required.[76]

The School Board agreed. In doing so, the Board had in principle also agreed to elevate (in formal, organizational terms) the status of the superintendent to that of educational leader. Since this type of relationship had never existed (officially) in the history of Winnipeg No.1, the Reavis Report further recommended that the relations of the superintendent and "his" board be that of a responsible executive to a board of directors who exercise legislative and judicial responsibilities.[77]

In order to coordinate the whole school system with the superintendent as its administrative leader, the Reavis Report further recommended that the existing "Code of By-laws" published in 1943 required a "thorough revision" and that the superintendent should facilitate its completion. The new Code of Rules and Regulations was adopted in March 1954, revised in 1958, and further revised in March of 1961. This document contained statements of administrative procedures under which the schools of the District were to function. Its rules were supplementary to The Public Schools Act and to the Regulations of the Department of Education. Moreover, it was not assumed that the rules stipulated in the document would provide definite answers to all questions of administrative policy and procedure. It was assumed, however, that these rules would require intelligent study and interpretation in relation to the educational needs of the community.[78]

Lorimer applied for the job of superintendent, and on March 31, 1953, the following motion was made in the Minutes of the School Board:

> To the Chairman and Members,
> Winnipeg Public School Board.
> Your Committee of the Whole Board begs to recommend:
> 1. Appointment of New Superintendent
> That Dr. W.C. Lorimer be appointed as Superintendent of The School District of Winnipeg No.1 for a period of five years from August 3rd, 1953, at a salary of $9,000.00 per annum with one (1) increment of $1,000.00 effective August 3rd, 1954, and that in the interim Dr. Lorimer be appointed Acting Superintendent at a salary of $9,000.00 per annum commencing April 1st, 1953.

> Motion for adoption of the report was then voted on and declared. Carried.[79]

Lorimer was Winnipeg No.1's tenth superintendent. He served as superintendent of schools for almost three terms (five years per term) with six different Boards, which strongly suggests that Trustees had confidence in his leadership.

The essential duties of the superintendent as laid out in the Code of Rules and Regulations (1961) state:

> The superintendent shall be the chief executive officer of the Board. In this capacity he shall be responsible for the development of policies that have been approved by the Board. As part of his responsibilities the superintendent shall keep the Board informed of the developments in the whole field of education as they affect the Winnipeg schools and shall make suggestions and recommendations to promote total program which will serve efficiently the educational needs of the District.[80]

Without in any way restricting the generality of the foregoing the superintendent shall:

1. Attend all meetings of the Board and may attend any committee meetings except where his own tenure, salary, or efficiency are under consideration.

2. Keep the School Board informed as to how its policies are being carried out and as to the conditions and efficiency of the school system.

3. Co-ordinate the activities of all departments and be responsible for their efficient operation.

4. Submit to the Board upon the advice of the heads of the Departments concerned, recommendations for all appointments, promotions, suspensions, dismissals, and retirements of Board employees. In case of emergency, with the concurrence of the chairman of the Board, have power to suspend any employee; any such suspensions to be reported to the Board at its next meeting.

5. Direct the preparation of the budget.

6. Keep the Board informed of the needs for school

sites and accommodation and make recommendations thereon.

7. Develop and foster a sound program of public relations.

8. Have power to suspend any pupil subject to the regulations made under The Department of Education Act.

9. Have power, in the event of his absence from the School District or being unable to attend to his duties due to illness, to appoint one of the assistant superintendents of the District to act in his place, for a period of not more than two weeks, and such assistant superintendent so appointed shall during the absence of the superintendent have all the powers and carry out all the duties of the superintendent until the next meeting of the Board which shall take place within the said two weeks period.

10. In the event of the absence from the School District of both the secretary-treasurer and the assistant secretary-treasurer or in the event of the absence of both of them through illness the superintendent shall have full power and authority to sign any By-law of the School Division or any other documents usually signed by the secretary-treasurer and to do any other act which the secretary-treasurer could have done had he himself been present.[81]

The superintendent's duties as laid out in 1954 have remained substantially the same to the present day with one notable exception. When the document The Superintendency: A Resource Document (1990) is compared to the Code of Rules and Regulations (1954), it is apparent that an additional duty has been added to those established in 1954. It reads:

> The superintendent of schools shall be directly responsible for:
>
> 9. Organizing and instituting a board orientation session after every election and organizing an annual board/senior administration session.[82]

The administrative staff (superintendency) of Winnipeg No.1 in 1947 was comprised of nine members: superintendent, assistant superintendents (2), secretary-treasurer, assistant secretary-treasurer, commissioner of buildings, commissioner of supplies, chief operating engineer, and solicitor.[83]

In 1954, two changes were made to the nine member administrative staff. The office of the commissioner of buildings became the commissioner of works and buildings, and the commissioner of supplies became the purchasing agent.[84] By 1963, Lorimer's staff had grown from eight members (as compared to 1947) to twelve members with the addition of four new positions: administrative assistant, director of research, elementary assistant, and director of maintenance.[85] Perhaps the most important change administratively concerned the role of the secretary-treasurer.

The salient duties of the secretary-treasurer as laid out in Section V of By-Law No.333 (1943) stated: the secretary-treasurer shall:

1. Attend all meetings of the Board and of the several standing committees, and record the minutes of the proceedings of such meetings, and not less than twenty-four hours before the regular meetings of the Board, supply a copy of the reports of committees excepting the committee on finance to each member.

15. Furnish under direction of the Board to the City Clerk, as required by law, a statement of the amount required to be levied during the current year to meet the estimated expenditures of the Board, and

also to perform such other duties as are required by The Manitoba Public Schools Act.

16. Submit to the standing committees at the regular meetings in September of each year, a statement of the amount expended and unexpended on the different items contained in the estimates for the year.[86]

In the ANNUAL REPORT FOR THE YEAR 1958, Lorimer indicated the nature and scope of the change to the secretary-treasurer's responsibilities.

> A change was made in the administrative organization of the School District on January 1, 1958, when the Secretary-Treasurer assumed responsibility for all the business operations of the District. In this regard the Architect and the Director of Maintenance became responsible to the Secretary-Treasurer for the general operation of their respective departments, but retained responsibility for the organization and day-to-day operation of the departments.[87]

In 1961, the duties of the secretary-treasurer as set out in 1958 were revised. The significant change/difference that appeared in the Code of Rules and Regulations (1961) was that it clarified the relationship of the secretary-treasurer to the superintendent, and placed the secretary-treasurer under Lorimer's "direction and supervision." Section 1.7-Duties of the Secretary-Treasurer stated:

> In addition to the duties required to be performed by the secretary-treasurer under the provisions of The Public Schools Act, the secretary-treasurer shall under the direction and supervision of the superintendent, conduct all the business of the business affairs of the Board and to this end he shall organize his department and assign duties to his staff.[88]

In conclusion, it seemed important to mention here that the institutional circumstances challenging the integrity of the Winnipeg school system were similar to those hindering the

expeditious management of education in American school systems during the 1930s. The American school boards dealt with their situation by embodying the executive function of their school systems in the person of the superintendent. Hence, the Reavis team sought to correct the restrictions of the powers of the superintendent in Winnipeg in the same way, by recommending a shift in organization that would provide the superintendent with authority over other divisions of the school system that were ancillary to the function of instruction. Lucow, in describing the organization of administration in Winnipeg No.1, concluded that the change in the superintendent's function in Winnipeg No.1, as recommended by the Reavis Report, was entirely in keeping with Thomas Gilland's (1935) estimation of the changing position of the superintendent in American cities during the 1930s, which he described in his doctoral dissertation entitled: The Origin and Development of the Power and Duties of the City-School Superintendent.[89]

Socio-Cultural Circumstances

When Lorimer arrived in Winnipeg No.1 in 1949, Canada was just emerging from the depression and World War II. Everywhere, the post-war baby boom was underway. Winnipeg had a total population of 231,491, and pupil enrolment was 31,072 and growing.[90] In fact, the years between 1946 and the early 1970s in Winnipeg were ones marked by economic growth, prosperity, and social change.

Chafe describes the socio-economic situation in Winnipeg after 1950 as the "good life".[91] The development of an industrial economy brought with it not only changes in occupational structure, but also important changes in the socio-cultural circumstances of Winnipeg.[92] He notes, for example, that here was a return of the old confidence among Winnipeg's Anglo-Saxons and this fact, coupled with the revitalized other ethnic groups, brought about renewed vigor in Winnipeg society. Indicators of socio-cultural development included the creation of various cultural organizations, such as The Manitoba Theatre Centre and the Manitoba Historical Society, and the holding of such events as the Pan-American Games in 1967.[93]

Similarly, Artibise observes that late in the 1950s and early 1960s in Winnipeg, industry made the "good life" in the fullest sense available as never before. He notes, for example, that the Progressive Conservative government of Duff Roblin (elected in 1958) brought with it an administration that was more mindful of urban problems and needs than previous governments. In its creation of the Metropolitan Corporation of Greater Winnipeg, its relaxation of liquor laws, its redistribution of seats in the provincial legislature (giving the city an increased voice in the affairs of the province), its support through government grants to art galleries, museums, and different cultural organizations, the new government encouraged and helped Winnipeg to become a thriving center for literature

and sport. With respect to cultural activities, the accomplishments of the Royal Winnipeg Ballet, the Winnipeg Symphony Orchestra, Rainbow Stage, the Winnipeg Art Gallery, and creation of a major library in the downtown core by the City of Winnipeg as a centennial project earned Winnipeg the reputation as having "the most vitally alive and well balanced range of musical, artistic and cultural activities of any Canadian city."[94]

Prosperity, explains Porter, represented an opportunity for large numbers of the unskilled lower classes (immigrant groups, for example) to move upwards in the class structure. This process sociologists call social mobility; it is a condition in which individuals are better off or achieve higher status than their parents. Upward mobility is the social counterpart of the upgrading of the work force. The educational level of the population, then, can be considered the single most critical measure of capacity for industrial development and, indeed, socio-cultural change. Thus, it is important to acknowledge the civilizing and humanizing effects of education and the role that education played in providing skills and technology to those in the post-Second World War era.[95]

Prosperity brought with it progress, particularly in terms of higher standards of living, and a more widespread appreciation for culture, lengthening of life, control of disease, reduction of the working day, and especially higher

levels of education. But there are costs associated with social change too, such as increased rates of deviant behaviour, suicide, and mental disorders. But, as Porter points out, "it is doubtful, however, that given a choice a majority of Canadians would want to return to the kind of life that went with earlier periods in Winnipeg's history characterized by social, economic, and political divisions, or the old ruralism."[96] Those who might benefit the most economically and socially from a steadily improving economy were the immigrant families and the so-called "in-betweens".

From an economic and social standpoint Winnipeg families belonged to roughly one of three "classes". There were, notes Chafe, the poor families, mostly immigrant (Ukrainians, Poles, Italians, Jews and Germans had been added to French and British), living in the North End and making up some 10% of the population; the wealthy, living mostly south of Portage Avenue, who made up approximately 2%, and the rest, the great majority, or so-called "in-betweens"—economically, socially, and geographically who made up the rest of the population.[97] There were also the Aboriginal peoples.

Porter analyzed the socio-economic circumstances of the Aboriginal peoples who resided in Canadian provinces during the 1960s and concluded that as a people: "they are the most distressed of all Canadians." Porter also concluded that "native Indians" were at the lowest end of the occupational

ladder. Though many aboriginals were absorbed into the white man's economy primarily as unskilled workers, during the 1960s their generally low level of education and remote locations made it difficult to integrate them into the industrial economy. And like the immigrant groups, the aboriginal peoples placed a high premium on their ethnicity and culture. But unlike aboriginal children, the children of immigrant parents did possess the requisite level of education, and they were better positioned, geographically, to take advantage of educational opportunity.[98]

The school's role in social change. In Winnipeg, during the early 1900s, the "Charter group" (Artibise coined the term to describe the Anglo-Saxon elite)[99] believed that public education was the key to assimilating the immigrants and elevating them to the level of Canadian life. The Charter group believed that Winnipeg (and Canada) should remain British. In other words, the concept of cultural pluralism (or a cultural mosaic), used so often to describe Canadian society in later years, was not even contemplated during this period.[100] The Charter group thought that by teaching foreign children to speak English they would automatically become part of a homogeneous society. The Charter group and the Winnipeg Public School system, which was to be the instrument of assimilation, failed to recognize that the process of assimilation was complex and affected by many and often intangible factors.[101]

The efforts of the Winnipeg School Board to use the educational system as an assimilating instrument were frustrated by problems other than facilities or language. One of these was the tendency of the immigrants to take upon themselves the job of educating their own children in the language and culture of their particular group. Moreover, thousands more attended evening or weekend classes conducted by the religious and cultural organizations of the various ethnic groups. In fact, by the early 1900s, it was apparent to the Charter group and the Winnipeg School Board that many immigrant children had not been Canadianized at all, or they were assimilated at a rate deemed unsatisfactory by the city's Anglo-Saxon elite. Subsequently, the Charter group began to push the provincial government for compulsory attendance, thinking that this would solve the problem of attendance and thus facilitate the acquisition of the English language.[102]

In 1915, the newly elected Norris government passed a compulsory attendance law and all immigrant children of school age were compelled to attend public schools and learn English. As far as the English majority was concerned the legislation had the desired effect. In subsequent years, all foreign children learned English as a matter of course. However, Winnipeg had not succeeded in assimilating the foreigner to any great extent.[103]

Chafe notes that during the depression years, the 1930s, the Winnipeg School Board began to change its thinking with respect to the education of its pupils, including immigrant children. Instead of demanding that students adjust themselves to fit the system, the system should be adjusted to fit the student.[104] In other words, there was more at stake than teaching immigrant children to speak English; now the schools would have to prepare them for a way of life much different from that which their parents had known. Part of this understanding involved the Board's realization that these children should not be alienated from their parents or from their culture.[105]

The School District of Winnipeg No.1 understood that if its schools were to serve their purpose in society, the support of the community and especially that of the parents was needed. In the ANNUAL REPORT FOR THE YEAR 1956, Lorimer addressed the need to educate parents as well as their children:

> In recent years one feature of education has been the increasing interest that has been taken in the schools not only by parents but also the general public.... In the last five or six years increasing emphasis has been placed on this visitation by the holding of open-house during "Education Week" in March. During this week there is a concerted attempt to encourage all citizens to focus attention on education in order that the schools may not only explain what they are doing and trying to do, but that they may also invite the community to express its opinions and its desires for the schools....It becomes more apparent in our society that a sound basic education is necessary for all boys and girls in order that they may fit themselves into our increasingly industrialized society.[106]

Furthermore, the establishment of an industrialized society, especially one that was ethnically diverse, created social needs that had to be met. The surest way to satisfy those needs was through the schools. One might suggest, therefore, that Lorimer also paid attention to those individuals in society whose circumstances put them at a disadvantage with respect to equality of educational opportunity. They would also include the mentally handicapped and the physically challenged. The School District of Winnipeg No.1 had the only classes in the province for the mentally handicapped and there were no special classes for any other students in the province.[107] Not surprisingly, more and better education was therefore both needed and demanded.

"Free" thinking and nonconformist action were prevalent during the "60s." It was a turbulent era, made so by free love, the pill, the women's movement, the Beatles, and hippies. People, especially young people were asking questions that could not be answered; they wanted to do their own thing, and do it in schools. But schools, as Sybil Shack (cited in Chafe) explains here, were somewhat ambivalent in their purpose.

> ...without realizing it, we are being both progressive and conservative. The school is trying to look ahead, to prepare the child for the future, but because the school is a product and reflection of society, the principal service it offers is the preservation of society.[108]

Though the school was trying to look ahead, to prepare the child for society, even as the values of society were

changing, the principal service it offered was the preservation of that society. Thus, if the individual is being conditioned not to question, he or she is not developing his potentialities. Students opposed the system, demanded to be heard (student power); but as A. D. Thomson, Assistant Superintendent, Elementary Schools pointed out in the ANNUAL REPORT FOR THE YEAR 1966, in a rapidly changing society, with its emphasis on technology, one can expect that changes will continue. And if one accepts that the school should properly reflect the society it serves, "it would appear that many of the changes were over-due, and that the "new" of today will be the "old" of tomorrow."[109]

Winnipeg did not resist change; rather, it was slow to change. The Winnipeg School Division No.1 strove to expand educational opportunity with innovative programs and offerings. Instead of reflecting the society it currently served, the Division sought to reflect society as it believed it should be, during the turbulent "60s".

One might conclude from the discussion above that the socio-cultural climate supported the educational system; that people by and large had confidence in the system; and that The Winnipeg School Division No.1 saw that it must move forward.

Political Circumstances

As Superintendent and CEO of the School Board, Lorimer's primary duty was twofold: to formulate policies for the

approval of the School Board and to administer policies approved by the Board, and to make suggestions and recommendations to promote a total program that would serve efficiently the educational needs of the District/Division. Notwithstanding, he was also responsible for the overall management and supervision of the entire school system, including the activities and actions of the employees of the Board.[110]

Public policy refers to the official course or method of action chosen by a governmental authority, such as a school board in light of certain conditions, to guide and determine present and future decisions. School Board policies, assert Giles and Proudfoot, are major guidelines for future discretionary action by professional staff, such as the superintendent.[111] The superintendent is responsible for providing leadership and direction to trustees with respect to educational goals and the needs and expectations of the community. In policy-making the superintendent provides the Board members with the information they need to make informed decisions about whether or not a policy ought to be adopted. On occasion, the superintendent may attempt to convince/influence board members not to adopt a particular policy, or, alternatively, to adopt a policy that they would otherwise not have adopted.

According to Presthus, the ability of A to influence B is necessarily dependent on A's and B's political resources.

Since these resources are not equally distributed, we can assume that the ability of, say, a superintendent to influence school trustees will also vary.[112] Dahl suggests that differences in the amount of influence that persons exercise can be attributed to (1) differences in the distribution of political resources; (2) variations in the skill or efficiency with which individuals use political resources, and (3) variations in the extent to which individuals use their resources specifically for political purposes. These variations are themselves traceable to differences in motivations that arise out of variations in political experiences, for instance.[113]

But, political resources are not the only factors that determine an individual's (or group's) influence. Obviously, where an individual's interests are relatively similar to those of a decision-making authority, the more successful should be the individual's attempts to influence the policy decisions of that authority. Moreover, personal attributes, intelligence, foresight, self-confidence, and interpersonal skills can play an important role in influencing the actions of decision-making authorities. The comments of Premier Duff Roblin about "personality" indicate that he valued Lorimer's personal attributes.

> Wes is not one of these egotistical, self-satisfied people at all. He is a quiet, reflective person I respect. That doesn't mean he is not decisive. It doesn't mean that he doesn't know where he wants to go. It doesn't mean that he doesn't know how to get there. I think that he has all those qualities. But, his personality was more civilized. It doesn't mean

that he is lacking in forcefulness.[114]

Although the major function of a school board is to establish policies within the legal (statutory) and regulatory confines of its mandate, the line between policy-making and policy administration is often blurred, and a point of friction is likely to develop at the board table. This is where the professional advice of the administrative staff meets the sometimes politically motivated leanings of elected political officials. Giles and Proudfoot warn that the fight over the division of power between elected officials and civil servants can become counter productive, even harmful since the nature of the organizational climate has a profound effect upon the attitudes, beliefs, and motivation of those involved in the policy-making process, as well as the rest of the people who work there.[115] Another factor affecting organizational climate is, of course, the degree of leadership provided by the government-of-the-day with respect to education.

Politics and education. The twin threads that ran through the development of education, in Manitoba, from 1916 to 1959 were the demands for the organization of larger administrative units for secondary education, and for the improvement of the conditions and status of the teaching profession. But, as Wilson points out, beginning with the provincial government of Norris (1915-1922) each government thereafter modified its concept of the role of government in education, so that when Lorimer arrived in Winnipeg No.1

(1949), the government had largely abdicated its leadership role in education.[116]

The basic reasons for the failure of governments to provide leadership in education stemmed from the concept of role held by Norris's successors in the premiership regardless of their party affiliations. Successive governments after 1922 were overly devoted to economy, and their thinking was dominated by the attitudes of a rural society that had suffered a long depression. But when economic conditions began to improve, the government's mindset was incapable of change. With limited views of democracy and a passive view of the role of government and, above all, a legislature whose membership was predominantly rural in outlook and attitude, "it is not surprising," writes Wilson, "that the government provided no educational leadership."[117]

Dr. Ronald Oliver MacFarlane, a professor of history at the University of Manitoba, characterized the curriculum then in use as having been designed seventy-five years earlier for the instruction of children intended for the medical or teaching professions. The state of education in Manitoba became increasingly a matter of political contention, and it was largely on its educational record, or lack thereof, that the Liberal government of D. L. Campbell was defeated in 1958.[118]

It was Campbell's government, however, that created the Manitoba Royal Commission on Education, chaired by Dr. R.O.

MacFarlane, to examine all aspects of Manitoba's school system. The terms of reference of the Commission were as follows:

To study and report on all aspects of education in Manitoba, up to University level, and without limiting the generality of the foregoing, in particular to study and report on the following:

1. administration;
2. finance;
3. buildings and equipment
4. curriculum and standards;
5. supply, training, certification and terms of employment of teachers;
6. inspection and field services;
7. special groups, such as blind, deaf, physically and mentally handicapped;
8. official trustee and special schools;
9. school attendance and its enforcement; and
10. advisory and statutory boards and committees.[119]

In the time between the appointment of the Royal Commission in 1957 and the publication of the INTERIM REPORT in 1958 there was a change in government. In June 1958, the Liberal government of D.L. Campbell was replaced by the Progressive Conservative government of Duff Roblin who had campaigned vigorously on the issue of education.[120] Roblin was elected, and for the next nine years kept education on the forefront.

The Roblin government acted on the recommendations of the Commission's FINAL REPORT. Between 1959 and 1969, there were major curriculum changes. The old program of studies for secondary schools with its "General," "High School Leaving" and "Vocational" streams, was replaced by a broader program offering a "University Entrance Course." a "General Course"

and an "Occupational Entrance Course."[121] This provided more business and vocational training for students not continuing to university. In addition, as this was the mid-sixties, the government began to reappraise traditional curricula and to consider introducing more flexibility in the form of wider subject and option choices for secondary students. Thus, the removal of some of the system's structural deficiencies permitted and facilitated the growing notion of "equality of opportunity for all" that accompanied the dynamic growth of mass education in education in the sixties. The critical issues in education during this period increasingly became the provision of courses to serve individual differences and to heighten student motivation. By consolidating school districts and by replacing small schools with larger, better equipped "regional" schools, the government enabled school divisions like Winnipeg No.1 to introduce more diverse programs in order to meet more effectively the diverse needs of an enlarged school population.[122]

Since the political structure of a school board has a significant influence both on its operation and that of the school system, the superintendent must understand the political motivations (interests) of board members in order to lead effectively. As an agent of the school board, the superintendent is performance (results) oriented. His or her responsibility is to direct the school board, and ultimately the school system, toward the achievement of its stated purpose. Consequently, how the superintendent chooses to

work with trustees to achieve valued objectives is critical.[123] One might even suggest that how the superintendent works with the board members is usually more important than the power or status lodged in the position. Thus, credibility, suggest Kouzes and Posner (as the basis of a working relationship) can assume even greater value as a political resource than formal authority.[124]

Political structure of the school board. The political structure of the School Board of the School District of Winnipeg No.1 greatly concerned the members of the Reavis survey team, and the numerous individuals (school trustees, citizens, and teachers) who completed their survey questionnaires. Some further discussion on this matter is necessary to understand the political circumstances that Lorimer paid attention to.

In his biography of Joe Zuken, Joe Zuken: Citizen and Socialist (1990), Doug Smith describes the political composition of the School Board when Zuken became a member in 1942.

> Zuken was on the School Board for two decades. During that time the faces around the Board table were to change regularly, but the alignment of power remained constant. The Board was controlled by a loose majority of Liberals and Conservatives, most of whom ran with the backing of the Civic Election Committee (CEC), the political successor to the Citizens' Committee of one thousand, which had put down the General Strike. Facing them were four to five CCF trustees. These included a number of men who like Saul Cherniack, Philip Peturrson and David Orlikow, were to go on to national and provincial politics. There was a number of trade unionists (also members of the CCF)....And there was

> Zuken....Zuken was the only communist member. In 1947 he was joined by Margaret Chunn, who made electoral history by being the first of Winnipeg's civic communists to win an election outside of the North End's Ward Three.[125]

Lorimer described the Board politic this way:

> Winnipeg was a microcosm of western Canada not only politically but commercially as a result of the establishment early on of unions and of the Winnipeg General Strike which sharply divided the population between people on the left (CCF/Communist) and the people on the right (Liberals/Conservatives). In Winnipeg, Liberals and Conservatives joined together and they were called the Civic Election Committee (CEC). But the trustees were always careful to say they weren't Liberal or Conservative, they were CEC. I think that this was true of the City Council too. Party politics didn't play a part in the city government or the school systems in metropolitan Winnipeg. The CEC acted as a political party in seeking candidates for office and in helping to find candidates.[126]

And further:

> The Winnipeg School Board represented the political spectrum; it tended to be divided politically between the left and the right - the NDP and Communists on one side and the Liberals and Conservatives on the other side....The trustees tended to be on the whole, there are always some exceptions of course, but on the whole, tended to be progressive....For some years the division was 10 on the right and 5 on the left. It did change to 9 and 6 or 8 to 7.[127]

One might think that given the political structure of the Board, building political support for almost "any" proposal would have been an onerous task at best for Lorimer. His recollection was that there were like-minded members who organized campaigns and voted the same way, and "Individual trustees tended to adhere to their group when there were contentious matters on the table."[128] So, when Lorimer indicated during his interviews that "party politics" did

not play a part in Winnipeg No.1, he was most likely referring to the absence of traditional party labels in school politics. Suffice it to say at this point that Lorimer was able to build support for different endeavors, using specific strategies to be examined in chapter four. As a matter of interest, what was involved in becoming a school Board member?

The protocol for nomination and election of school board members indicated that any resident elector in an incorporated area could be a candidate for nomination and election as a school trustee provided he (or she) was a British subject by birth or naturalization; could read, write, and understand the provisions of The Public Schools Act; was twenty-one years old, and was not otherwise disqualified. In practical effect, the law placed responsibility on the voters of the School District for determining the desired qualifications of Board members in relation to their ability to render services to the schools which membership on the Board required.[129]

In view of the fact that the legal qualifications for school board membership were not especially high and that the selection by wards increased the risk of recruiting board members who were motivated solely by their own interests, the Reavis Report recommended that the method of selecting board members should be further safeguarded both through

legal and extralegal means.[130] The Report also identified a problem with the ward method of election.

The School Board of Winnipeg No.1 was divided into three wards, with five members in each ward. Members of each ward were selected by the constituents of the ward for election to the Winnipeg School Board. The result of course was that the School Board was selected on a political basis. Thus, the possibility existed that the Board's decision-making might be dominated by the politics of a single political entity interested in advancing its own agenda. Not surprisingly, therefore, when trustees were asked whether or not party politics were excluded from school elections, the unanimous response of the twelve trustees who participated in the survey was, No! The members of the Reavis survey team undoubtedly concluded that Board members' responsibilities would naturally be defined chiefly in terms of loyalty and concern for their respective wards, as was the situation in the United States.[131]

The School District of Winnipeg No.1 did not act on the recommendation of the Reavis Report to explore an alternative "best method for selecting board members," and the three-ward system was retained in its original form and purpose.

The ward system was retained because it worked in favour of those groups comprising Winnipeg's increasingly pluralistic society. Put simply, the concerns and aspirations of the

different groups residing in the City were brought forward by their representatives at Board meetings. But the real reason why the ward system worked, despite the misgivings of Reavis and his team, was because the trustees recognized that their duty was to all children and to the community at large. As Lorimer indicates here, the Board's enlightened, progressive, system-wide view of education overcame members' parochial interests.

> The important thing was in recognizing where education was going after the War in the late 40s and then 50s, that education was being recognized more and more as basic to the development of an individual's full potential, and so the basic philosophy on which the Board operated on was the general improvement of education for all categories of students.[132]

To ensure that the instructional program of Winnipeg No.1 continued to serve efficiently the needs of the community in the long-term, the Reavis Report recommended that the Board seek the wisdom and counsel of their superintendent.

> The successful administration of a school system requires that the relations of the superintendent and his board be that of a responsible executive to a board of directors who exercises legislative and judicial responsibilities. Where this relationship exists a board meeting should be given over very largely to the consideration of recommendations submitted by the superintendent and to hearing and passing judgment on reports of executive actions....but no action should be taken...which affect in any way the educational program without the approval of the superintendent.[133]

Ideally, school superintendents ought to be apolitical. A superintendent's longevity and success depends on his/her ability to understand the political constitution of his/her school board and use that knowledge to facilitate the

division's instructional program, by getting the school board to approve the policy proposals he/she or others formulate. School superintendents do not last very long when they are seen to be inefficient by their political masters. Lorimer served as Superintendent of Winnipeg No.1 from 1953 to 1966. One might suggest, therefore, that during Lorimer's thirteen years as superintendent, there was consensus between the "left" and the "right" side of the Board on the value of education as its agenda.

Economic Circumstances

As Superintendent and CEO of the School Board of the School District of Winnipeg No.1, Lorimer was responsible for directing the preparation of the budget. Section 1.1 - Duties of the Superintendent, Code of Rules and Regulations (adopted 1954, revised in 1958 and 1961) states:

> Without in any way restricting the generality of the foregoing the superintendent shall:
>
> 5. Direct the preparation of the budget.[134]

The budget is an educational plan. It is a plan for the fiscal operations of a school district or division that includes an estimate of proposed expenditures for a given period of time (usually one year), and a plan for financing the proposed expenditures. In order to prepare a well-conceived budget, decisions (political) must be made with respect to the general purposes, objectives, and goals of the school jurisdiction, including provisions for the re-assessment of the validity and attainability of previously

accepted objectives. The superintendent may pose recommendations to the school board respecting changes to the budget, but it is the school board that is authorized to enact the budget on behalf of the community. Similarly, it is up to the school board to decide such controversial issues as cutting or increasing the budget, reducing services, raising school taxes, or closing schools.[135]

A well-prepared budget requires a thorough assessment of new government initiatives as well as social, political, and especially the economic circumstances of the school district or division (past and present). And, in order to provide a quality education, there was the question of how much should be spent on public education. Superintendents who are responsible for preparing the budget might begin by assessing the state of the national economy.

The national economy. The post-Second World War era in Canada until the early 1970s was a period of remarkable economic growth and prosperity for Canada. According to Bumsted, Canadian production and consumption moved steadily upwards, employment rose almost continuously (except in 1945, 1954, and 1958), inflation was steady but not excessive, and interest rates seldom rose into double-digit figures.[136]

Between 1946 and the early 1970s, per-capita income doubled, even allowing for inflation. Unemployment never climbed above 7.5 percent of the total work force until 1976, and

typically ran well below it, despite the constant increase of new workers who nearly doubled the work-force in the quarter-century after the end of the war. Economic booms occurred in the late 1940s and again in the 1960s, both fuelled by export sales and investments in domestic physical plant.[137]

However, as Bumsted points out, the general pattern of affluence was neither solely attributable to government planning nor distinctive to Canada; rather, it was general across the Western industrial world. It started, in part, with the rebuilding of the war-torn economies of Europe and Asia, but continued on its own inertia after those systems had been put back into operation.[138]

Canada during the period 1946 to 1972 encouraged foreign trade as an important component of its economy. After 1950, Canada began to run a trading deficit, because Canadians chose to consume more than they produced, and financed growth by borrowing capital from abroad and by encouraging a direct foreign investment, primarily from the United States. Not surprisingly, the outstanding development of the period was the entrenchment of Canada's integration into the American trading market and the corresponding decline of Britain as a trading partner. For example, in 1946 Britain received 26% of Canadian exports and provided 7.5% of imports. In contrast, the United States took 38% of exports and supplied 75% of imports. By the early 1970s, America was

still supplying over 70% of imports and Britain less than 5%. The shift came about as a result of Britain's relative decline as an industrial power, joined after 1965 by a relatively open North American border in automobiles and automotive parts. At about this time, Russia, China, the European Common market, and Japan all became important trading partners, particularly with respect to the sale of wheat and raw materials.[139]

The other important particular concerned the value of the Canadian dollar. During the post-Second World War period the Canadian government set the value of the Canadian dollar in terms of the American dollar. In 1946, for example, the exchange rate was $1.10 Canadian for $1.00 American, and then it remained at par until 1949. In 1950 the Canadian government floated the dollar, and in 1962 its official value was set at $0.925 American, where it remained until 1970.[140] At the same time Canada's monetary policy increased the supply of money in circulation substantially faster than the GNP was rising, thus contributing to inflation. Double-digit inflation did not become a reality, however, until the mid 1970s. So for the period 1946 to about 1972, Canadian society enjoyed growth and prosperity.[141] But, what was the economic situation in Manitoba during Lorimer's leadership career?

The economy in Manitoba. Lorimer steadfastly maintained during his interviews that an impediment to educational

progress was lack of money. Undoubtedly, Lorimer was referring to the fact that the adequacy of revenues is dependent upon the demand for increased services. Hence the real issue for the government (or a school board) is the degree of difficulty of the matching/choices between revenues and demands for expenditures. Yet, at $0.925 (American)[142], the Canadian dollar for the period of his leadership career in the School District of Winnipeg No.1 was far healthier than it is today. When Lorimer resigned as Superintendent in 1966, the province's record of economic development was the most favourable in Manitoba's history prior to 1970.[143]

Earl reviewed the economic situation in the province of Manitoba for the period 1870 to 1967 and found that it was situated "dead center" between the "haves" and the "have-nots". In relation to the other prairie-provinces it could be argued that Manitoba was the "weak sister" of the trio. The economies of Alberta and Saskatchewan, and Manitoba have followed divergent paths. With the discovery of the Leduc field (1948), Alberta has been flowing in oil, and with the discovery of natural gas, the province found ready export markets which resulted in huge cash reserves.[144]

Saskatchewan also had some oil; in addition exceptional grain crops, ready markets and high export sales boosted the province's income levels. Meanwhile, the growth of industrial mining, particularly potash, continued to expand

during the 1960s. Manitoba, however, did not enjoy the advantage of money producing resources until the late 1970s, with the sale of hydroelectric power to the southern system. Although the economic position of Manitoba was not quite so bright as Alberta and Saskatchewan, the province did make significant gains.[145]

For example in 1966, the gross provincial income, as reported by provincial treasurer Gurney Evans in his budget speech that announced the 5% sales tax, rose 7% to reach a record of $2,640 million.[146]

Personal income increased 7 percent, edging $2 billion, with labour income recording a 9 percent jump to $1.2 billion. And mineral production at $182.03 million was the only field of production that did not reach expected levels and this was because of labour shortages at critical stages of production. And powered by a capital investment boom new capital investment in Manitoba in 1966 was approaching $627 million, an advance of 12 percent over the previous year, and new capital investment in industry recorded a 44 percent rise to $64 million. According to Earl, total private and public investment, with capital repair expenditures added, rose more than 10 percent to $825 million.[147]

For the fiscal year 1967-68, about $68.6 million was spent on direct government account for capital purposes. In this program, education had first priority - $26 million was allocated for schools, university and college building

projects.[148] In other words, education had become the provincial government's greatest expenditure.

The role of the federal government. For many provinces a major source of revenue was and is transfers from the federal government. In fact, there are many programs in Canada through which the federal government transfers money to the provinces. For example, the Canadian Assistance Plan provides federal funds to provinces as a share of the cost of social services, such as welfare. The federal government assumed, and continues to assume, financial responsibility for the education of Canada's Aboriginal people, for the children of servicemen and women, and for vocational and technical education (training).

Additionally, in 1959, the Federal Government began to pay the salaries of those members of the Guidance Clinic who provided the central administration, consultation, professional supervisory services for field workers, and psychiatric services by means of Federal Mental Health Grants supplemented by a direct provincial grant. One might conclude therefore that the Federal Government after 1959 was more inclined to accommodate an expansionist agenda towards education through its granting system.[149]

The provincial role. Provincial governments provide financial support for education just as they do for other services, such as health. In Manitoba, these funds are usually drawn from the general revenue of the province,

which includes all the revenue that the province collects through sales taxes, property taxes, fees of various kinds, taxes on products such as gasoline, tobacco, or alcohol, and its share of income tax. Federal transfers are a very important source of revenue also, especially for the less wealthy provinces of Canada.[150]

In Manitoba, the government determines as part of its annual budget how much money it will spend on education in that year, just as it does for any other service. The budget process generally involves the provincial Cabinet deciding how much money is available and how much of what is available should go to education. In determining how much revenue should be allocated to a particular area of expenditure, ministers must not only estimate the revenue from existing sources, but also must determine if changes need to be made to any tax rates, which will further alter revenue. At the same time, ministers have to consider various public priorities for services, the built-in increases in costs (such as inflation), and the government's own beliefs and commitments espoused in election promises.

A second major change in education stemming from the REPORT OF THE MANITOBA ROYAL COMMISSION ON EDUCATION was the introduction of a new system of government grants. In Winnipeg No.1, the proportion of provincial support rose from 19% in 1958 to 21% in 1959.[151] The important effect of the change in the so-called "teachers' grants" was their

relation to teachers' salaries. Beginning in 1947, an authorized teacher grant was introduced by the Liberal Party (in coalition). Each municipality levied five mills on its balanced assessment; the difference between the amount so raised and $1,400 was paid for each authorized teacher. (This grant also marked the beginning of "equalization payments".) A teacher was authorized for every thirty elementary students and for every twenty-five secondary students. There were also some minor grants for libraries and hot lunches. The authorized teacher grant continued until 1959 as the main basis for provincial support. Beginning on April 1, 1959, a salary schedule for Manitoba based on years of experience and teachers' qualifications was established and the tax levy was raised to eight mills. However, larger grants were allocated to secondary teachers than elementary teachers.[152]

In addition to the authorized salary schedule for teachers, which actually represented a re-classification of teachers in society (making teaching more competitive in income with other professions), supplementary grants were provided for maintenance, transportation, supplies, libraries, textbooks, and capital developments, such as the construction of new schools.[153]

After 1959, there is little doubt that education was the highest priority of the Roblin government. By 1969, before medicare was fully operational, spending on education

accounted for 30% of total provincial spending. It is now about 20%.[154] Thus, the provincial government, and indeed the School Board of Winnipeg No.1, were both inclined to accommodate an expansionist agenda regarding education. If education was the Roblin government's highest priority, one might expect to see some important changes with respect to capital funding.

Capital, explain Young and Levin, refers to such things as buildings, and major pieces of equipment. Most provinces fund school buildings (either new or renovated) through a separate funding process. School districts must submit proposals justifying their requests to build schools or to renovate some of the better older buildings, or to add additions to existing schools. Provincial governments then approve or reject such proposals on a case-by-case basis. Once approval is given, provinces apply a set of standards to the proposal to determine what can be included in the building, and how much the province will contribute. According to Levin and Young, when a proposal for a new school is approved, the province pays most or all of the cost, depending on the policy in each province, up to a specified level.[155] But did Premier Roblin's positive attitude towards education translate into larger capital grants for the school building program of Winnipeg No.1?

In fact, capital grants to Winnipeg No.1 did increase, but not as much as Lorimer had hoped. In the ANNUAL REPORT FOR

THE YEAR 1959, Lorimer reported that the payment of capital grants had been expanded from 40% of a maximum of $15,000 per classroom to 75% in secondary schools of over 12 rooms. Though he conceded that the expansion of capital funding would do much to shift the cost of school construction from owners of real property to all taxpayers, the need for approval of ratepayers for the total cost of the building program persisted, because the grants were available for debt payments rather than cash sums.[156] In short, monies acquired through school tax levies would be needed to make up the shortfall in capital grants from the provincial government. As well, additional monies would be needed to cover expenditures for operating and capital funding purposes.

The role of the school board. In Manitoba, both the province and school divisions raise money for education through property taxes. In 1953, Winnipeg No.1's school tax levy was $6,686,000.00, as compared to government grants in the amount of $1,036,833.94.[157] In 1966 as Lorimer was preparing to leave the School Division, the total school tax levy was $18,645,200.00, and provincial government grants amounted to $4,040,795.00. The municipal school tax levy in 1966 accounted for 80.9% of total revenue, and provincial grants accounted for 17.5% of total revenue. During 1966, the operations of The Winnipeg school Division No.1 involved the expenditure of more than $25,850,000.00 for Current Operating and Capital Fund purposes. About $23,100,000.00

was spent on Current Account for staffing, servicing, and maintaining the 79 schools under the jurisdiction of the Division. About $2,750,000,00 was spent on Capital Account projects which included new buildings, additions to existing buildings, equipment and the purchase of school sites.[158]
In contrast to the federal and provincial governments, which have a wide variety of tax sources, school boards raise funds almost entirely from taxes on property. But school boards like provincial governments must determine whether an increase in mill rate (school tax levy: X number of mills on an estimated realty assessment of X number of millions of dollars) is warranted. Hence school trustees wrestle not only with factors such as increased pupil enrolment, devaluation of the dollar, increased cost of living, higher operating costs and the demand by citizens for more services, but also with their expanded role as the main source for social mobility. But, there is no simple way of making these decisions, which have to do with the conflict between the desire to keep taxation levels reasonable, and the desire to have services that are of the highest quality. Both desires were and continue to be political objectives that past, present, and future school boards must balance in some way.

The total value of all property in a given jurisdiction, whether a school district or a province, is the basis on which property taxes are levied. A school district has the right to requisition from the municipal council, which then

levies a mill rate. A municipality will charge taxes at so many *mills*, with a mill meaning $1.00 in tax for every $1,000.00 of assessed value. In some cases the assessment of property is done by school divisions/districts, while in other cases it is province-wide based on provincially determined criteria. So, in 1966 the school tax levy of $18,645,200.00 represented the direct realty tax paid by the taxpayers (which in 1966 was 34.464 mills) on an estimated realty assessment of $541,004,770.00.[159] A school board can obtain the same amount of revenue regardless of the actual assessment of the property simply by changing the mill rate; to the property owner, a higher mill rate on a lower assessment can mean the same thing as a lower mill rate on a higher assessment. And this is why, suggest Levin and Young, the actual assessed value of any single property does not matter, but fairness in assessment across properties does.[160]

In order to determine how much money a school division/district requires from one year to the next, past and current spending levels are compared. The most frequent measure used for such a comparison was (and continues to be) spending per pupil. Spending per pupil is essentially the total amount spent on education divided by the total number of students. In the School District of Winnipeg No.1, the Cost Per Pupil in 1953 was $221.75.[161] In 1964, the Cost Per Pupil was $405.41, an increase of $183.66 over a period of eleven years.[162]

Seizing opportunities is an important activity of leaders; one might speculate that Lorimer and other like-minded superintendents in their respective districts/divisions would probably have kept an eye on the national and provincial economic situations in order to determine the amount of flexibility available in spending, based on their perception of the capacity of each government to bear additional expenditures in light of economic growth and prosperity during the post-second World War era.

The economic circumstances for the period of Lorimer's incumbency were quite favourable. The economy was booming, there was money to spend, there was growth, there was optimism, and education had become the preferred expenditure category of the provincial government.

Conclusion

This chapter examined the contextual circumstance at work in The Winnipeg School Division No.1 from 1949 to 1966. The demographic circumstance of primary importance was the unanticipated increase in pupil enrolment resulting from the baby boom after World War II. Acting on the recommendation of the Reavis Report to implement a school building program, Lorimer led the way to find 26.7 million dollars to build 24 new schools in Winnipeg No.1. A second Reavis Report recommendation initiated an aggressive campaign of teacher recruitment, both in Canada and in Great Britain, needed to

serve the educational needs of Winnipeg No.1's increased student population.

The institutional circumstance of primary importance was the School Board's decision to follow the advice of the Reavis Report and switch from a multiple type of organization to a unitary type school organization in which responsibility for the entire school operation would be centralized in the superintendent. The change in organizational structure would facilitate the controlled adaptation of the school system in light of changing conditions in society, allowing the school system to operate more efficiently and to better serve the needs of students. The switch in organizational structure necessitated the development of a Code of Rules and Regulations. Lorimer was assigned the task of developing the new Code with which to coordinate the efforts of all to achieve the institutional purpose of Winnipeg No.1. He began in 1949 and the new Code was adopted in 1954.

The change in institutional circumstances of Winnipeg No.1, suggested in the Reavis Report, also mandated a change in the relationship that existed between the superintendent and the School Board. As superintendent of schools in 1952-53, Lorimer was responsible not only for the operation and success of the school system, but also for formulating policies to bring forward to the Board for its approval. Lorimer was to be the educational leader and assist Board members to better understand the needs of students and the

value of education. The Reavis Report recommended that the superintendent's relationship to the Board should be analogous to that of a chief executive officer towards a board of directors who wield legislative powers. Lorimer understood the political dynamics at work among Board members, but he himself adopted a non-political stance. By working with the Board instead of at cross-purpose, Lorimer was able to unite Board members in their view towards the value of education. The value of education was further enhanced in 1958 when Duff Roblin was elected premier of Manitoba. He began to implement the recommendations of the REPORT OF THE MANITOBA ROYAL COMMISSION ON EDUCATION, and he made education the priority of his government.

By all accounts the socio-cultural circumstances in the City of Winnipeg were constantly improving throughout the period of Lorimer's incumbency. It was a good time to be a school administrator, because society valued education and educational administrators. No doubt Manitoba's economic prosperity during the period of Lorimer's incumbency was in large part responsible for Manitobans' favourable disposition towards education and educators.

From an economic standpoint, Manitoba was riding the crest of an economic boom. After 1959, education and spending on education was the Roblin government's highest priority. By 1969, spending on education accounted for 30% of total provincial spending. Thus the provincial government and the

School Board of Winnipeg No.1 were able to support an expansionist agenda regarding education. In fact of all the school systems in Manitoba, Winnipeg No.1 had the largest tax base.

NOTES TO CHAPTER 3

[1] School District of Winnipeg No.1. Board Minute Book No. 14. Regular Meeting, The School Board, Winnipeg, Manitoba, 19 February, 1946.

[2] School District of Winnipeg No.1. Board Minute Book No. 15. Regular Meeting, The School Board, Winnipeg, Manitoba, 16 September, 1947.

[3] Chafe, J. (1967). An Apple for the Teacher: A Centennial History of the Winnipeg School Division. Winnipeg: Hignell Printing Ltd, 150.

[4] Reavis, W.C. (Chair) (1948). Report of the Directed Self Survey Winnipeg Public Schools. Chicago: University of Chicago, 11.

[5] Wesley C. Lorimer, interview with author, 3 September, 1999.

[6] Pincock, J.C. (1948). Address to the Chairman and Members of the Board of School Trustees, School District of Winnipeg No.1., Report of the Directed Self Survey, Winnipeg Public Schools. Chicago: University of Chicago, September., v-vi.

[7] Chafe, 115-114.

[8] Lucow, W. (1950). The origin and growth of the public school system in Winnipeg. Unpublished Master of Education thesis, University of Manitoba, 79.

[9] Lucow, 34.

[10] Reavis, vii.

[11] Chafe, 150.

[12] Macleod, G. (1948). Report of the Directed Self Survey Winnipeg Public Schools. Chicago: University of Chicago. Foreword.

[13] Chafe, 143-144.

[14] The directors of the Reavis survey team were as follows: Ralph W. Tyler, Professor of Education and formerly Chairman of the Department of Education, University of Chicago; William S. Gray, Professor of Education, University of Chicago; Robert C. Woellner, Assistant Professor of Education, University of Chicago; Dan H. Cooper, Assistant Professor of Education, University of Chicago; Bertrand L. Smith, Superintendent of Schools, Oak Park, Illonois; and Robert White, Dean of School of Education, Kent State University, Kent, Ohio.

[15] Reavis, Foreword.

[16] Reavis, 34.

[17] School District of Winnipeg No.1. Board Minute Book No.15. Special Meeting of the School Board, Winnipeg, Manitoba, 5 October, 1948.

[18] School District of Winnipeg No.1. Board Minute Book No.15. Special Meeting of the School Board, Winnipeg, Manitoba, 8 October, 1948.

[19] Wesley C. Lorimer, interview with author, 1 September, 1999.

[20] Reavis, 58.

[21] Ibid.

[22] The Winnipeg School Division No.1. ANNUAL REPORT FOR THE YEAR 1961. Winnipeg: The Winnipeg School Division No.1.

[23] Ibid.

[24] Lorimer, W. (1987). Teachers were Scarce in 1949. Education Manitoba. (May/June). 18.

[25] School District Of Winnipeg No.1. ANNUAL REPORT FOR THE YEAR 1953. Winnipeg: School District of Winnipeg No.1. 2.

[26] Chafe, 157.

[27] Chafe, 159.

[28] The Winnipeg School Division No.1. ANNUAL REPORT FOR THE YEAR 1966. Winnipeg: The Winnipeg School Division No.1.

[29] The Winnipeg School Division No.1. ANNUAL REPORT FOR THE YEAR 1961. Winnipeg: The Winnipeg School Division No.1. 7-8.

[30] Chafe, 155.

[31] The Winnipeg School Division No.1. ANNUAL REPORT FOR THE YEAR 1961. Winnipeg: The Winnipeg School Division No.1. 6.

[32] Ibid.

[33] The Winnipeg School Division No.1. ANNUAL REPORT OF THE TRUSTEES FOR THE YEAR ENDED 1964. Winnipeg: The Winnipeg School Division No.1. 11. Previously, students who had completed grade XI were allowed to attend university.

[34] School District Of Winnipeg No.1. ANNUAL REPORT FOR THE YEAR 1956. Winnipeg: School District of Winnipeg No.1. 2.

[35] Lorimer, W. (1987). Teachers were scarce in 1949. (May/June) Education Manitoba. 18.

[36] Lucow, 49.

[37] Lucow, 49-50.

[38] Chafe, 164.

[39] Reavis, 110.

[40] Ibid.

[41] The Winnipeg School Division No.1. ANNUAL REPORT OF THE TRUSTEES FOR THE YEAR ENDED 1962. Winnipeg: The Winnipeg School Division No.1, 6.

[42] Reavis, 55.

[43] Ibid.

[44] Ibid.

[45] Ibid.

[46] Chafe, 150.

[47] School District of Winnipeg No.1, By-Law No. 429 (1949). Any amendments to a money by-law had to be approved by the Municipal and Public Utility Board. In order to pay off the debt within the allotted time period of twenty or more years, a designated sum of money was raised annually during the term of the debentures, by special rate upon the rateable property of the District/Division, for the purpose of providing a Sinking Fund for the payment of the principal sum of the debentures. The annual sums, however, had to be sufficient so that the aggregate together with the interest, to be compounded annually, was sufficient at the due date of any debenture issued (under the by-law) to retire the principal sum of the debentures. As to the payment of the interest, an additional sum had to be raised annually by special rate imposed upon the District's rateable property, sufficient to pay the interest upon the debentures as and when it became due.

[48] The Winnipeg School Division No.1. ANNUAL REPORT FOR THE YEAR 1959. Winnipeg: The Winnipeg School Division No.1. 2.

[49] The Winnipeg School Division No.1. ANNUAL REPORT OF THE TRUSTEES FOR THE YEAR ENDED 1964. Winnipeg: The Winnipeg School Division No.1. 22.

[50] The Winnipeg Tribune, 10 December, 1966.

[51] Chafe, 155-160. New schools built from 1949 to 1966 included: River Heights School (1949), Weston School (1949), Sargent Park School (1949), Inkster School (1949), Shaughnessy Park (1950),

Brock Corydon (1950), Ashland School (1951), Robertson School (1951), Argyle School (1951), George V School Number 2 (1951), Technical-Vocational High School (1951), Kent Road School (1952), Harrow School (1952), Carpathia School (1952-53), Montrose School (1954), Lansdowne School (1954), Andrew Mynarski School (1954), William Osler School (1955), Norquay School Number 2 (1955), J.B. Mitchell (1956), John Dafoe School (1957), Sisler School (1957), Elmwood High (1958), and Grant Park High School (1959).

[52] Department of Justice, Canada, (1986 0101). The Constitution Acts 1867 to 1982. Ottawa: Minister of Supply and Services.

[53] Ibid.

[54] Lucow, H. (1950). The Origin and Growth of the Public School System in Winnipeg. Unpublished master's thesis, University of Manitoba.

[55] Jaenen C. (1984, Spring), The history of French in Manitoba: Local initiative or external imposition. Language and Society. 12. Understandably, The Public Schools Act of 1894 was bitterly contested. Catholic French Manitobans had not only been denied official status for their language but, in addition, had also been denied the right of sending their children to a denominational school, a constitutional guarantee that they had under Section 22 of The Manitoba Act of 1870, which had assured not only a Catholic education but a French Catholic one.

[56] Ibid.

[57] Young, J. and Levin, B. (1998). Understanding Canadian Schools: An Introduction to Educational Administration (2nd ed.). Toronto, Ontario: Harcourt Brace & Company, Canada.

[58] Ibid.

[59] Giles, T. and Proudfoot, A. (1990). Educational Administration in Canada. (4th ed.). Calgary, Alberta: Detselig Enterprises Ltd.

[60] Giles and Proudfoot, 42-43.

[61] Giles and Proudfoot, 43.

[62] Giles and Proudfoot, 55.

[63] Province of Manitoba. An Act Respecting The Department of Education. (1954). Revised Statutes of Manitoba, Chapter 67. Winnipeg: Queen's Printer, 1013.

[64] Province of Manitoba. An Act Respecting The Department of Education. (1954). Revised Statutes of Manitoba, Chapter 67. Winnipeg: Queen's Printer, 1014.

[65] Province of Manitoba. An Act Respecting The Department of Education. (1954). Revised Statutes of Manitoba, Chapter 67. Winnipeg: Queen's Printer, 1014-1023.

[66] Giles and Proudfoot, 61-62.

[67] Young, J. and Levin, B. (1998). Understanding Canadian Schools: An Introduction to Educational Administration. (2nd ed.) Toronto: Harcourt Brace & Company, Canada.

[68] Province of Manitoba. The Public Schools Act, Part VI - Cap. 215, (1954), Revised Statutes of Manitoba. Winnipeg: Queen's Printer. 995-1005.

[69] Province of Manitoba. The Public Schools Act, Part V1 - Cap. 215, (1954), Revised Statutes of Manitoba. Winnipeg: Queen's Printer. 1005-1007.

[70] Reavis, 15.

[71] Ibid.

[72] Reavis, 17.

[73] Reavis, 11.

[74] Reavis, 28.

[75] Reavis, 27.

[76] Reavis, 19-28.

[77] Reavis, 27-28.

[78] School District of Winnipeg No.1. Code of Rules and Regulations (1954). Winnipeg: School District of Winnipeg No.1.

[79] School District of Winnipeg No.1. Board Minute Book No. 16. Regular Meeting, The School Board, Winnipeg, Manitoba, 31 March, 1953.

[80] Code of Rules and Regulations, 4.

[81] Code of Rules and Regulations., 4-5.

[82] The Superintendency: A Resource Document. The Manitoba Association of School Trustees and The Manitoba Association of School Superintendents. Winnipeg, Manitoba. This document was developed by the Joint Committee on the Superintendency, as established in 1990 by the Manitoba Association of School Trustees and the Manitoba Association of School Superintendents to assist school boards and senior administrators (of unitary school divisions) in establishing and maintaining effective working relationships to meet the

evolving needs of the communities which they serve.

[83] School District of Winnipeg No.1. ANNUAL REPORT FOR THE YEAR 1947. Winnipeg: School District of Winnipeg No.1.

[84] School District of Winnipeg No.1. ANNUAL REPORT FOR THE YEAR 1954. Winnipeg: School District of Winnipeg No.1.

[85] The Winnipeg School Division No.1. ANNUAL REPORT OF THE TRUSTEES FOR THE YEAR ENDED 1963. Winnipeg: The Winnipeg School Division No.1.

[86] School District of Winnipeg No.1. BY-LAW No. 333. Winnipeg: School District of Winnipeg No.1.

[87] School District of Winnipeg No.1, ANNUAL REPORT FOR THE YEAR 1958. Winnipeg: School District of Winnipeg No.1.

[88] Code of Rules and Regulations., 7.

[89] Lucow, 29-30.

[90] Lucow, 99.

[91] Chafe, 148.

[92] Porter, J. (1967). The Human Community. In J. Careless and C. Brown (Eds.). The Canadians 1867 - 1967. Toronto: The Macmillan Co. of Canada Ltd, 385 - 409.

[93] Chafe, 147-148.

[94] Artibise, A. (1977). Winnipeg: An Illustrated History. Toronto, ON: James Lorimer & Company, Publishers, pp. 190-194. It was H. Mardon, in "Accounting for the Arts in Winnipeg," *Westworld*, Vol.2, No.6 (Nov.-Dec. 1976), p.7 who commented on Winnipeg's cultural status in relation to other Canadian cities.

[95] Porter, 399-404.

[96] Porter, 403.

[97] Chafe, 57.

[98] Porter, 399.

[99] Artibise, 46.

[100] Artibise, A. (1975). Winnipeg: A Social History of Urban Growth 1874 - 1914. Montreal: McGill-Queen's University Press.

[101] Artibise, 202.

[102] Artibise, 202-206.

[103] Artibise, 206.

[104] Chafe, 123.

[105] Chafe, 63.

[106] School District of Winnipeg No.1, ANNUAL REPORT FOR THE YEAR 1956. Winnipeg: School District of Winnipeg No.1. 1.

[107] Chafe, 179.

[108] Chafe, 180.

[109] The Winnipeg School Division No.1. ANNUAL REPORT 1966. Winnipeg: The Winnipeg School Division No.1. 3.

[110] Code of Rules and Regulations, 2-3.

[111] Giles and Proudfoot, 64.

[112] Presthus, R. (1972). Elite Accommodation in Canadian Politics. Toronto: MacMillan of Canada Ltd.

[113] Dahl, R. (1976). Modern Political Analysis (3rd ed.). Englewood Cliffs, NJ: Prentice-Hall Inc.

[114] Duff Roblin, interview with author, 24 September, 1999.

[115] Giles and Proudfoot, 65.

[116] Wilson, K. (1967). The Development of Education in Manitoba. Unpublished doctoral thesis, Michigan State University.

[117] Wilson, 388.

[118] Ibid.

[119] Province of Manitoba. Report of the Manitoba Royal Commission on Education. Winnipeg: Queen's Printer.

[120] Wilson, 340.

[121] Manitoba, Department of Education, Administrative Handbook Grades 9-12 (1968-1969). Winnipeg: Queen's Printer.

[122] Bueti, V.J. (1980). The Educational Policies of the New Democratic Party Government of Manitoba, 1969-1975. Unpublished master's thesis, University of Manitoba.

[123] Giles et al., 67.

[124] Kouzes, J. and Posner, B. (1987). The Leadership Challenge: How to Get Extraordinary Things Done in Organizations. San Francisco, CA: Jossey-Bass Inc. Publishers.

[125] Smith, D. (1990). Joe Zuken: Citizen and Socialist. Toronto, On: James Lorimer & Company. The General Strike in Winnipeg (1918-19) was carried out in the name of strict trade union goals, principally the right to negotiate; it was viewed as near revolution by the city fathers. That many of the strike leaders expressed their support for the 1917 Rusian Revolution and had participated in the establishment of the One Big Union just weeks before the strike broke out, did nothing to ease their fears. The Citizens' Committee of One Thousand brought together many leaders of the local business community to suppress the strike. The Committee's position was that no government employee should be allowed to be a member of a union having an affiliation with an outside organization.

[126] Wesley C. Lorimer, interview with author, 9 September, 1999.

[127] Wesley C. Lorimer, interview with author, 1 September, 1999.

[128] Wesley C. Lorimer, interview with author, 1 September, 1999.

[129] Reavis, 4.

[130] Ibid.

[131] Reavis, 5.

[132] Wesley C. Lorimer, interview with author, 1 September, 1999.

[133] Reavis, 27-28.

[134] The Winnipeg School Division No.1. Code of Rules and Regulations. Winnipeg: The Winnipeg School Division No.1. 4-5.

[135] Giles and Proudfoot, 90-91.

[136] Bumsted, J. (1992). The Peoples of Canada: A Post-Confederation History. Toronto: Oxford University Press.

[137] Bumsted, 276.

[138] Ibid.

[139] Bumsted, 277.

[140] Bumsted, 278.

[141] Ibid.

[142] Ibid.

[143] Earl, W. (1967). Locked Between the Haves and Have Nots. Western Business & Industry, Vol. 41. No. 3 (March). 22-23 & 38-39.

[144] Earl, 22.

[145] Ibid.

[146] Earl, 23.

[147] Earl, 23 & 38.

[148] Earl, 39.

[149] The Winnipeg School Division No.1. ANNUAL REPORT FOR THE YEAR 1959. Winnipeg: The Winnipeg School Division No.1, 33.

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[153] Ibid.

[154] Levin and Young, 150.

[155] Levin and Young, 146.

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[157] School District of Winnipeg No.1. ANNUAL REPORT FOR THE YEAR 1953. Winnipeg: School District of Winnipeg No.1. 57.

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CHAPTER 4

INCUMBENCY, 1949-1966

The purpose of this chapter is to illustrate the relevance of Terry's model to the interpretation of one administrator's leadership performance. The main concern in this chapter is to determine whether the leadership behaviour of Dr. Wesley C. Lorimer matched the behavioural pattern of conservators in relation to the three functions they perform to preserve institutional integrity: conserving mission, conserving values, and conserving support. Data sources used were interviews and documents.

Conserving Mission

The mission of public bureaucracies and, indeed, public school systems in Manitoba is defined by legislation. In Manitoba, the relevant mandating statute is The Public Schools Act. Terry argues that the concept of authority is central to the notion of conserving mission. Hence, administrative conservators are entrusted with the responsibility of preserving and nurturing authority embodied in statutes that determine the mission/mandate of a public school system, for example. Strategies for conserving mission focus on preserving the executive and non-executive authority accorded public agencies. A review of Terry's use of these terms is in order.

Executive authority involves the right and power to issue commands and to perform certain acts in a given realm. To be more precise, an executive authority has the power and right to act for and on someone else. In contrast, a non-executive authority lacks this right or power. Executive authority must be linked to a context or system such as a school division, established by a set of laws. Specific rules govern the context or system and, in turn, determine the scope and limits of executive authority. Strategies for preserving executive authority involve efforts to ensure that the agency's actions and activities do not violate the spirit (general intent of a statement or mandating statute) or letter of the law (actions or activities that comply with the meaning of the language used in a statement or mandating statute). Strategies for complying with the spirit and letter of the law include: the interpretation of legal mandates (The Public Schools Act) and the education of personnel.[1]

Lorimer was assigned to draft a new Code for the consideration of the Board (in 1949) to replace the outdated Operating BY-LAW No. 333 (1943), a process in which he was involved until 1954 when the new Code was adopted. Operating BY-LAW No. 333 regulated the proceedings of the Board and the duties of committees and officials in the School District of Winnipeg No.1. The new Code was not only an organizational and procedural document, but also a mandate and mission statement. An examination of the origin and

process involved with the establishment of a new Code facilitates an understanding both of "mission" and the authority of The Winnipeg School Division No.1 to educate its duly registered pupils.

Establishing a code of rules and regulations. The Reavis Report recommended that the School Board switch from a multiple type of school organization to a unit type of organization with the superintendent as the chief executive officer and the other executive officers functioning as his specialized administrative assistants. But first, the Board should relinquish its responsibility for coordinating the activities of its executive officers - all of whom were directly responsible to the Board - and put it into the hands of the superintendent. The Board agreed which would render the existing BY-LAW No.333 unsatisfactory for the efficient administration of a unit type of organization. In fact, when Lucow compared the duties of the superintendent as set out in the 1943 operating by-laws, which were still in effect in 1948, to those laid out by Dr. McIntyre fifty-seven years earlier in 1886 for a multiple type of organization, he found that they were "substantially" the same.[2] Consequently, the Reavis team recommended that a revision of the 1943 operating by-laws was required. What was needed for the efficient operation of its new school organization, therefore, was a formal arrangement; one in which all executive officers reported to the superintendent

instead of reporting (independently) to the Board. In other words, the activities of those responsible for the various branches of the Board's operations should be brought together and coordinated under one central authority, the superintendent, to ensure the efficient administration of the School Division.

The new Code would establish the superintendent as the individual responsible for managing and supervising all in such a way as to achieve the institutional purpose of the school system. The Code of Rules and Regulations would then be published in printed form and distributed to all employees and, on request, to citizens and persons having dealings with the schools.[3]

Most importantly, the Code of Rules and Regulations was not to conflict with The Public Schools Act; rather, its rules would be supplementary to the Act and to the Regulations of the Department of Education, both of which were in force in all schools. Hence, the Code ought to embody mandatory practices to be defined by the School Board to which the superintendent was obliged, under the law, to respond.

To ensure the satisfactory preparation of the Code of Rules and Regulations, the Reavis Report made the following suggestions. First, the existing rules and regulations prescribed in BY-LAW No.333 should be critically reconsidered to determine which policies still applied. Second, the proceedings of the Board should be analyzed for

previous actions that might serve as precedents or as policies. This would necessitate a comprehensive review of the "Minutes of the School Board of Winnipeg School Division No.1." These Minutes contained a complete record of the proceedings of the Board, including precedents or policies adopted in meeting new situations. An analysis of these "Minutes" would serve to reveal those administrative actions that had taken on the character of precedents and policies that ought to be considered in the formulation of the policies to be embodied in the first draft of proposed operating rules and regulations.[4]

Third, suggestions and criticisms of all employed personnel about the rules and regulations proposed by the Board and its executive officers should be solicited for the consideration of the Board. In this way all members of the School Division would be involved in the development of the Code, which in turn increased the likelihood that they would act in accordance with the Board's policies and instructions. And prior to its adoption, all proposals should be rechecked to make certain that responsibility was properly fixed with respect to the execution of the responsibilities established in the rules.[5]

From the very beginning of his career in Winnipeg No.1, Lorimer had expressed an interest in working on the implementation of the recommendations of the Reavis Report. His post-graduate training at Columbia and work-related

experiences in Saskatchewan afforded him a wide range of skills with which to prepare the Code. Thus, seen from the viewpoint both of the superintendent, Dr. Pincock, and the School Board, Lorimer was in all likelihood the best possible candidate for the job. One might also speculate that he wanted the job because he was ambitious. Developing a new Code afforded him an opportunity to show the Board that he was both capable and "results-oriented."

In the ANNUAL REPORT OF THE TRUSTEES FOR THE YEAR ENDED 1949 then superintendent Pincock noted that Lorimer in his capacity as research assistant to the Superintendent had begun the preparation of a Code for the school system as recommended by the Reavis Report. In his report, Pincock outlined the actual steps taken by Lorimer to prepare the Code:

> Dr. Lorimer has undertaken a number of activities. A beginning has been made on the preparation of a code for the school system as recommended by the Reavis Report; this has included securing and collecting practices in school systems of other cities in Canada and the United States, a study of Board policy as recorded in the minutes of Board and a systematic compilation of the same, examination of the present school system, and the rules and regulations governing the duties and responsibilities of executive officers, supervisors, principals, teachers, and the other employees of the Board. The project has been outlined to the teaching staff with a view to obtaining their assistance and co-operation.[6]

Lorimer examined the practices in the United States with respect to the powers and role of superintendents in unitary school divisions and discovered a practice unique to the appointment of American superintendents that served to

strengthen his resolve to ensure that administrative officials (school principals, for example) under his charge in Winnipeg No.1 were not only qualified to assume their duties, but also that they knew what the purpose of education was - before they were hired!

> You know the traditional pattern in some areas in the United States is--teacher, coach, superintendent. When I went to AASA (American Association of School Administrators) meetings in the States, I got to know some who followed that route. Typically, they were not from the big cities but from smaller centers. You know the general attitude in the US about athletics, especially football; so you get superintendents who are great coaches; some are great people but they may know next to nothing about the purposes of education and the relationship of education to the rational functioning of modern society....I think that senior people in a school system should have advanced qualifications because that broadens their minds. It focuses their attention on aspects of education that are not, so to say, part of the bread and butter or daily operation of the system....We expected at the very least, even in the beginning, that they would have a B.Ed. and as time went on and more people took the M.Ed., we considered that that was a desirable qualification as an indication of scholarship and an indication of having explored the whole gambit of education in their field.[7]

Lorimer also outlined the development of the Code to the Winnipeg Teachers' Association. When asked about this aspect of the Code's preparation, Lorimer replied:

> It was agreed by the Trustees that such a manual would be useful for the Winnipeg schools so I set about the task of preparing one. As with the money by-laws, it was clear that the best approach would be a cooperative one and this was the pattern that was followed. The establishment of the Code provided opportunities to propose new policies for the Board and for the Teachers' Association. In this activity there was helpful cooperation from both these bodies.[8]

As the individual largely responsible for the development of the new Code, Lorimer kept in mind that the establishment of the Code of Rules and Regulations placed all supervision and direction of the school system directly into the hands of the superintendent. In short, for the first time in the history of the School Division's institutional development, the superintendent was to be responsible (and accountable to the Board) for the efficient administration of the entire school system.

As a seasoned educator, professional decision-maker and educational leader in his own right, Lorimer understood that developing a restrictive code especially during a time of chaotic change could be

> a straight-jacket, so my job was to develop a Code of Rules which would indicate to principals and teachers what freedoms they had to do things. Much of these, a lot of people knew about but were not absolutely sure about, so the Code of Rules was not to be a straight-jacket, more a statement which would encourage people to do what they thought needed to be done within reasonable grounds.[9]

One might speculate that there were other reasons why Lorimer prepared a flexible rather than a restrictive Code. First, he surely did not want the very same instrument he had developed earlier to constrain his leadership later, should he be appointed superintendent.

For example, in creating a non-restrictive instrument, Lorimer sought to preserve and reinforce the administrative practice of nonpolitical management in the person of the superintendent. At the same time, he sought to ensure that

he had sufficient autonomy to protect the institutional boundaries of Winnipeg No.1, as established by the Code.

As recommended in the Reavis Report, the Board agreed to entrust the executive function of public school administration to the superintendent. In effect, the Board had agreed, in principle, to transform itself into a legislative body responsible for policy-making. Implementing policies approved by the Board was to be the responsibility of the superintendent. The advantage of this arrangement was that it afforded some protection for the system's institutional boundaries and jurisdiction, because it rendered revolutionary changes (in the administrative structure of the organization) by new boards or members difficult to make. One wonders, however, about the difficulty of upholding this neat division in practice.

Some might conclude, albeit erroneously, that Lorimer's objective in preparing a new Code was to further bureaucratize the system to enable the superintendent to manage and supervise the employees of the Board more efficiently through increased formalization. While some degree of formalization was of course necessary, Lorimer maintained throughout the course of his interviews that the rules stipulated in the Code were never meant to provide definitive answers to all questions of administrative policy and procedure. Rather.the rules contained in the Code would require intelligent study and interpretation in relation to

the educational needs of the community. In creating the Code as he did, Lorimer was in large part attempting to resolve a situation that was and is always present in school organizations.

In any school organization there are two different behaviour systems at work: a bureaucratic system and a professional system. As one who steadfastly maintained throughout his entire leadership career that a critical element in any educational program is the teacher,[10] it seemed reasonable to assume that Lorimer wanted to minimize conflict between the teachers (professionals) and the administration in Winnipeg No.1 in order to maximize agreement and thus productivity.

With respect to the school system as an organization, then, Lorimer emphasized authority in position, division of labour, specific behaviour appropriate for specified situations, and he defined procedures that were to be followed, as well as the consequences for inappropriate actions. With respect to teachers as professionals, he placed significant emphasis on the importance of satisfying the needs of the client (pupil), on improving the teacher's life on the job, on giving teachers more control over essential task decisions, and the responsibility for their achievement. But on the other hand, teachers were expected to accept increased responsibility; they were expected to have strong growth and achievement needs; they were expected

to have positive attitudes toward working with different agencies; they were expected to be tolerant, and they were expected to feel secure in their own personal abilities and qualities.[11]

The Code of Rules and Regulations was adopted by the Board in 1954; it established the authority of the administrative apparatus responsible for the operation of school system as well as the legal boundaries of its jurisdiction, which, in turn, afforded Lorimer the greatest extent of discretion possible to protect institutional boundaries.

The mission of Winnipeg No.1 is stated in Section 2.1 of the Code of Rules and Regulations (1961). It reads as follows:

> Purpose and Objectives of the Winnipeg
>
> Public Schools:
>
> The central purpose of the Winnipeg Public Schools shall be the preservation and extension of the democratic way of life and the development of each individual to his highest potentiality. To this end, the schools shall strive to develop in children the knowledge, skills, and habits, understandings, attitudes, and character traits that are essential for the sound choice of, and participation in, a vocation, and for responsible contributing citizenship. With respect to the individual, the outcomes to be achieved are the development of a sound moral character and appreciation of spiritual values, love of home and country, and a disciplined approach to the varied responsibilities of life. With respect to the individual and society, the outcomes to be achieved include respect for duly constituted authority, genuine concern for the rights of others regardless of race or creed, willingness to act in the interest of the general welfare, and a desire ever to improve in those competencies essential to effective social living.
>
> Realizing fully the great responsibility of the schools of the community in the pursuit of these objectives,

> the School Board believes that they can be satisfactorily achieved only with the full co-operation and support of all agencies of community life which share responsibility for the welfare and development of children and youth. Among these the responsibility of the home is primary. The development, therefore, of close relationships with these agencies, and, in particular, a home-school partnership of responsibility and effort, is a principal aim of the schools.[12]

Clearly, the mission statement not only authorized the school system to educate students, it also embodied many values and principles at work in democratic societies.

Strategies used for conserving mission focus on the executive and non-executive authority granted to public bureaucracies. Non-executive authority refers to the capacity of a public bureaucracy to do what it is mandated to do. In the case of Winnipeg No.1, we are especially interested in what Lorimer did to strengthen and preserve its capacity to continue to provide its students with "good" education in light of the need to accommodate the steady increase in pupil enrolment after 1945.

In order to provide pupils in Winnipeg No.1 with a good education, the Reavis Report had recommended that the School Board of Winnipeg No.1 immediately replace its outmoded school buildings and/or rebuild those buildings that were not too badly depreciated. The recommendation of the Report read in part:

> It is not good public policy for a modern city to house its school children in outmoded school buildings. The effect of the environment...on the physical, mental, and aesthetic development (approximately 6,000) who are housed therein during the formative period of their

> lives is unfavorable and is a definite obstacle to good education....The survey staff recommends that the Superintendent of Schools and the Building Commissioner formulate a replacement program... and that the Board give this problem the consideration which its gravity warrants.[13]

Since we are primarily interested in what Lorimer did to strengthen the capacity of Winnipeg No.1 to educate children in keeping with the spirit and letter of the law, it is appropriate now to turn to The Public Schools Act respecting the power and duties of school boards to understand the Board's responsibility in light of this situation. Part VI, Section 143(1)(a) of The Public Schools Act, (Cap.215 - 1954) reads in part:

> 143. (1) The board of trustees of a city, town, or village school district shall
>
> (a) provide adequate school accommodation for the children resident in the district who are between the ages of six and sixteen years.[14]

Lorimer, as Director of Research and Personnel (1949) was assigned the task of finding the monies needed to install and support a school building program in Winnipeg No.1.

Accommodating students. Student enrolment between the years 1949 (30,219) to 1966 (48,436) increased by 18,217 students, necessitating additional accommodation. The Reavis Report called for the immediate modernization of the school plant (62 schools). The building program would entail the construction of new buildings where needed, the replacement of obsolete buildings hazardous to the health and safety of students, and the reconditioning of the better older

buildings provided the cost of rehabilitation could be justified.[15]

The job of the superintendent and the school architect was to present the Board with a recommendation as to what action to take, and to supply the School Board with the factual data that Board members needed to understand the scope of the problem, so they could make a final decision with respect to replacement, new school construction, or refurbishment of some of the older school buildings.[16]

Lorimer's job, as director of research and personnel (1949) and later as superintendent (1952-53), was to "get money-by-laws passed by voters with a 60% majority or there could be no school."[17] This would entail the development of a school building plan that the trustees would support, and then the acquisition of the specified amount of money from the provincial government and the municipality through the money by-laws, followed by the implementation of the building plan. Lorimer provided the leadership needed to mobilize support for the money by-laws. It was hardly an easy task, as he explains here:

> ...my first and most pressing task was to establish the parameters for the publicity for the next money by-law. The by-law required approval by 60% of the voters so it was essential to organize the case for its passage. With the help of the central office staff, the trustees, the principals, various civic bodies, the media, Home and School Associations and other groups, a campaign was put together for the next and subsequent by-laws, all of which passed so that Winnipeg Schools were not reduced to shifts as were the the suburbs.[18]

The approval of money by-laws required authorization by a majority of the District's ratepayers (60%). But, many ratepayers in Winnipeg No.1 did not understood why the money by-laws were needed. Others worried that their school taxes would increase annually in order to retire the debenture debt created by the money by-law, as well as the interest (3% on average) attached to the millions of dollars borrowed from the Bank of Montreal. From a legal standpoint, each proposed money by-law had to be publicized, and all who were deemed eligible to vote (electorate) had to be provided with the facts and figures needed to understand what a money by-law was, why it was needed, why they should support it, and what it would cost them in terms of additional tax dollars. On average, a money by-law was needed every two years.

When asked to say whether any trustee had ever opposed a money by-law, Lorimer indicated that no trustee had ever opposed a money by-law during his leadership career. He observed, however, that at election time, each two years, trustees did use the success of the money by-laws to get re-elected. When asked if a particular money by-law had ever caused a rift among Board members, Lorimer replied that the support for the money by-laws among the trustees was always unanimous - "there were no rifts."[19]

To ensure that each consecutive money by-law received ratepayer support, a publicity campaign was used to educate the public and to influence the public. And since Winnipeg

No.1 never lost a money by-law, one might reasonably conclude that Lorimer's efforts to mobilize support for each proposed money by-law were successful.

According to the ANNUAL REPORTS for Winnipeg No.1 from 1949 to 1966, Lorimer provided the leadership necessary to acquire seven money by-laws. With one notable exception in 1951 ($800,000), the value of each money by-law exceeded one million dollars. The seventh money by-law (1962) was for $5,000,000,000.[20] One might wonder, therefore, what positive steps he took to ensure that each proposed money by-law received 60% of the electorate's vote. It should be mentioned here also that no data related to voter turnouts and approvals for the Lorimer years could be located.

On his own initiative, Lorimer joined the Chamber of Commerce (1957). But, when he informed the School Board of his intentions to become a member of the Chamber of Commerce, the "left side" of the Board objected. Here, he explains the action he took over the objections of one Board member in particular:

> The left side of the Board-CCF/NDP and the Communists-didn't have positive views of the Chamber of Commerce. As far as they were concerned, the Chamber was bad. So, I became a member because of my responsibilities, particularly in money by-laws. Mr. Zuken was totally opposed to the Chamber. I felt that since it didn't cost that much to be a member of the Chamber, not only to improve my possibilities of relating to society but in order to promote more effectively money by-laws, it wasn't unreasonable to ask the Board to pay my annual membership. They agreed. Mr. Zuken was off the Board for some reason, but he came back in the budget discussions and raised an objection; so I started paying it myself. It was nothing of consequence to the

> School Division and it was not a major matter with me—just the principle of the thing.[21]

He sought to influence the Civics Bureau in the following way:

> ...the Chamber of Commerce had a division called the Civics Bureau which looked into local government and the operation of the city and the local school system. When the money by-laws were developing, again, the Chamber of Commerce was looked upon as being an influential body to influence thinking at least in one part of the city. So I became a member of the Civics Bureau, went to their meetings, explained the by-laws, took literature that we distributed to parents and so on. And as a result of that, we got the support of the Civics Bureau and the Chamber of Commerce for the money by-laws, which was critical. I would have done the same thing with the unions if they had provided any opportunity to do that, but they didn't.[22]

In turn,

> the Civics Bureau would recommend to the executive of the Chamber that they support this money by-law and the Chamber, in every case, said yes. After doing this in the beginning, I became a member of the Chamber of Commerce in order to provide opportunities there and to get to know a lot of businessmen, and so I was able to influence the general direction of their thinking which I must say was positive. I don't ever remember being at a Chamber executive meeting or Civics Bureau meeting where there was any, maybe any opposition, never mind any strong opposition. They were all mentally organized before it, but they wanted to know what it was for and why it was and so on and so my job was to, in other words, motivate the troops.[23]

Since the members of the Chamber of Commerce have always tended to be influential and powerful within their own spheres of action, one might reasonably conclude that their efforts to advance the money by-laws were probably very helpful. On the other hand, since an extensive building campaign was good for business in Winnipeg, their support would not have been surprising.

Lorimer also became a member of the Rotary Club of Winnipeg and served as president from July 1st of 1962 to June 30 of 1963 for the same reason he became a member of Chamber of Commerce, and he continues to be a member to this day. Though Lorimer was not the only player in securing the money by-laws, he did provide the leadership initiative and sustained effort to ensure that they were supported by 60% of the public.

Following the approval of the money by-law for the building program, the next step in accommodating pupils was to select suitable locations for the construction of new schools, based in large part on the superintendent's recommendation. Section 1.1 - "Duties of the Superintendent" of the Code of Rules and Regulations (1954) authorized the superintendent to: Keep the Board informed of the needs for school sites and school accommodation and make recommendations thereon.[24] Section 1.10 of the Code of Rules and Regulations authorized the superintendent to direct the work of the school architect with respect to the preparation of "plans and specifications for new buildings or additions to existing buildings as required."[25]

To gain some much needed understanding about the construction of modern school buildings, Lorimer began to attend conferences both in Canada and the United States concerning modern school construction. In 1955 he attended a conference at the Centre for Continuation Studies at the

University of Minnesota. He was accompanied by the Chairman of the Building and Policy Committee (H.W. Moore, Trustee) and by the Commissioner of Works and Buildings (W.A. Martin, Administrative Staff member). In effect, these individuals comprised Lorimer's "building team." Conferences such as these helped Lorimer and his team members to achieve insight into modern techniques of school building with an eye to present-day methods of teaching.[26]

Such knowledge undoubtedly informed Lorimer's thinking four years later when it came time to select a suitable location for Grant Park High School, prior to its construction in 1959. As he explained, other factors had to be factored into the choice of a building site:

> The school building program was a major activity. Here is one example - Grant Park High School. A second high school was needed in the south west portion of the city. As usual we assembled all the data, drew up a list of needs for a school and then translated them into facilities. We studied locations and concluded that the present location was better than the one much farther west. There was considerable discussion about size and location but we marshaled the arguments and after much consideration the Board agreed. When it got built and put into operation, it turned out to be a satisfactory choice for the students and the community.[27]

Ancillary to Lorimer's efforts to accommodate all pupils were his continuous efforts to improve Winnipeg No.1's school plant in ways that enhanced the capacity of the system to provide students with a good education. For example, during his unannounced visits to different schools each Monday morning to observe teachers at work in their classrooms, Lorimer would confer not only with the principal

and the teachers, but also with the caretaker. While the idea of a school superintendent hobnobbing with the school caretaker may have seemed strange to some, such visits contributed to the improvement of the school plant, as Lorimer explains here:

> Not only did I commune with the principal and some teachers, in the small schools, but I also went down to have 10 or 20 words with the caretaker to talk to him about what he was doing. But that was a strange thing to them because...they only knew the superintendent by having seen him in the hall or something like that; so I'd go down and talk to the caretaker about how his job was going, how satisfactory this was or that was or should we think of changing from this to something else and of course, one of the biggest changes at the time was converting from coal to gas. The problem of heating schools with coal and getting the proper kind of coal were tremendous in number and demands on the caretaker and the central staff that looked after that sort of thing....the School District was a combination of the work of a lot of people in a lot of different areas and I was interested in all of those areas to see, as with the educational operation, if there was something we can do that's better. I had an uphill job in many ways in persuading some of the trustees that we should convert to gas. You wouldn't believe that now, but at the time, I don't remember what the arguments were, but I remember spending a lot of time at Board meetings discussing the cost of conversion in budget discussions.[28]

When Sybil Shack was appointed Principal of Rockwood School in 1954, she inherited a school with an unusual heating problem, which Lorimer fixed. Said Shack:

> He knew his system from the bottom up. He was interested in every aspect of the system. He visited every school; he knew every principal. When I became principal of Rockwood School after I left Sargent Park in 1954, the school was having trouble with heating. One wing of the school just couldn't be heated and we had everybody out from the office and the engineers and so on. The day that he came to visit the school I told him about this situation. He went and looked at the heating system and he knew exactly what was wrong with

it. A week later it was fixed.[29]

Presumably, Lorimer's familiarity with heating systems was an asset when it came to planning modern school structures.

From a monetary standpoint, Lorimer provided the leadership in Winnipeg for a 26.7 million dollar school building program.[30] Put another way, Lorimer provided the leadership needed to build twenty-four new schools during his career.[31] Another threat to Winnipeg No.1's capacity to educate its pupils concerned the establishment of larger administrative units, resulting from the Manitoba Royal Commission on Education.

Protecting boundaries. The terms of reference for the Manitoba Royal Commission on Education (1957) read in part:

> AND WHEREAS section 8 of Order-in-Council No. 841/57 provided, in part, as follows:
>
> 8. The purpose of the Commission shall be to inquire into and report upon such matters and things pertaining to education in the Province of Manitoba as may be prescribed by the Lieutenant-governor-in-Council.[32]

With respect to the organization and administration of school divisions in Manitoba, the Royal Commission took the position that the establishment of some form of larger administrative units was necessary if the children of the province were to be provided with anything approaching equality of educational opportunity and offered the following arguments in support of larger administrative units:

a) Adequate secondary school facilities can only be provided if the number of pupils in attendance is large enough to justify a diversified secondary school program.

b) The increasing cost of education can be met more equitably only by a wider degree of equalization to offset the great inequalities in the assessment of existing school districts.

c) Improved transportation has made it more practical to assemble in large attendance units a sufficient number of pupils to utilize more efficient and better instructional facilities.

d) Improved administrative practices such as central purchasing and the employment of a full-time secretary become economically possible.

e) Special services in such fields as supervision, visual education, music, and library can be provided more economically than could be done for a single small unit.

f) Competent teachers can more readily be obtained and retained.[33]

The Royal Commission ushered in sweeping boundary changes affecting the integrity (organizational and administrative) of school divisions and districts throughout Manitoba. For the province as a whole, the organization of secondary school divisions was a most significant step. Clearly, however, Winnipeg No.1 viewed the proposed amalgamations as a potential threat to its institutional integrity. This was made abundantly clear to the Royal Commission in Winnipeg No.1's BRIEF PRESENTED TO THE ROYAL COMMISSION ON EDUCATION BY THE TRUSTEES OF THE SCHOOL DISTRICT OF WINNIPEG No.1 in November, 1957, which said:

> The Trustees made a preliminary submission to the Greater Winnipeg Investigating Commission in October, 1956. in this submission the Trustees assured the

> Commission of their interest in the question and of their willingness to co-operate in any study of metropolitan school organization proposed to or by the Commission. The Trustees took the position that the two factors of improved services and economy of operation were of primary importance in any metropolitan scheme and that the School District of Winnipeg was sufficiently large to achieve the benefits that inhere in size of system and diversity of services.[34]

And further:

> The Board recognizes the concern of the community to see that educational matters are thoroughly explored and discussed and adequate solutions developed. However, it wishes to reiterate its position that the School District of Winnipeg No.1 is presently large enough to achieve the benefits of size and that, in the event of any metropolitan organization, there should be no additional burden on the taxpayers of the City.[35]

The only obvious effect to the boundaries of Winnipeg No.1 was the change in name from the School District of Winnipeg No.1 to The Winnipeg School Division No.1 in 1959. The potential threat to Winnipeg No.1's integrity never materialized which seems to be some indicator of either the times, or of Dr. Lorimer's ability to craft persuasive recommendations, or both.

The other potential threat to institutional integrity that never materialized was the controversial question of Shared Services.[36] As Lorimer explains in the ANNUAL REPORT FOR THE YEAR 1965, Winnipeg No.1 had for many years provided private schools with certain services that they lacked.

> The province of Manitoba has passed legislation to provide certain assistance for private schools and to make it permissive for local school boards to provide other services. Accordingly, free textbooks were provided by the province through the Winnipeg

> School Division, and the Division continued to make education available in Home Economics and Industrial Arts where space and teaching time were available. These last services have been provided for so many years that no record is available as to their beginning but it appears to be more than forty years.[37]

According to Joseph Stangl, in Winnipeg No.1, these arrangements dated back to the 1930s. So, in fact, there had already been some precedents for shared services between the private and public schools.[38]

In concluding this section of the chapter, it can be said that Lorimer conserved mission. He played a key role in the preparation and adoption of the Code of Rules and Regulations as well as the mission statement contained in the new Code. And when Winnipeg No.1's capacity to educate its resident pupils was compromised by lack of proper accommodation for an ever-increasing pupil population. Lorimer led the way to find 26.7 million dollars needed to build eighteen new schools and many new additions. In doing so he met the need to properly accommodate all of Winnipeg No.1's pupils and thereby effectively strengthened the School Division's capacity (non-executive authority) to do what it was mandated to do - to educate its pupils. The next section of the chapter examines Lorimer's actions intended to protect Winnipeg No.1's core goals and values and to transmit them to new generations of organizational members.

Conserving Values

Terry defines a value as an "object of desire" capable of sustaining group identity, including any set of goals or standards that can form the basis of shared perspective and group feelings. A core value, then, is an important objective that creates a shared perspective among a group of people within a public bureaucracy.

Conservators conserve values, suggests Terry, by concentrating on their relationship with the executive cadre and the strategies to be used to ensure that their cadre remains viable. Viable in this sense refers to the cadre's capacity to protect the values of public bureaucracies from harm. Accordingly, the conservator must pay special attention to maintaining commitment among the executive cadre and to ensuring that it is adequately composed in terms of the skills, attitudes, and behaviours needed to preserve institutional integrity (distinctive competence).

The meaning of "executive cadre" is contextual. It requires an explanation. When Lorimer was appointed superintendent in 1953, his administrative staff consisted of eight members: two assistant superintendents (Art Thomson, Assistant Superintendent, Elementary Schools, and Gordon MacDonell, Assistant Superintendent, Secondary Schools); one administrative assistant (L.G. Robinson); one secretary-treasurer (H.J. Benningen); one commissioner of works &

buildings (W.A. Martin); one Purchasing agent (L.D. Rankin): and one solicitor (J.K. Morton).[39]

As the school system continued to grow in size and complexity additional staff members were added to Lorimer's administrative staff to perform new assignments, and, in effect, to complement Lorimer's role as superintendent. For example, in 1959, the administrative staff increased to eleven members. The three new positions included an architect (W.I. Enns), a director of maintenance (E.R. Carpenter), and a director of research (C.E. Henry).[40]

Administrative staff members tended to be well educated. Some had pursued advanced training in their respective fields. For example, when Lorimer was appointed superintendent, at least one member of his staff, L.G. Robinson, B.A., M.Ed., Ph.D., had earned a doctoral degree. Most of his administrative staff in 1953 and in subsequent years had earned more than one degree in their respective areas of expertise.

In practical effect, therefore, the administrative staff was comprised of cadre members possessing different yet complementary skills and attitudes that Lorimer could draw from, depending on the type of skills required to address a given situation.

Thus, the composition of the executive cadre varied depending upon the nature of the goal/value being sought. If

an emerging situation required financial expertise then, Lorimer's secretary-treasurer (H.J. Benningen) comprised his executive cadre. If on the other hand, a new school was being planned, the executive cadre might consist of W.A. Martin (commissioner of works & buildings), W.I. Enns (architect), and L.D. Rankin (purchasing agent). Moreover, the executive cadre is more inclined to protect core institutional values when its members are committed to them.

However, this does not mean that the responsibility for conserving values is always shared with the executive cadre. Clearly, conservators possess certain skills, attributes or, indeed, a degree of authority that subordinates lack. Consequently, when an emerging situation exceeds the capacity of cadre members, the conservator should step in. The following incident illustrates this point. On this occasion, Lorimer had no other choice, in his capacity as superintendent, but to deal with the situation himself, although he did get some help from a controversial member of the School Board. The incident was reported in an article of The Winnipeg Tribune (October 16, 1959), entitled "Lorimer Corrects Polly Wolly Doodle". The article read in part:

> Winnipeg children will no longer have to sing a verse of Polly Wolly Doodle containing the word "nigger." Dr. W.C. Lorimer, superintendent of Schools has banned the verse from use in schools. The verse goes:
>
> "Oh I came to a river and I couldn't get across,
> "An' I jumped upon a nigger 'cos I thought he was a hoss."
>
> Last week trustee Joseph Zuken objected to the verse at a school board meeting. It is contained in a song book authorized for use in Winnipeg Schools. Mr. Zuken asked that it be banned. He said a 12-year old girl had

> objected to singing it in a grade 6 class, but had been told by the teacher that she had to sing it with the other children. In an administrative bulletin to teachers this week, Dr. Lorimer said the verse violated the spirit of the school board's Code of Rules. The Code states that nothing taking place in a school classroom should contain any derogatory reference to any race, color, or religion.
>
> "The word 'nigger' is an example of a derogatory term that should not be used in any school. This word occurs in some versions of the song Polly Wolly Doodle and, therefore, either the verse containing this word should be omitted or the song not used."[41]

Lorimer banned the offensive verse from use in the schools of Winnipeg No.1. He also issued an administrative bulletin to teachers in which he pointed out that the verse violated the spirit of the Code of Rules and Regulations. In fact, the verse violated the democratic principle embedded in the mission statement of Winnipeg No.1 that read: "genuine concern for the rights of others regardless of race or creed."[42] The action he took, one could argue, served both to conserve values as well as mission. Undoubtedly, Lorimer's intent was to admonish teachers (especially new teachers) that equality among people of different races and cultures is a core institutional value - one that must not be violated by any teacher.

Next, we examine how Lorimer built and maintained commitment among members of his cadre to larger institutional aims and objectives. But first, what strategies might be employed by the conservator to achieve this purpose?

The main strategies employed by the conservator include: using inducements and persuasion, minimizing dissension within the executive cadre, and building and maintaining high levels of trust between the conservator and members of the executive cadre.

Lorimer did not need to use all of these strategies to build and maintain commitment among cadre members to larger institutional aims. The data provided by Lorimer and selected respondents indicate that the single most important strategy he used to build and maintain commitment among cadre members was to build and maintain high levels of trust between himself and members of the cadre.

Building and maintaining commitment. Terry asserts that the conservator should not take for granted that the members of his cadre are, or will remain, committed to the goals and values of an organization. It would seem however that Lorimer did take their commitment to the goals and values of the School Division somewhat for granted, as he explains here:

> Part of the reason for regular meetings of course, was to develop a superintendent's report for the next Board meeting and to deal with proposals that were beginning to develop, or that we were considering developing, the only thing I needed to do there was to make sure we pulled together the ideas that we had or that others had. If I was seen as dedicated to the job, they were equally dedicated to their part of the job and so it wasn't necessary for me to take any steps to make sure they did their jobs, or make sure they did their jobs in a good way or improved as a result of time or kept in touch with the developments in education, because they considered that those were their responsibilities as well as the responsibility of the whole team. So in

> that sense it was a group of equals and that was the way we worked and that was the philosophy I had with those people.[43]

Here Lorimer describes how values were transmitted and/or exchanged with his executive cadre who, in turn, transmitted them to members of the system through interpersonal contacts or in-servicing, by way of example.

> Two ways---by working closely with them all the time, by discussing what they were doing---what proposals I had for them, what ones they had for me, and what we had for the school system. I never met with any of these people to say "I don't like this or you shouldn't be doing that", because I appreciated the ideas they were bringing forward. I never told anyone how best to achieve reasonable objectives. I might question something and ask if there was some alternative worth exploring. My main goal of course was to develop and maintain as high a quality of education as could be afforded that was consistent with the mission and expectations of the community. When you are working closely with a team of people all of whom share the same goal, that is to make the system efficient so it can serve its main purpose, in this case education, what we decided to do, we all decided; it was as much their policy as mine. I had confidence in them and they led me to believe that they had confidence in me.[44]

It is generally acknowledged in the leadership literature that involving others in collective decision-making by giving them official authority or power to act may have the effect of building or strengthening participating members' commitment to organizational goals or values.

According to Terry, conservators who seek to cultivate and maintain a trusting relationship with members of their cadre may use one or all of the following sub-strategies: honouring formal or informal commitments made with cadre members, taking up causes that are important to cadre members, and supporting the decisions and actions of cadre

members when called on to do so. Lorimer appears to have used all three sub-strategies. But the majority of his actions were focused on supporting either the decisions and actions of cadre members, or the causes they espoused. One might also ask, did Lorimer keep his word? And, could he be trusted?

When asked if Lorimer acted honestly in his dealings with his team members, or if he could be trusted, MacDonell replied:

> I never had the slightest worry that he might be saying something behind my back that was unfavorable. He was a person you could trust and he was consistent from day to day, week to week, and year to year. He didn't blow with the wind. Consistent is the word.[45]

In a follow-up question, MacDonell was asked to recount an occasion when Lorimer had treated a member of the executive cadre unfairly. Upon reflection, MacDonell said:

> I think he can be proud of the fact that throughout his tenure the school system ran smoothly and there weren't any crises; after his tenure there were many crises. People keep telling me in the last 25 years about the good old days when we three were there. Wes's personality, his ability to work harmoniously with people, his sheer ability which was recognized by everybody, his integrity. He wasn't one for intrigue or conspiracy, his fairness toward everybody, as well as his running a happy ship, it was in my opinion a happy ship.[46]

A reasonable interpretation of MacDonell's comments might be that when a leader is seen to be trustworthy, because he shares ideas, provides encouragement to team members, shares power and responsibility, it has the effect of making cadre members feel that they are valued, and that they have a voice in matters that affect them. As a result, they ought

to have greater commitment to the overall enterprise and may take greater responsibility for what happens to the enterprise, including the protection and transmission of core values to other members of the organization through their interpersonal contacts and daily communications.

The comments of John Pankiw (Deputy Assistant Superintendent, 1964) about Lorimer's integrity leave little doubt that Pankiw thought that Lorimer had fostered trust among team members.

> He was a man you could trust, most definitely. He was willing to accept any ideas from any member of the staff. And he was an innovator. In my department we referred to him as the "Great White Father" as a nickname. What I'm trying to point out is that Lorimer was up on a high pedestal; everybody looked up to him, almost worshipped him, because we knew if we had a good idea we could forward it to him and he would succeed in convincing the Board to have it launched....If you were wrong he'd tell you so. If you had a good idea he would congratulate you for it....He never directed me; he never imposed any of his ideas on me. I think he appreciated that I was able to come up with ideas. I idolized him. He was my role model. I am forever grateful for what he afforded me in my career development.[47]

<u>Taking up causes that are important to cadre members</u>. During the course of his interviews, Lorimer mentioned that MacDonell had promoted the idea that trained librarians should be installed in the elementary schools to make the library system more efficient. As MacDonell points out below, not only did he have Lorimer's blessing but also his complete support.

> The libraries were quite inadequate. Teachers never used the libraries at all. There were no resources to help the social studies teachers, or the history

> teachers, or math teachers, or science teachers to stay up to date so they could go to the library and team up with the subject specialist and make those library periods something other than just reading fiction....What we needed was a supervisor of libraries, a Chief Librarian who could in the matter of ordering books facilitate the process, who could bring the librarians together to discuss professionally how they could be helpful to the teachers, and how the Dewey Decimal System could be unified in all schools so that everybody uses the same system. Dr. Lorimer took the lead, of course, in persuading the trustees how valuable this would be, what the outcome would be; that's when Harry Newsome was brought in. He liked the idea of leadership from a central library, not a workshop; all books were ordered centrally from a central place, and they did all the processing of the new books as well as the Dewey Decimal System, and then they were sent to the schools, leaving the librarian with a more unified system and more importantly, Harry Newsom had frequent meetings with the librarians, and a big part of their time was spent figuring out how they could radically change the way they worked with teachers and the school, so the teachers would be more skilled, more capable, more interested in using the library as an important part of the teaching process. On top of that, Dr. Lorimer was able to persuade us that instead of librarians spending great amounts of their time "shh-shhing" students, there should be an encouragement of student group work within the libraries. An issue that was presented to the teachers was to make sure that this would not be disruptive, and as a result of this more trained librarians were hired for elementary schools. School library facilities were extended so that two classes could converge into one larger area. After a while, most schools had proper library areas.[48]

Although it was MacDonell who took the initiative to modernize the libraries of Winnipeg No.1, it was Lorimer who persuaded the Board to begin the process of improving the library system and to appoint Harry Newsom as Director of Libraries. When interviewed, Lorimer did not mention his contribution to the improvement of the libraries, except to say that they were in need of improvement; instead he gave

most of the credit to MacDonell for improving the libraries. Said Lorimer:

> So while I was part of the process, the original impetus for that was developed as a result of Gordon's working as a high school teacher, as a school principal, and as an assistant superintendent - his knowledge of how the schools were functioning and what could be done with respect to the libraries.[49]

Pankiw, as a member of Lorimer's executive cadre, also received help from Lorimer for his particular cause, vocational education, and he provided the following illustration.

> I was Director of Art Education and from that I was put in charge of the Fine And Course Arts. By Course Arts, I mean the industrial arts or vocational education. During Dr. Lorimer's regime, I planned and drew the basic architectural plan for R.B. Russell School. I remember when I was planning the School, I had to deal with the Federal Government and the Federal Director was a man named Ford. Since, the Federal Government was building these types of schools and funding the equipment for the schools, it wanted final approval through its representative Mr. Ford. So when I pointed out to Mr. Ford that we wanted the family of occupations idea implemented, he said: "No, we can't do that." I told him that we could not go along with that. He said he would come to Winnipeg and meet with us. I figured I had better bring in the heavy artillery, and I got him to come with me to meet with Dr. Lorimer. I don't know what Dr. Lorimer said, but Mr. Ford walked away and said to us, "OK fellows, do the best you can." Dr. Lorimer had convinced him that this is what we wanted and this is what we are going to get, come hell or high water.[50]

<u>Supporting the decisions and actions of cadre members</u>. Supporting the decisions and actions of cadre members when called on to do so can have the effect of strengthening the bond between the conservator and members of his team. The conservator should support his members when their decisions are called into question or when the system is experiencing

an organizational crisis. Supporting the members of one's team can have the effect of strengthening their commitment to organizational goals and values, as well as their personal commitment (loyalty) to the conservator, ensuring that the team pulls strongly together.

Cadre members, Terry has asserted, should also feel that they have the responsibility as well as the authority to make decisions without interference from the conservator; the conservator should provide support for members when in the view of the conservator those members have faithfully fulfilled their duties and responsibilities, and the conservator should give members the benefit of the doubt that they have acted appropriately. MacDonell recalled an incident in which Lorimer came to his support/rescue when a trustee took exception to the fact that MacDonell had purchased one brand of typewriter over another.

> Early in my tenure as Assistant Superintendent of Secondary Schools, I was dealing with what kinds of typewriters to buy. Each year they (School Board) bought us new typewriters and they wanted so many of this kind and so many of that kind. One of the trustees asked why I had purchased this type of typewriter. I wasn't able to answer the question as to why this kind of typewriter was bought in larger quantities than the other type, and he said: "It's obvious that Mr. MacDonell is not on top of his job." Wes jumped in and said, "I think he is on top of his job and this is a rather technical question." My answer would have been, "I'm Superintendent of Secondary Schools and I can't begin to be an expert on everything from physics to industrial arts, or teaching English." I was being evaluated by one trustee on that single issue.[51]

Or, the conservator may show his support for his cadre members by choosing not to interfere with or criticize their

activities. Asked to recall an occasion when Lorimer had criticized his work, MacDonell could not recall a single incident:

> I don't remember any conversation with Dr. Lorimer where he said, "Now look this is what I expect of you in improving education in the secondary school system, and I expect you to deal with the principals." Never in 15 years of working together did he come to me or call me into his office and say, "Look I don't think you're doing the right thing here, and why in heck aren't you doing something there, and here's an area where I think you ought to get something going." I must say that as superintendent, I had a number of times to call in a principal, or stop in to see a principal, or to tear a strip off a principal about something that he wasn't doing right. I never had Wes tear a strip off me. I can honestly say that we never had a quarrel, we never ***had any problems period***. We never had any harsh words to say to one another.[52]

The final strategy used by the conservator to conserve values is to ensure that his/her cadre is appropriately composed in terms of skills, attitudes, and behaviours.

An appropriately composed cadre. As mentioned earlier in this section, Lorimer's administrative team was comprised of individuals who were qualified, by virtue of their training, experiences, and educational background, to perform functions that were critical to the operation of the Division, and also to the transmission of core values to newcomers. With respect to members' skills, Lorimer discussed a strategy that he called "cross fertilization." It involved an exchange of ideas with others intended, mostly, to facilitate professional and curriculum development. Cross-fertilization involved the exchange and

acquisition of ideas from multiple sources, as Lorimer explains here:

> Part of the total process is to read what is happening elsewhere. Reading what education writers are writing. Art and Gordon and I attended national and international meetings and from those and from visitors and people we knew, we picked up ideas that were being tried somewhere else and initiated them in Manitoba because they seemed to be good ideas....The cross fertilization that went on as a result of attending various meetings and being on the Board of Directors of the CEA, and the deputy ministers provided us with an opportunity to know what was being done and we got their Annual Reports and read them at our leisure. There was a lot of joint inspiration because of conferences and meetings.[53]

Meetings with his cadre members in particular afforded Lorimer an opportunity to assess in an informal way what they had learned as a result of the cross-fertilization process. Subsequently, decisions were made about what needed to be retained, discarded, improved, or changed with respect to improving teachers' performance or curricuclum development. In this, Lorimer saw his role both as leader and "consultant".

> Generally my philosophy was to encourage people to do the best job that they could do. It might have been quite different from what I would have done in the same situation, having responsibility for those people, and in some cases for their selection and appointment it was my view that I should serve as a consultant with whom they could discuss ideas they had to get my views; but that the whole system would operate best if everybody had a chance to develop and to do the job in the way that they thought it ought to be done. A leader is somebody who develops the capacities, the potential for successful operation in others.[54]

Certain individuals stood out in Lorimer's memory as being especially able. One such individual was the secretary-

treasurer of the School District/School Division, Hank Benningen.

> One person... was Hank Benningen (C.P.A.) as secretary-treasurer. He was responsible for the records of the School District/Division and they were well kept. The financial records were well done. Hank was a very capable person who contributed a great deal to the overall operation and success of the School District/Division.[55]

According to the ANNUAL REPORTS of Winnipeg No.1, H. Benningen started his career in Winnipeg No.1 as an assistant secretary-treasurer in 1942. Further investigation of the ANNUAL REPORTS revealed that he was still secretary-treasurer of Winnipeg No.1 twenty-nine years later, in 1971. Based on Dr. Lorimer's comments above, it would seem that Lorimer considered Benningen to be an especially important member of the team. One might also assume from Lorimer's comments that as far as he was concerned, the indicators of performance for Winnipeg No.1 contained in the ANNUAL REPORTS were both meaningful and accurate, thanks to Mr. Benningen.

Other individuals, Art Thomson and Gordon MacDonell, comprised what might best be described as Lorimer's senior staff. Both played an important role in professional and curriculum development. When Lorimer was appointed superintendent in 1953, Art Thomson was already a member of the administrative staff, having been hired in 1950, as assistant superintendent, elementary schools. Gordon MacDonell was appointed assistant superintendent, secondary

schools in 1953, on Lorimer's recommendation. Lorimer, Thomson, and MacDonell were a "team" for thirteen years up until 1966, when Lorimer resigned in order to assume the position of deputy minister of education in the Progressive Conservative government of Duff Roblin. The following illustration is intended to show not only that Lorimer depended on his senior staff, but also that he believed in their capacity to conserve an especially important object of desire, namely, the teaching function of The Winnipeg School Division No.1. Because of the efforts of Thomson and MacDonell in recruiting qualified teachers and in improving teachers performance, the main function of Winnipeg No,1, teaching, was conserved.

Even in times of high general employment, Winnipeg No.1 found it difficult to recruit new teachers. Though less-qualified teachers were plentiful in Manitoba, exceptionally qualified teachers required to provide students with the best possible education were in very short supply. As student enrolment steadily increased after 1949 (30,219 in 1949 to 48,436 by 1966) the problem of recruiting qualified teachers worsened. As far as the Reavis Report was concerned, there was only one way to secure sufficient numbers of qualified teachers each year.

> A more aggressive recruitment policy by the Winnipeg School System is recommended as another means of compensating for the present shortage of qualified recruits to the teaching profession, and as a method of securing the most competent teachers available.[56]

This would entail an increase in the recruitment of teachers from other provinces, from major Canadian cities, from Great Britain, and perhaps from the United States.[57] The problem of finding the "right kind of teachers" became even more acute as student enrolment at the secondary level increased, during the 1950s, and especially in the 1960s when schools began to offer more diversified programs in light of the growth in modern technologies.

In this regard, Section 1.2 (5) - "Duties of the Assistant Superintendent" of the Code of Rules and Regulations stated: "the assistant superintendents shall assist the superintendent in the recruitment and placement of staff."[58] The Code authorized Thomson and MacDonell to recruit teachers as necessary, subject to the superintendent's approval, wherever they might be found, subject of course to Board approval. After evaluating applicants' qualifications, potential candidates were recommended to the Board for appointment. Lorimer's role in the recruitment process, therefore, was one of support or indirect action in that he encouraged, sanctioned, and provided resources (certain resources were subject to Board approval) that would enable his assistant superintendents to recruit capable teachers, wherever they may be found.

While Thomson had relatively little difficulty in recruiting sufficient numbers of qualified teachers within the boundaries of Canada itself, the same could not be said for

MacDonell, who found it necessary to recruit secondary school teachers in Great Britain, as Lorimer explains here:

> ...Mr. MacDonell found it necessary to look further afield so that for several years he went to Britain in the early spring to recruit teachers. This was a successful enterprise and the teachers who came to us, having heard about the opportunities enabled the system to cope with growing needs.[59]

Some of the opportunities included: higher pay for higher qualifications, a salary schedule that favoured secondary teachers, and increased pension benefits. The British teachers brought with them another object of desire that was valued in the school system. Not only did they bring professional skills and experience, but also a cultural background that both the District and the City of Winnipeg valued. Having come from Regina, Lorimer did not immediately understand the significant role that middle class British Protestant values played in shaping Manitoba's public school system.

> The Winnipeg system, strangely enough, seemed more oriented towards British education more than anything else, and Winnipeg was more British than Regina by a long way. One minor item was that the girls wore tunics! I didn't even know what a tunic was until I came to Winnipeg; tunics were the pattern in Britain and always had been. They were brought over by Bob Jarmen who was hired by Daniel McIntyre, with the School Board's approval of course, to come to be the head of physical education in the schools, because that was his background in Britain, and so if you were going to have girls stay in high schools taking physical education, they had to wear gym outfits; so that became the pattern. Well that's an illustration of the philosophy that, as I say, went back to the British system of education and permeated the Winnipeg system.[60]

In light of the above, one might speculate that the deep entrenchment of British tradition in the Winnipeg school system could explain why teachers from the United States, even those living nearby, in the northern states, were not actively recruited by Winnipeg No.1.

In the ANNUAL REPORT FOR THE YEAR 1960, Lorimer justified MacDonell's efforts (and the expense required to import British teachers to Manitoba) by saying, "had they not been recruited, there would not have been available locally alternative appointees of anywhere near the same qualities."[61] Lorimer's comments most certainly alerted the public to the fact that teacher preparation in Manitoba was, basically, inadequate. In the same Report, Lorimer also made it abundantly clear that he had confidence in MacDonell's ability to find qualified secondary teachers.

> It is hoped that the contacts made and experience gained through Mr. MacDonell's recruiting trip of January will result in an increased flow of well qualified teachers from this source in future.[62]

Lorimer's comments also indicated to constituents that the School Board had as one of its most important values, ensuring that students received the best possible education.

As enrolment at the secondary level increased during the 1950s, the number of qualified teachers recruited from Great Britain, and later from Europe (during the 1960s) also increased. In 1956, 64 secondary teachers were hired. Four or 6.3% of these teachers were recruited from Great Britain.[63] In 1957, 77 secondary teachers were added to the

existing staff. Of these teachers, eleven or 14.3% were from the British Isles.[64] According to the ANNUAL REPORT FOR THE YEAR 1963, 158 new teachers were added to the secondary school staff. Of these new teachers 26 or 16.5% were recruited from Europe.[65] By 1964, however, the number of teachers recruited from outside Canada began to decline as the number of teachers (63 as compared to 43 in 1963) graduating from the Faculty of Education, University of Manitoba increased.[66] Subsequently, the number of applicants increased which permitted greater selectivity. The other complementary object of desire was improving teachers' performance.

The Reavis Report concluded that methods of assessing performance were in a period of transition both in American and Canadian school systems. Moreover, the older methods used by Manitoba's school administrators, such as the personal judgment of school inspectors, and the "rating" or "check" scale needed to be replaced, largely because school principals did not have the advanced training necessary to evaluate teachers' performance, or to provide effective instructional leadership to their teachers.[67] Nor did the survey staff of the University of Chicago have a formula to offer for teacher appraisal.[68] As the "cumulative-file" scheme of appraisal was under consideration, it at least offered a long-term method of evaluating desired types of teacher productivity.[69]

The Reavis Report did, however, make the following recommendations that Lorimer and his senior staff members (Thomson and MacDonell) acted on.

> ...As immediate measures, in order to supply creative and understanding instructional leadership within the next few years, systematic and vigorous in-service programs for principals and potential principals should be provided....It is recommended that the Winnipeg schools improve their orientation procedures along several lines. It may be possible for administrative officers to meet with newly employed teachers for a week or two before the regular program of each school year....Particular efforts should be devoted to the supervision of new teachers. Regular meetings for new employees of the system during the first year of service may prove advisable.[70]

As Director of Research and Personnel of Winnipeg No.1, Lorimer chose to personally assess the adequacy of teachers' performance, using as his instrument his considerable knowledge of teachers' performance acquired as an instructor in the Normal School of Moose Jaw, as a teacher in both rural Saskatchewan and Regina, and through his post-graduate work at Columbia, which included student teacher supervision.

> My teaching experience in the Normal School at Moose Jaw got me in touch with what was happening in the rural schools where our students went for practice teaching. I did a lot of classroom visitations there. I did some supervision of student teaching when I was at Columbia in slum areas in New York that make the core area of Winnipeg look like paradise.[71]

One might hazard to guess that Lorimer's experience as a student teacher supervisor in the slum areas of New York may have increased his sensitivity towards disadvantaged children, such as the immigrant and Aboriginal students of Winnipeg No.1.

In order to assess the quality of teaching offered to students in Winnipeg No.1, Lorimer set aside a half-day each week to visit different schools (Monday mornings usually) without notifying anyone save the principal that he was going to pay a visit. Observing teachers at work in their classrooms was a critical first step in the process of improving teaching practices in Winnipeg No.1, as Lorimer explains here:

> ...in the beginning I wanted to visit schools to see what was going on in the classrooms and to talk to teachers and principals for educational reasons; but I also needed to do that in order to get a wide sampling of all the staff in the School Division. So that was the first thing to do and the second thing to do, of course, was to look at the practices of the Division in the schools of which I already knew something about from my work as Director of Research, and then to discuss with my colleagues Gordon MacDonell and Art Thompson what steps we might take, or what educational directions we might propose that would contribute to the growth and development of the system. So we spent a good deal of time looking at past practices and what we might do to either change direction or to improve existing practices in light of educational philosophy at that time in order to determine what reasonable steps to take.[72]

Having visited different schools of the Division, Lorimer in consultation with his assistant superintendents decided whether or not "things were being done which we thought fitted in with the philosophy of the system and if not then some discussions were held with the individuals with respect to the way in which they functioned in their schools."[73]

MacDonell recalled that when Lorimer visited schools, he

> got to know the school and the principal and the first thing he would ask the principal of the school

> would be, what is your educational plan for the improvement of your school educationally for the coming year? One of the constant themes that Dr. Lorimer presented to them, as superintendent, was that they had a most important role in the supervision of teachers. I remember going into a school and the principal was busy counting out 30 poppies for this class, and 35 for that class, and I thought to myself why is he doing this when a grade 6 pupil could be doing this, or the secretary could be doing this.[74]

To assess and improve teachers' performance, school principals had to first acquire the technical knowledge and skills they lacked. Lorimer provided more in-service opportunities for school principals and vice-principals to learn advanced techniques of supervision. Here John Pankiw, explains why Lorimer's approach to in-service education was not only effective, in his opinion, but also unique.

> He introduced one of the first opportunities for principals to attend conferences outside the Division. In other words, get the principals away from their offices and go to a place like Falcon Lake, without interruptions, where we can sort things out. That to me was a terrific idea indicating leadership; that was unique, I'm pretty sure that was an innovation as far as in-servicing training of principals was concerned.[75]

Innovative in-servicing of this type may have afforded senior staff an especially effective way to inculcate new organizational members with core institutional values. With respect to the superintendent's role in the in-service training of teachers, Lorimer explained its purpose.

> One of the important things about education and teachers, it seems to me, is in-service programs. I think that part of the job of any staff [superintendent] of any school division is to encourage the development of in-service programs and to make sure that such programs are at a reasonable and practical level so that new developments can be translated into action, or declining emphasis in some areas as a result of new knowledge or improvement in other areas is constantly re-examined.[76]

Lorimer gave force and effect to the provision of in-service education when, in 1954, he assigned that responsibility to his assistant superintendents: MacDonell and Thomson. Section 1.2 - Duties of the Assistant Superintendents (10), Code of Rules and Regulations stated:

> The assistant superintendents shall aid the superintendent in the development and execution of policy and shall be responsible to the superintendent for such duties as he shall assign to them. Without in any way restricting the generality of the foregoing the assistant superintendents shall:
>
> 7. visit schools as a regular part of their work.
>
> 10. provide leadership in the program of in-service education in the school system.[77]

After 1954, Lorimer's responsibilities as superintendent began to restrict his ability to supervise teachers, though he did continue to do so whenever possible. The Code made the supervision of teachers the responsibility of the assistant superintendents, department heads, and school principals. Visiting schools on a regular basis afforded MacDonell and Thomson the opportunity to evaluate both the principals' supervisory practices and teachers' performance, and then to address any observed weaknesses during in-service training sessions. Not surprisingly, perhaps, the in-service opportunities for teachers, especially new teachers, increased in number and scope. For example in the ANNUAL REPORT FOR THE YEAR 1966, in-service education for new teachers consisted of a two-day pre-school institute for all new teachers to provide an opportunity for them to gain some orientation to the school system. Reading and

Cuisenaire arithmetic were given emphasis for primary teachers, whereas for intermediate teachers emphasis was placed on modern mathematics and the language arts. In the same Report, Thomson observed: "These sessions have greater impact on teachers than do conventions, as it is possible to organize the sessions so that there may be greater depth to the study."[78]

To ensure that Winnipeg No.1 had the best teachers, Lorimer authorized his assistant superintendents (MacDonell and Thomsom) to recommend the removal from the system of any teacher whose performance could not be improved. MacDonell described the situation and Lorimer's involvement this way:

> We recognized right from the beginning that we had inherited teachers who weren't as good as they might be; some were mediocre or poor....We instructed the principals that there was no use telling us at the end of the year that this teacher should be placed somewhere else. We implied: what have you done during the year to be helpful to him? As far as the Teachers' Society was concerned when it was time to recommend to the Board that a teacher's contract should be terminated, we were expected to have evidence or the principal's reports over a period of time....Dr. Lorimer's personal involvement in this process was to bring people into the office and say, "look we think you are an intelligent person but we also think you are in the wrong profession." He would strongly recommend that that person change professions.[79]

Since the dismissal of a teacher was (and is) a very serious matter, Lorimer's involvement with this process may have been necessary to persuade those teachers who might resist their dismissal from doing so, or from seeking legal recourse through The Manitoba Teachers' Society. However, if

a teacher resigned there was no reason to pursue the matter further.

It is generally accepted by researchers in the field of educational administration that if one wants to see what a leader values, one should watch what he or she does. Lorimer's actions (and the actions of MacDonell and Thomson) indicated to teachers and principals alike (and ultimately to the public) that the teacher is the key person in any educational program. Hence, the surest way to make certain that students received the best possible education was to hire only "the cream of the crop" and then to assess their performance with an eye to improvement, and when necessary to relieve the system of any teacher whose performance could not be improved. One might surmise, therefore, that teachers came to understand that what was expected of them was the best they had to offer.

In addition to providing in-service education opportunities, a further strategy employed by Lorimer intended to produce better qualified teachers and thus to provide all students (in Manitoba) with the best possible education, was to try to persuade the province to improve the teacher preparation program. For example, in ANNUAL REPORT FOR THE YEAR 1960, Lorimer chastised the Teachers' College of Manitoba for the poor judgment it showed by failing to set appropriate standards for admission to the elementary training program. He wrote:

> Considering the requirements of education today and the need for the best possible program of instruction for all pupils, it is suggested that improvements should be made in the program of teacher education. Standards for entrance into the teaching profession need to be raised. It is regrettable that entrance requirements for Teachers' College are lower than for University and that students who have failed and been required to withdraw permanently from University, may be admitted to Teachers' College.[80]

Lower admission standards increased the likelihood that a greater number of individuals graduating from Teachers' College, after 1960, would perform poorly once in the classroom. Students of these teachers would not profit from their instruction during their formative years, and poor performing teachers would further diminish not only the Division's reputation, but also the public's respect for teachers in general, and especially for teaching as a respected profession. Without respect, pre-service standards of teacher preparation could not be raised. Nor could the basic standards of teacher preparation be greatly raised.

In concluding this section of the chapter, it can be said that values were conserved: secondary teachers from Great Britain were hired; teachers' performance was improved and the core technology of the School Division was conserved. In addition, the School Division's core goals and values were transmitted to new organizational members through professional development, in-servicing, and interpersonal contacts. Lorimer built and maintained a viable executive cadre. Cadre members were committed to protecting and transmitting institutional values. Lorimer was trusted and

he, in turn, trusted his cadre members to preserve the core competence of Winnipeg No.1, which they did. The third function identified by Terry is conserving support both externally from public and other constituents, and internally from those who are members of the institution, such as the School Board of Winnipeg No.1.

Conserving Support

The main strategy used by Lorimer to conserve external support was to create and sustain a favourable public image.

Creating a favourable public image. Beginning in 1905, a standard practice in the Winnipeg School Division No.1 has been to issue official reports (for public consumption) documenting its activities and accomplishments. The ANNUAL REPORTS perform a vital function in that they articulate, reinforce and shape the perceptions of those who have a stake or interest in the school system's programs, services, or activities. These reports are also useful in creating what Terry refers to as a favourable public image that may be transformed into prestige, which, in turn, increases the likelihood, but does not necessarily guarantee, that the School Division will continue to receive support (resources) from the external environment in which it is located.

Resources, we have learned, can range from school members to social legitimacy. And the ANNUAL REPORTS convey both quantitative and qualitative information intended to

engender confidence among stakeholders (or allies) by assuring them that the agency's actions and activities are not only legitimate (and effective), but also consistent with the spirit and letter of the law. At the same time, the ANNUAL REPORTS serve to buttress both the system's credibility and that of the school administration, and indeed that of the School Board. In order for the school system as a whole (and the School Board) to be viewed as credible, the information comprising the reports must be consistently accurate otherwise pronouncements by Board members, by the superintendent, or by other officials would no longer be believed by stakeholders.

To ensure that a credibility gap did not occur between Winnipeg No.1 and the public, Lorimer continued the practice of previous superintendents, intended to create a favourable public image, by including a section in each ANNUAL REPORT entitled, ANNUAL REPORT OF THE SUPERINTENDENT TO THE SCHOOL BOARD. This Report afforded him an opportunity to discuss, in a balanced way, educational matters of importance to all stakeholders that ranged from changes in policy or administrative structure to new developments, such as the establishment of a $5000.00 grant for post-graduate study for members of the staff of the Division that would allow members to take advanced study either in academic or administrative work with an eye to strengthening the quality and integrity (cohesiveness and unity) of the educational staff.[81] In 1960, for example, Lorimer introduced a booklet,

What's New in Winnipeg Schools: A Report of the Winnipeg School Board. Unlike the ANNUAL REPORTS that detailed all the "goings-on" in the Division, the booklet's purpose was to present "a short account of some of the new developments in the Division." In this way Lorimer reinforced the perception among stakeholders (and potential stakeholders) that nothing was being hidden from the public, that the School Division's functions and processes were consistent with the needs and expectations of the public, and that the school system (and all of its members) were acting responsibly and in the best interests of those whom it served.

In general, the ANNUAL REPORTS contained a range of information sufficient to enable a member of the public, for example, to gauge whether or not the Division was doing what it was supposed to be doing, and how well. Included in the ANNUAL REPORT FOR THE YEAR 1961, for example, were data about the results of standardized testing; data about the value of teacher in-service education; data about efforts to meet the academic needs of different categories of students (Aboriginal and slow learners, for example); and the Division's concerns about such matters as students' transition to university and the dangers of cigarette smoking.[82] Thus, an important aspect of the ANNUAL REPORTS was to communicate to the citizenry an understanding not only of how the system actually worked, but also of how their hard-earned tax dollars were spent, or, alternatively,

how much more might be required in order to build a new school, or to introduce a technological innovation to buttress the core technology. In other words, the purpose of transmitting statistical information to the public through the ANNUAL REPORTS was to both inform and reassure stakeholders that the School Division had the capacity to perform its delegated function.

It should be mentioned here that the ANNUAL REPORTS were also used to acknowledge the valuable contributions or outstanding service of different employees, at all levels of the school organization. This may have had the effect of enhancing individuals' confidence in their own ability to exceed or meet established workplace standards and expectations, and further, of satisfying the public's expectation that the School Division was doing its job properly, or better than expected.

The ANNUAL REPORTS played an educative role as well. For example, in the ANNUAL REPORT FOR THE YEAR 1953, Lorimer informed the public that in an attempt to help the citizens of Winnipeg to better understand the purposes and practices of the school system, he had authorized the printing of ten thousand copies of a pictorial ANNUAL REPORT to be distributed to the citizenry. Lorimer also pointed out, in the same REPORT, that the information contained in the pictorial REPORTS and in future REPORTS was intended to help readers to assess the school system's business practices and

to point the way to economic and increased efficiency of operation.[83] This information was probably intended to reinforce readers' faith and confidence in the system by assuring them that the agency's functions and processes would be adjusted as and when necessary. The problem, of course, is that once the public's expectations have been raised to a higher level of expectation, the greater will be the intensity of public scrutiny. Thus in order to sustain an organization's favourable public image, the indexes of quality must be both meaningful and accurate.

Ensuring accuracy of indexes of quality. As to the accuracy of the information presented in the ANNUAL REPORTS, that responsibility was delegated to various members of the School Division, depending on each member's field of action. Lorimer did read everything; but it made more sense, he said, to let the "experts" present the facts.[84] In other words, unlike the conservator, Lorimer did not constantly monitor and inspect information (qualitative or quantitative) prepared for public consumption to ensure that indexes of quality were accurate, because it was too much work on top of everything else, and because the people who contributed such information "were competent to produce useful materials." Thus, with respect to the financial affairs of the School Division, for example, Lorimer observed:

> We published, in a sense, as part of the whole building program, we published an annual summary of what was happening in the whole School Division. I can't

> remember if we published it oftener than once a year, but those publications were based on statistics from the school system, programs being offered, their contributions to the education of students in the schools. They were totally accurate.[85]

One might also assume from his comments that the people who contributed information to the ANNUAL REPORTS were not only competent, but had garnered his trust as to the accuracy of materials included in the REPORTS.

As assistant superintendent, secondary education, MacDonell was responsible for the preparation of information pertaining to secondary education. Such information ranged from the introduction of new teaching techniques to the addition of new staff members. In the ANNUAL REPORT FOR THE YEAR 1966, MacDonell reported on changes to secondary education. The titles used in the REPORT emphasized Winnipeg No.1's responsibility respecting secondary education, and that the School Division was amending its practices to include greater use of modern technology in future. Some titles cited by MacDonell in the ANNUAL REPORT FOR THE YEAR 1966 included: "New Developments" and "Team Teaching". With respect to "New Developments", MacDonell's intent was to both inform readers that a driver education program had been introduced for the first time in six of Winnipeg No.1's high schools, and also that the Division had begun to experiment with closed circuit television (two schools) as a new medium for education that could be used in other school divisions in Winnipeg.[86] Clearly, such information was vital in

reinforcing the perception among stakeholders and potential stakeholders that the administration was doing its job.

In addition to maintaining accuracy of indexes of quality, Terry asserts that maintaining a favourable public image depends on the reputation accorded an organization by the public, based on the quality of its products and services. The job of the conservator, therefore, is to ensure that the organization does receive favourable evaluations on the quality of its services on a consistent basis. In order to achieve this objective, the conservator must maintain a reputation for uniform compliance with established standards.

Complying with established standards. To ensure consistent compliance with established standards the conservator may use different strategies (detailed inspections or strict regulation of organizational activities, for example), but the most important (and most readily observed by the public) strategy for this purpose is the adoption of innovations. The conservator should know not only what innovations to introduce, but also when to introduce innovations in order to minimize the risk of procuring new technologies that quickly become obsolete or that constrain the capacity of the organization to pursue future courses of action. Adopting the right innovation at the right time should serve to reinforce the organization's

favourable public image and thus its institutional integrity.

When Lorimer was asked to recall a situation in which he became personally involved with an innovation, he recounted the following incident.

> I can think of one thing that seems trivial but created a big hullabaloo for a long time. That was fire drills. We had a trustee who was hot on fire drills and so he insisted that there should be fire drills held once a month and the students, of course, in the fire drill have to exit the schools and wait outside until it's settled that it's a false alarm, or if it's just a drill that everybody's out and they can all go back. But, the custom in Winnipeg, beginning in Grade I, was that in winter time, when the kids came to school, they took off their boots and so on; one of the rules of the fire drills, is that pupils can't go around by the cloakroom. They can't walk through the cloakroom and pick up their coats as they go out. They've just got to exit as they are, which is no no shoes, no nothing and if they happen to be in high school, and they are in the locker rooms getting changed, they can't even pick up their clothes, never mind stop and put them on....It was a constant struggle to get the fire drill regulations changed to something more sensible which we eventually did, proposing that principals hold fire drills in the fall.[87]

He further observed:

> Well in spite of all the peculiarities and odd and unsatisfactory things that seemed to be required or done, nevertheless fire drills are important in the schools and they were more important back then when a lot of the old schools still had the old tubular fire escapes because there's no escape from the third floor except down a central set of stairs which if there were any fire that would serve as a chimney; so the kids had no choice but to get out these circular fire escapes. They were not without problems, because you say to a student, "get in there" but there's a black doorway and a black wall and he knows that some how he's going to get to the ground, but he's scared stiff. You have to insist that as long as those exist and as long as fire is a danger, everybody needs to take cognizance of that fact and indeed the schools did but not without problems....When there was going to

> be a fire drill put some youngster or youngsters at the top of the fire escape on a sack or on a potato sack and go down the fire escape to clean off the inside of the fire escape and slide down so that the other kids going down would be able to get down more quickly. As I say, that's a trivial thing, but you'd be surprised at how many years and how much struggle it amounted to to get sensible practices in fire drills.[88]

Interpersonal contacts each day with students, parents, caretakers and others afforded Lorimer an understanding of what needed to be to improved, retained, changed or discarded in order to create a favourable public image and thus to preserve institutional integrity.

Certain events can damage an organization's favourable public image. Hence, the conservator must take action to prevent members from engaging in any activity that disparages the organization's image, or, failing that, he should attempt to minimize the damage already done. For example, in 1965, Lorimer was put into the position of having to redress a situation in which the School Division's participation in a rally for the Conservative Party may have damaged the Division's public image. The incident and Lorimer's response to it appeared in The Winnipeg Tribune (October 8, 1965). The article entitled "Use of School Band at Rally Assailed" captured Lorimer's comments and his concern that the School Division should not be perceived as political. The article read in part:

> A high school band and majorette corps, which was paid $100 to appear in school uniform and chant Conservative fight songs at John Diefenbaker's election rally Thursday night, has been censured by School Board Superintendent W.C. Lorimer. The 30 member band from Tec-Voc High School, dressed in its green and gold

> school colors, played pep tunes while the crowd was filing into the Civic Auditorium....A group of about 20 girls, also in school sweaters, gave a demonstration of baton twirling on stage. Members of a smaller majorette corps held up their batons in a triumphal arch for Tory candidates to pass through to reach the stage...."This is not the thing for a school band to do," said Dr. Lorimer after the rally...." I knew nothing of this idea, I would not have approved of it. The whole matter of politics and the schools will be investigated further. It is important that schools show no bias, especially at election time, although it's fine for students to show an interest on their own." School Board Chairman, Walter Paschak, who appeared on the platform for Winnipeg North, has backed up Dr. Lorimer. "In future, it may be a good idea if school bands are not asked to political rallies, especially if they are in school uniform and sing party songs," he said. "I will have to go along with Dr. Lorimer, now that I have learned of the circumstances."[89]

In the article, a spokesman for the Conservative Party was reported to have said this about the arrangement:

> "Tec-Voc School was given a $100 donation by the Conservative Party for the band's services. We wanted to stress the team idea and the idea of youth," said the official. "We also wanted to bring in the football theme to attract young people. We spoke to the band leader, Mr. Merrett, and he arranged it for us. It is regarded as a professional job. They got clearances from the School Board."[90]

One thing is certain, had Lorimer known in advance that Winnipeg No.1's school band was to perform at the rally, he would not have approved it. Perhaps, that is why he did not hear about it until it was already too late. But, by condemning the inappropriate use of the band, he may have prevented further damage to Winnipeg No.1's favourable public image. Interestingly, no mention of this incident appeared in the ANNUAL REPORT FOR THE YEAR 1965, or in any of the documents, including the School Board Minutes.

However, the Code of Rules and Regulations, as established by Lorimer, did not expressly forbid the use of the school band at political rallies.

Maintaining external alliances. The creation and maintenance of a favourable public image can be an effective means of sustaining support for a school organization's programs and services. At an earlier point in the study, mention was made of Lorimer's affiliation with the Winnipeg Chamber of Commerce as a means of acquiring support for money by-laws. It was noted that Lorimer became a member of the Chamber of Commerce on his own initiative. Clearly, he received support, agency benefits and services. One might even say that his association with the Chamber of Commerce benefited the School Division, because the members of the Chamber of Commerce supported the money by-laws. However, no concrete evidence was found to suggest that the Chamber of Commerce or any other organization, for that matter, had received any benefits from the School Division in exchange for support given. It can be said, however, that Lorimer did engage in an activity that Terry has described as an "indirect expression of approval". Lorimer served on the Board of Directors of the Chamber of Commerce; hence, his participation constituted, in effect, an endorsement of the Chamber of Commerce's activities. In return, the Chamber of Commerce may have benefited from Lorimer's advice and leadership. The Chamber of Commerce was not, however, Winnipeg No.1's most important supporter.

It has already been established earlier that Lorimer sought and received support from many sources, such as the provincial government (capital and operating grants) and the federal government (technical vocational grants were received indirectly from the Federal Government). At the local level, the public continued to support the system's building campaign through the money by-laws.

The binding of parochial group egotism. Terry asserts that it is the task of the conservator to build and sustain commitment among internal interest groups/stakeholders to core agency values. This is not an easy task, because organizational members experience multiple commitments. Co-optation is a useful strategy for this purpose. It requires that the conservator engage in activities that will instill in members a sense of loyalty and identification with the enterprise.

The Reavis Report had recommended that the School Board switch from a multiple type of system to a unitary type. This would also fundamentally alter the relationship that had existed previously between the superintendent and the executive committees as well as between the Board and the superintendent. Knowing that the Board was divided politically, Lorimer took on the task of developing a different type of relationship with the Board in his new role as chief executive officer (CEO). A key aspect of this

relationship, then, was to bind elected political officials' loyalties and aspirations to core institutional values.

To further strengthen and preserve the integrity of Winnipeg No.1, the Reavis Report recommended that the School Board change its organizational structure from a multiple type to a unit type with the superintendent as the chief executive officer (CEO) of the board. The superintendent's relationship with the Board would then be comprised of two key activities: developing and sustaining a formal working relationship between himself and the Board (and each successive board), and to formulate policy proposals for the Board and then to implement those policies approved by the Board. But first, what new arrangement was required between Lorimer and each of Winnipeg No.1's five divisions?

In the unitary type of school organization, responsibility for the over-all management and supervision of the system and for the acts and successes or failures of employees belonged to the superintendent. Those divisions (Finance, Building, Supply, Engineering, and Instruction) that had previously reported to the Board (as independent units) would report directly to the superintendent, who, in turn, would report to the Board. Lorimer, as the newly appointed superintendent (1953) had to decide exactly what type of approach to take with the executive officers of the five divisions. It was a prudent approach under the circumstances.

> I took the role carefully-diplomatically. It would have been a disaster for me to throw my weight around, especially when it was unnecessary....the superintendent should become the CEO of the operations system, because prior to that there was a secretary-treasurer, commissioner of works and buildings, commissioner of supplies, chief operating engineer, and commissioner of instruction. And these people were all independent people that reported to the Board. Well obviously that was a poor system, so a big job that I had was persuading the Board that this proposition of administrative structure was an advantage as far as the Board was concerned and as far as the school system was concerned....So these people are now in effect under my direction and responsibility, and that is something they were not used to, or not all of them to keen to accept....My job with them was not to meet with them and say "You should be doing it this way or let's do it this way." My job was to help those people to continue to do their jobs effectively.[91]

The shift in administrative structure also mandated a fundamental change in the nature of the relationship between the Board and its superintendent/CEO. Lorimer was thrust into the position of having to develop a working relationship between himself and a politically divided school board. His relationship with the Board would have to take into account the likelihood that members would seek to advance their own interests at the expense of the public good. Realistically, his relationship with the Board would never work if it were adversarial. Consequently, the Reavis Report recommended (in 1948) that

> the relations of the superintendent and his board be that of a responsible executive to a board of directors who exercise legislative and judicial responsibilities.[92]

Wisely, as it turned out, Lorimer decided that a cooperative relationship might work best. But to establish such a relationship, certain problems had to be overcome. The first

problem confronting him was to establish a relationship between himself and the School Board in which he would guide members' actions with respect to the educational services of the schools, and with respect to the formulation of educational policies in keeping with the regulations of The Public Schools Act of Manitoba. He was to be responsive to the elected political officials, to the public, and to the institution itself. But in order to ensure that Winnipeg No.1 delivered a total instructional program with which to serve efficiently the evolving needs of the community it served, Lorimer had would not only have to provide the leadership needed to draw members' divergent opinions closer together, he would also have to provide Board members with the relevant information they would need to critically evaluate the policy recommendations he brought forward for approval. This might entail, for example, apprising Board members of situations that they themselves had never experienced. For instance, as a newly elected trustee in 1960, Dr. Isadore Wolch called into question the findings of Lorimer's analysis as to why children were not attending school. Wolch described their exchange thusly:

> Part of his duties was to report to us on the attendance figures every month. I was new on the School Board, and the first time he gave the results he had a whole list of different categories why children missed school: one was ill health, another was lack of clothing in winter time, and maybe lack of food sometimes. Then he also had a column called parental indifference. And I looked at it and I couldn't believe it because parents were insistent on children attending schools.... And he comes up with a a column called parental indifference. So, I said to

> him, "Dr. Lorimer, I can't believe my ears. Are you trying to tell me there are parents who don't care if their kids go to school?" He looked at me kind of peculiarly and he said, "Where do you come from? What kind of a world do you live in? That is a very commonplace thing with a lot of people with poor education themselves, and they don't care if the kids go to school or not." It was an eye-opener to me because I thought every parent was insistent their kids go to school. So I appreciated him pointing this out to me and bringing me up-to-date with what was going on in the world.[93]

The second problem was equally challenging. As the architect responsible for building a working relationship with the Board, Lorimer used as his building blocks honesty and above all, trust. But, in order for this relationship to work, Board members would have to recognize that Lorimer was an individual worthy of their respect and trust - their CEO and educational leader. Some members may have been apprehensive about this relationship because the possibility existed that Lorimer might take advantage of their lack of understanding regarding educational matters. In order to allay their misgivings, he frequently articulated his responsibility to Board members.

> I remember saying to the Board on more than one occasion, "I wouldn't want to make any proposal to you (something that is new or different) without telling you the advantages. If there are problems connected with it or we see possible disadvantages, I want you to know about them right away, so you can be assured that when we bring forward a proposal, and I argue that it is something that I think would be good for us to do, you will hear from me what the disadvantages are, so you won't feel that I was trying to pull the wool over your eyes, or only trying to tell you all the positive things". You have got to have that trust within a group of Trustees that they know they are getting the full story and that they are not being brainwashed.[94]

Mrs. Catherine Stewart-Milner was chairperson of the Winnipeg School Board from 1959 to 1960. When asked if Dr. Lorimer had dealt with the Board in an honest fashion, she replied:

> I expected him to know everything about what his job was—to lead us, and he did....One of his greatest attributes was honesty. I believed everything he said. I just assumed he wouldn't do anything underhanded. He didn't have to.[95]

Walter Paschak, Chairman of the Winnipeg School Board in 1966, recalled that the persona projected by Lorimer at Board meetings dispelled animus among Board members.

> He was a middle of the road man....It is hard to be hard on a man or attack him when he sits there well groomed, looks like a family doctor; he is not there to hurt you, he is there to help you. There is just no way you are going to attack him. Even though you intended to give him a hard time that night, it didn't work out that way. He disarmed you completely.[96]

The relationship that Lorimer eventually established with the Board was not unlike the one proposed in the Reavis Report. It worked, suggested Bill Norrie (trustee 1965-1966; chairman 1967-1968; trustee 1969-1971; and later Mayor of the City of Winnipeg 1979-1992), because Lorimer treated the Board members, more or less, as his colleagues. But Lorimer also understood that the "final say" belonged to the Board. Norrie described Lorimer's approach to the Board as collegial:

> I would class his style as collegial. It wasn't top down. He wanted to bring as many people as possible to his point of view. His point of view was well thought out, was sound educationally...but he always came well prepared. He had the evidence to back up his point of view; he had cogent arguments....But it was a

> collegial style...and he would often preface his remarks by saying 'this is a decision for the board.' But this is my view point....If the Board accepted his recommendation he was obviously pleased; if they didn't accept it, he would accept the fact that they had the final decision and in that sense he wouldn't go away and sulk about it, or he might come back to the next meeting and try it again.[97]

The third problem that concerned Lorimer was how to get the members of the Board to acknowledge him as their educational leader. Lorimer's primary responsibility was to formulate policy and/or to bring others' policy proposals forward to the Board for approval. The proposals that he brought to the Board's attention were those he thought warranted approval; his job then was to convince a majority of Board members to agree with him. But first, where did the policy proposals that he brought to the Board originate? And, what strategies did Lorimer employ to increase the likelihood that those proposals would be approved?

New ideas for policy proposals often emerged out of recent developments and practices in the field of education. Some ideas were applicable to Winnipeg No.1; others were not. But good ideas are where one finds them. And, so, Lorimer began to look outside of Canada for inspiration.

> One of the basic things a leader must do is to provide new ideas and new directions and new proposals that seem appropriate for the situation and so one of the things that I spent considerable time and effort doing was looking at new ideas and new proposals. I did a good deal of reading. I did a tremendous amount of reading when I was at Columbia to develop, to get familiar with the aspects of education that my previous career hadn't really touched on, and so as a result of that development and...attending meetings of the superintendents and the Canadian Education Association

> of deputy ministers to accumulate ideas from these people as to what was happening in their divisions and to read annual reports of deputy ministers and superintendents in other cities in Canada not as much in the States, because in spite of everything the educational milieu and philosophy in Canada is somewhat different from America. I've read, of course, as well publications from Britain to see what they were doing; but again what they were doing in Britain, well, some of it had more relevance than some of the things they were doing in the States.[98]

But as Lorimer observes below, many of the proposals that he brought to the Board's attention for approval originated with others, such as his two assistant superintendents: Art Thomson and Gordon MacDonell.

> Art Thomson and Gordon MacDonell, as the main people in the system, as far as education was concerned, were both capable people and both had many good ideas, as many as it was possible for us to incorporate into the system and did. They were bringing forth a lot of proposals which developed. I supported everything that we proposed to the Board of course, but many of those proposals were as a result of those two people. I strongly proposed trying the Cuisinaire Method, which Art agreed would be worth a trial, and we did. Gordon was very strong about improving the school libraries and they needed to be improved. We were able to persuade the Board to appoint Harry Newsom as the Director of School Libraries. Working together, Harry and Gordon made proposals to the Board to improve school libraries in the elementary schools. I was part of the process, but the original impetus for the library program came about as a result of Gordon's work as a teacher and principal and his knowledge of how the schools were functioning, and of what could be done.[99]

He further observed:

> Someone would bring forward a proposal and we would discuss it and then decide whether to go ahead with it. We might not decide that in the first meeting, when it was being discussed but after, if it was something that was complex and required deeper study...we'd have discussions until we refined what our position was and then depending on whether it was something that we felt we could do or do that was new or stop doing what was old, we'd go ahead and do it. If it involved the Board,

> then we would bring forward a proposal to the Board. A lot of matters relating to the operation of the system were matters that got discussed in the presentation and discussion of the budget, because almost everything involves money.[100]

Yet, policy proposals also originated with Board members. Lorimer recalled that one Board member, Joe Zuken, was largely responsible for the start-up of the nursery program, but he needed a little help from Lorimer to get the Board to approve it.

> Mr. J. Zuken persuaded the Board to get permissive legislation from the provincial government to be able to offer pre-school kindergarten nursery classes. He then proposed that some of these classes be established and indeed we did....There were a lot of trustees on the right hand side of the Board who didn't agree with doing some of these things...I remember saying, we are not going to come forward with a proposal that nursery classes be opened in the schools in River Heights. We are going to bring forward proposals that classes be started in the core city and the south part of the north end of Winnipeg where the need seems to be. So, by emphasizing the needs of children and by saying that these classes do not provide mothers with free time but do provide children with opportunity - the nursery classes got approved.[101]

Lorimer explained the small part he played in convincing the Board to approve the start-up of the nursery classes.

> It was a result of Joe Zuken's initiative that the nursery classes got approved. One of the things, very often, is to persuade somebody [trustees] that what we are proposing is not something new but has been tried and successful, or is still being worked on in other places.[102]

Created during the war as a response to the needs of the growing number of women working in war-related industries, the day nursery program provided care for children two to six years of age.[103] The Reavis Report observed that only 50 percent or six trustees surveyed in 1947 indicated support

for nursery classes as well as instruction for mothers in methods of child-care.[104] But where others had failed, Zuken succeeded, with some help from Lorimer, and the Board approved the introduction of a few start-up classes. The first nursery classes in Winnipeg No.1 commenced in 1965, at which time Zuken was no longer a Board member.[105]

The Reavis Report had recommended that the role of the superintendent as educational leader should be to help the Board formulate policies that were in harmony with the provisions of The Public Schools Act. Norrie observed that Board members began to rely, increasingly, on Lorimer's leadership and advice in order to ensure that their proposals were in keeping with the Act, as he explains here.

> Trustees would initiate proposals in terms of a variety of issues within the schools and invariably the Board would, before debating them, refer them to the administrator [superintendent] for comment. The idea being - is this suggestion feasible or what would the implication be if this was adopted? Or what would the implication be if this was not adopted? In other words, an analysis from the administrative perspective as to the importance of this suggestion being made into Board policy.[106]

With the passage of time the Board members began to accept Lorimer as their educational leader; they expected him to lead (give them advice and counsel) and he did. Though he may have provided leadership, it did not mean that the policy proposals he brought to the Board were always approved, as Norrie was quick to point out:

> There were times when he [Dr. Lorimer] would propose programs or expenditures which often were debated hotly by the Board and sometimes didn't get through, and sometimes did, because his main thrust was what was

> best for the students; what was best for the Division in terms of providing the best educational experiences we could....It was a healthy tension. Tension is always there and I think it is a good thing that it is. You wouldn't want the educational leader, the superintendent, to come along and say, how much do you want to spend and I'll build you a program around that. Better the other way, to say this is the best program that we can give you. This is what it is going to cost. Then the dialogue starts between the trustees and the administration of the Board.[107]

The general consensus among those interviewed for the study seemed to be that most of the proposals that Lorimer brought forward to the Board were approved, because they were deemed to be "acceptable." A proposal may start with a bright idea, but what crucial element is needed to make it acceptable? Lorimer offered this insight:

> One doesn't succeed in the job as school superintendent by making very bright proposals that get turned down, because pretty soon you create the impression that you don't know how the world works, so that could be very limiting, or you really don't propose anything until it is already too late, or until everyone has already tried it, but at the same time you temper your proposals with reality....One of the things that any school superintendent has to do, is to take account of the realities...Because if you bring forward proposals that keep getting turned down, if you let that philosophy underlie everything you are going to do, you are not going to get very far either.[108]

To get proposals approved, Lorimer had to understand what was politically feasible, and this required him to anticipate reactions, as well as building support for proposals. One might also assume from Lorimer's comments that there were consequences for superintendents who developed acceptable proposals, just as there were consequences for superintendents who developed unacceptable proposals. To increase the likelihood that a policy proposal

would be approved, Lorimer emphasized to his administrative staff that their proposals should not only take account of current realities, they should also improve education generally in Winnipeg.

> Our job was to develop policies to put before the Board which we thought would be good for the children in the schools and for the City to make changes and advances, so we were at all times developing proposals and considering new ideas. Some were more important than others but on the whole, we made proposals that we thought would improve education generally in the City. In some cases, these would improve conditions for certain groups in the City who needed special help, or consideration, or special opportunity to be able to advance in a normal way because as you know, children who get a good start even before school, but in the first few years of school will do better than those who get a poor start.[109]

To illustrate the importance of the superintendent's leadership role in the development and implementation of policies approved by the Board, Lorimer explained why he decided to resist the opportunity to introduce an even larger number of nursery classes when Zuken's proposal was approved.

> Those who were all in favour of nursery classes thought that was a timid way to propose it; why don't you put nursery classes in all schools in the core city rather than just a few to start? Two reasons: one, we and the teachers of those classes need to get some experience in this area so we know the best way of doing it. And the other, to make that kind of proposal at this juncture, because it is experimental, and we have lots of other needs in the school system; we don't want to go rushing off in an area that is new and a little bit untried. We need to remember that the whole educational operation in Winnipeg has to hang together in order to provide the best opportunities that we can propose for all students.[110]

Lorimer always insisted that policy proposals should be relevant, feasible, affordable, practical, and also

reversible. And, whatever was approved must not obstruct the operation of the Division as an entire system.[111] For example, if a change in the operation of the system was to be introduced, Lorimer's job, as he explained it, was to ensure that it meshed smoothly with the machinery of the system at each level: technological, managerial (administrative), and institutional. In other words, change for the sake of change should be avoided. Nor should planned changes alter the course and overall direction of the system, or undermine its legitimacy. Rather, policy proposals should in some way enhance the over-all operation of the school system.

A potent strategy employed by Lorimer to increase agreement among Board members about the changing functions of the School Division and to get them to see his point of view (and indeed to recognize his leadership) was to "socialize" School Board members, especially the chairman of each new Board, as he explains here:

> And so I always had a closer relationship with that person than any of the other trustees because of the organizational structure and it was necessary and desirable to keep in close touch with the chairman of the board in order that we would know what that person's thinking was as a reflection of the whole Board, and to explain to that person why we were doing such and such or recommending so and so, or what proposals they might want to bring forward and so in a sense it was a continuing process as a result of the close relationship.[112]

Although Lorimer did not seek a close relationship with other trustees, he did meet with members informally at School Board retreats he organized to strengthen the ties

that bound them all to their common purpose. There would be no point to an informal gathering if the individuals involved were not able to talk freely about what they valued or believed, or about fairness, support, appreciation, honesty, and what's right and what's wrong, or about what each expected from the other. Meetings of this nature afforded Lorimer the opportunity to articulate harmony and conformance between trustees' values and beliefs and his leadership behaviour in light of contextual realities at work in the school system. The retreats afforded all an opportunity to discuss critical concerns under their direct control, and may have helped trustees to understand that their superintendent need not be an authoritarian expert whose job it was to teach people the "correct" view of reality. As Norrie suggests below, Lorimer helped trustees to gain more insightful views of current reality, and even to restructure their views so that they saw what he thought really mattered and perhaps to see new possibilities for shaping the school system in different ways. But was he successful? When asked to say whether or not Lorimer was able to motivate, guide, and influence trustees' actions, Norrie replied:

> I think a lot of it was done informally in the sense that we would have Board retreats. We would get out of the Board room and we might spend a couple of days together, say on a weekend, or we might go to a conference center and have an informal seminar amongst ourselves with his leadership and other members of the administration. Out of the formal setting and out of the ear of the press, you let your hair down and you get to know the individuals. During a lot of these sessions he would just gain further respect. He'd get

> to know the trustees and the trustees would get to know him and in that way would come to understand, I think, where he was often coming from....I think that the other thing was that he had a very, very strong relationship with the teaching staff and was respected amongst the teaching staff. That certainly enhanced his ability to reflect on conditions of the teaching profession. Problems that were there - programs that were working, programs that weren't working, and so he maintained a very strong liaison...we came to believe that this was a very important reflection of what was really happening out where it matters, in the schools.[113]

Having attended such meetings himself, Norrie observed that Lorimer's ability to relate to all trustees as individuals "really drew the Board closer together."[114]

Lorimer further exerted his leadership as CEO of the Board by cautioning Board members not to take any precipitous action that might endanger the operation of the School Division in any way. Lorimer counseled trustees to proceed cautiously (incremental steps), so that new knowledge (insights) acquired from the experience of operating nursery classes, for example, might be used to inform future recommendations (and leadership behaviour) regarding the implementation of progressive changes in educational programs, and to acquire an understanding of the constraints and opportunities that not only accompany the implementation of any new program (the process of reflection-on-action and reflection-in-action), but also shape one's leadership role.

Lorimer worked with seven Boards, six chairs, and many trustees over a period of thirteen years. By all accounts his relationship with each Board was collegial. He was

responsive to elected political officials, but at the same time he influenced their decision-making (often in informal ways) in ways that were meant to bind their loyalties and aspirations to larger issues embodied in the policy proposals that he brought forward for approval.

Conclusion

The concern in this chapter was to determine whether or not Lorimer's actions matched those of the conservator. If they did match, one might reasonably conclude that the primary motivation behind his actions was to preserve institutional integrity. At the very outset of this study, Lorimer was asked to say what his primary motivation was. He said:

> The School District of Winnipeg No.1, partly as a result of historic development in the City, was already a good system. So, what was needed to some degree, was preservation and development of that system. As time went on, there was also a need for change and development because situations change, thinking changes, knowledge becomes broader, and, in turn, the needs of the system and the needs of some groups of students and teachers require strengthening or development...If all one does is to preserve the existing, then of course, there is only one direction to go and that is down.[115]

Lorimer's comments strongly suggest that his primary motivation was similar to that of the conservator in that he claimed to be driven by a continuous need to preserve (or to strengthen) the existing system, underscored by an inclination towards controlled adaptation to changing circumstances.

The next step was to examine his behaviour with an eye to answering each of the research questions of this study. Let us consider the first question.

Was the mission of Winnipeg No.1 conserved?

Lorimer established a much-needed Code of Rules and Regulations that contained a mission statement. In effect the mission of Winnipeg No.1 embodied the authority (of The Public Schools Act) to educate resident pupils of The Winnipeg School Division No.1 - in keeping with the spirit and letter of the law. He conserved mission when he took action to ensure that the system's ability to educate children was not diminished by the increase in pupil numbers that necessitated the implementation of a multi-million dollar building program. Lorimer conserved mission by expanding the curriculum, by leading the way to find 26.7 million dollars needed to drive the program (twenty-four new schools were built between 1949-1966), and by resisting the potential threat to the geographical integrity of Winnipeg No.1, posed by the Royal Commission's directive to re-organization school boundaries in Manitoba. Based on this evidence, it can be said that Lorimer did conserve mission.

Were values conserved?

Lorimer's executive cadre members were capable individuals and their skills, behaviours and dispositions served to protect core values. Core values were conserved. Specific values included the establishment of a library system, recruiting appropriately qualified teachers, improving

teachers' performance, and the re-affirmation of certain democratic principles of a democratic society, namely the removal of an offensive verse from use in the schools of Winnipeg No.1.

In terms of his executive cadre, Lorimer built and maintained trust between himself and cadre members. He took up their causes, he supported their decisions, and he ensured that his cadre was appropriately composed in terms of complementary skills, attitudes, and behaviours. Further, he relied on his senior staff for their insight, advice, and wisdom. It can be said, then, that he conserved values.

Were supports conserved?

Lorimer created and maintained a favourable public image. Indicators of performance were accurate and meaningful. Lorimer ensured that the system complied with established standards of performance. He also sought to bind the aspirations and loyalties of Board members to larger institutional aims of the system by developing a relationship with the Board characterized by honesty and trust, and openness. By all accounts, Board members came to see Lorimer as their educational leader. Yet, he also sought to influence their decision-making in ways that he thought served the public good. Supports were given. They included, for example, government grants (capital and operating) and textbooks, which were supplied to the Division (after 1958)

at no cost to the Division. Thus, it can be said that he conserved support, because supports were given.

Finally, since this study is a "case study" of Dr. Lorimer's leadership, the objective was not to find the correct or true interpretation of the facts with respect to his primary motivation, but rather to eliminate erroneous conclusions so that one is left with the best possible, the most compelling interpretation of his behaviour. The three critical functions performed by the conservator to preserve institutional integrity are not random behaviours; rather they comprise a gestalt of behaviour that is purposive, directive, and indicative of an enduring motivation aimed at preserving institutional integrity, and in Lorimer's case the most compelling evidence as to the primary motivation behind his actions is that his behavioural pattern matches that of the conservator in that he performed not one, but all three critical functions. In other words, Lorimer's actions were deliberate, purposive, and unmistakably aimed at preventing changing conditions from eroding the institutional integrity of Winnipeg No.1. The best possible, most compelling explanation for his actions is that his primary motivation was to preserve institutional integrity.

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CHAPTER 5

CONCLUSION AND RECOMMENDATIONS

The purpose of the case study was to determine whether Dr. Wesley C. Lorimer's behavioural pattern, during the time when he was Superintendent of Schools of the Winnipeg School Division No.1 from 1952 to 1966, matched the behavioural pattern prescribed by Larry Terry for his model of the administrative leader as conservator. Such leaders take actions intended to preserve institutional integrity, which is their primary motivation. The study confirmed the applicability/relevance of Terry's model to the leadership behaviour of Lorimer.

This chapter summarizes the main findings of the study. It sets out the theoretical framework and methodology that were used in the study. It also highlights the major accomplishment of Dr. Lorimer's long and distinguished career. A summary of what he did to conserve mission, values, and support is presented. The utility of Terry's model is discussed, and suggestions are offered as to how it might be refined. Last, the implications for theory and practice that emerge from the study are presented. Let us begin by setting out the theoretical framework used in the study.

Theoretical Framework

In Terry's theoretical framework, bureaucratic leaders have a guardianship role and a legitimate concern for the enduring capabilities of government - its institutions, processes and staff - and the values that underpin and support them. Bureaucratic leaders must be responsive to political leaders (who may want to change the organizations, functions and processes of government), but they also have a responsibility to be faithful to and preserve institutional integrity - the wholeness and persistence of administrative processes, value commitments, and unifying principles that determine an institution's distinctive/core competence - the special capacities and proficiencies possessed by an agency that bind specific activities and processes to the achievement of a specific enterprise or course of action. Though the pre-eminent goal of the conservator is stability or continuity, Terry's conservator is prepared to pursue innovative courses of action or leadership at certain points in an organization's history. Always, the conservator's main objective will remain the preservation of institutional integrity. Conservators are also faithful to and strive to preserve the distinctive values and principles of the public service. In order to preserve institutional integrity, the conservator may be called on to perform a continuum of leadership roles ranging from initiator to protector in response to prevailing conditions. Conservators concentrate on the management of evolutionary or incremental changes,

but at other times they may be required to defend or to strengthen existing institutions or values. Finally, to ensure the continuation of the agency's programs and activities (and to preserve institutional integrity), conservators perform three critical functions: conserving mission, conserving values, and conserving support.

The critical elements of Terry's model afford a useful way of thinking about the style and purpose of bureaucratic leaders. However, what was still needed was a method with which to collect data about Lorimer's leadership that could not be collected through observation.

Methodology

Since the main concern in this study was to achieve an in-depth understanding of Lorimer's leadership, and then to compare and contrast his behaviours to those assigned to the conservator, a case study approach was deemed to be most appropriate. Two primary data sources were critical: documents and interviews with Lorimer and selected respondents including past chairmen and chairwomen of the Winnipeg School Division No.1. Eleven interviews were conducted with Lorimer; he provided the writer with copious recollections and documents from which to construct the case study. So in this sense he provided the writer with knowledge of past events and also of practices that were central to our democratic system of governance. Documents studied included the ANNUAL REPORTS of the Winnipeg School

Division No.1 (1949-1966), newspaper articles contained in Winnipeg's two local newspapers: the Winnipeg Free Press and The Winnipeg Tribune from 1949-1966, the Reavis Report, articles written by Lorimer, the Code of Rules and Regulations, selected Minutes of School Board meetings contained in BOARD MINUTE BOOKS (in-camera Minutes for 1946-1966 were not retained by Winnipeg No.1), and the BRIEF PRESENTED TO THE ROYAL COMMISSION ON EDUCATION by the Trustees of The Winnipeg School Division No.1 in November 1957.

Data collected were used to corroborate Lorimer's testimony and the accuracy of his recollections of how he exercised his leadership, and also to reveal the contextual circumstances challenging the integrity of Winnipeg No.1. The newspaper articles proved to be an especially useful source of data in terms of shedding light on Lorimer's beliefs and concerns about education, and, indeed, about his outlook and purpose as superintendent of Winnipeg No.1.

The Preservation of Institutional Integrity

The overarching question in this study was: To what extent does Lorimer's behavioural pattern match that of the conservator? It was determined that Dr. Lorimer's behavioural pattern did match closely the behavioural pattern prescribed by Terry for the conservator. This conclusion was reached by comparing Lorimer's real-life behaviour to the three critical functions performed by the conservator to preserve

institutional integrity, namely, the conservation of mission, values, and support. Let us turn now to a brief examination of what Lorimer did with respect to each key function.

Conserving mission. As Director of Research and Personnel in 1949, Lorimer was assigned the task of developing a Code of Rules and Regulations to replace the Operating BY-LAW No.333 (1943) when Winnipeg No.1 switched from a multiple type of organization to a unitary type. The new Code placed responsibility for the operation of the entire school system into the hands of the superintendent. A critical aspect related to the development of the Code was that it should embody the relevant mandatory practices set out by The Public Schools Act. In other words, the provisions of the Code should be in keeping with the spirit and letter of the law. Lorimer's job, then, was to examine the present system, the rules and regulations governing the duties and responsibilities of executive officers, supervisors, principals, and teachers in order to develop and coordinate the efforts of all School Board employees toward the achievement of the Division's mandate: to educate its resident pupils. The new Code was adopted in 1954; it contained a mission statement that embodied the executive authority required to educate the pupils of Winnipeg No.1

However, substantive increases in pupil enrolment after World War II (baby boom and immigration) focused attention on the school plant's capacity to accommodate the steadily growing

school population. The Reavis Report indicated that the condition of the Division's school plant had deteriorated to the point that many buildings (14) should be razed immediately. Lorimer's job was to establish a building program to be financed through the money by-laws. Lorimer led the way to find 26.7 million dollars needed to ensure that the school plant's capacity to afford students a proper learning environment was not undermined. This he did. In doing so he enabled the Division to continue to provide its pupils with an adequate education. At the same time, Lorimer also led the way to an expanded curriculum.

As a result of the REPORT OF THE MANITOBA ROYAL COMMISSION ON EDUCATION, Winnipeg No.1 was threatened by a potential change in its boundaries. However, this threat to institutional integrity was not realized. The Board through its agent, Dr. Lorimer, presented a BRIEF of 34 recommendations for the Royal Commission's consideration. The School Board indicated support for the work of the Royal Commission, but also pointed out to the Commission that the Board did not want the boundaries of Winnipeg No.1 changed. The Royal Commission agreed. Moreover, as it had requested, Winnipeg No.1 was provided with free textbooks. In addition, a new system of grants enabled the School Board to raise salaries to the maximum level for teachers. The next critical function performed by the conservator is conserving values.

Conserving values. Conserving values is such a time-consuming and difficult function that it must be shared with members of the executive cadre. Lorimer conserved values by concentrating on his relationship with administrative team members; and by ensuring that his executive cadre remained viable so that members of the cadre might assume a large portion of the responsibility for protecting core values, and for transmitting them to new members through in-servicing, interpersonal contacts, and through daily communications.

The concept of an "executive cadre" requires that the leader match specific members of the cadre to a given situation or task, based on his/her understanding of the requirements of the situation and his/her understanding of each member's capabilities. Since each situation is different, the composition of the executive cadre is likely to vary from one situation to another.

To ensure that his cadre was viable, Lorimer encouraged his administrative staff to pursue professional development opportunities. He also provided opportunities for members to attend conferences and conventions that exposed members to new ways of thinking about educational leadership and innovation that might inform their own practice. At the same time, Lorimer sought to build and maintain high levels of trust between himself and cadre members by using certain sub-strategies that included: honouring formal or informal

commitments made with cadre members, taking up the causes of cadre members, and supporting members' decisions when called on to do so.

Lorimer relied on his senior staff members (Art Thomson and Gordon MacDonell) to achieve certain key objectives, such as recruiting qualified teachers both in Canada and Great Britain in light of the significant increase in student enrolment at the secondary level during the 1960s. Certain team members were especially capable, and Lorimer worked to establish high levels of trust and commitment with these individuals. The comments of Lorimer and MacDonell revealed that Lorimer, Thomson, and MacDonell worked well together in large part because their working relationship was based on friendship and commitment to core institutional values.

Lorimer's senior staff also conserved values by striving to improve teachers' performance through professional development, in-servicing, and interpersonal contacts. Teachers whose performance could not be improved were encouraged to seek alternative means of employment. Lorimer's role in this regard was to try to persuade these individuals that they were in the wrong profession. If they agreed to resign, there was no need to pursue the matter further. Cadre members trusted Lorimer. Values were conserved due in large part to the fact that Lorimer's cadre members were already committed to core institutional values, such as those embodied in the mission statement.

In addition, the Code of Rules and Regulations as developed by Lorimer provided staff members with sufficient autonomy not only to protect institutional boundaries, but also to preserve the core institutional values that defined the school system's distinctive competence. In contrast, conserving support is necessary to acquire the resources needed to ensure the continuance of institutional programs and activities.

Conserving support. Resources acquired from external supporters are needed to ensure the vitality and extension of valued organizational programs and activities, and the superintendent has a vital role to play in securing different resources ranging from money to social legitimacy. For example, Lorimer solicited the support of members of the Chamber of Commerce to ensure that the money by-laws for the building program were approved by 60% of the electorate.

In addition to securing essential resources, it is vitally important that the school system is not seen to be acting inappropriately. Maintaining a favourable public image, therefore, is a vitally important function necessary to maintain the support of external allies. Statistical information contained in documents earmarked for public distribution had to be both meaningful and accurate in order to reassure supporters that the school system was meeting or exceeding established standards of performance.

In the case of Winnipeg No.1, fostering a favourable public image through the publication of the ANNUAL REPORTS reassured supporters and potential supporters that the system's functions and processes were consistent with supporters' expectations and needs. Conserving support might also require the leader to address situations that would damage the favourable public image of his/her institution. For example, Lorimer was put into the position of having to deal with a situation in which a school band from Tec-Voc High School was paid to perform at a political rally for John Diefenbaker. Lorimer condemned the use of the band, because he did not want the school system to be perceived as political either by valued external supporters or the public-at-large. His swift response in condemning the inappropriate use of the band may have reassured supporters not to discontinue their support.

Conserving support also requires that the conservator bind organizational members' aspirations and loyalties to larger institutional aims, such as providing all resident pupils of a school system with the best possible education. If education was to be seen by Board members as a valued objective then, Lorimer's job was to secure their support.

Since the Board was politically fragmented, Lorimer decided to develop a relationship with members based on honesty, openness, and the dissemination of information that trustees needed to determine whether a policy recommendation

warranted approval. An important strategy used by Lorimer to obtain trustee support for the value of education and to set aside their political differences, was to socialize Board members at retreats held at Falcon Lake, for example. The testimony of former trustees of Winnipeg No.1 confirmed that Lorimer could be very persuasive, and that he succeeded in binding Board members' aspirations and loyalties to larger institutional aims, such as the value of education. This should not be interpreted to mean, however, that every proposal he brought forward for approval was approved. Policy proposals were successful, in the main, because they were practical.

The foregoing examined Lorimer's successful efforts to conserve mission, values, and support. According to Terry, these functions indicate a motivation aimed primarily at preserving institutional integrity. It can be said, therefore, that Lorimer's primary motivation was to preserve institutional integrity.

In light of Lorimer's success and all that he accomplished during his career one might ask, what was the highlight(s) of his leadership career? Perhaps it is enough to say that Lorimer assumed responsibility for the operation of Manitoba's largest school system, and that he was successful. In addition, his administration occurred at a time when conditions in society were in a state of flux. Industrialization and technology imposed new and complex

demands on the school system that had to be met so that students would be adequately prepared for a workplace that was vastly different from the one that their parents had known. These challenges were met, thanks in large part to Lorimer's leadership. The School Division delivered a total instructional program that addressed the evolving educational needs of the community it served. However, since there were many highlights in his career, the writer decided to ask Dr. Lorimer himself what he considered to be the most significant highlight of his career.

Dr. Lorimer's reply was different from what one might have expected in view of the important role he played in finding the money needed to drive the building program. He said that the highlight of his career was the role he played in the expansion of the Child Guidance Clinic. The Clinic was a joint creation of The Winnipeg School Division No.1 and the Department of Health in 1941. The Clinic is, however, administered by the School Division; it is comprised of five departments: social work, psychology, reading, speech and hearing, and psychiatry. In 1951, the School Board of Winnipeg No.1 accepted a proposal from the Department of Health that provided for the expansion of the services of the Clinic to suburban areas and for some expansion of the services in Winnipeg. The expanded Clinic would then operate under the auspices of the Winnipeg School Board and the Provincial Department of Health and Welfare, and with the cooperation of the City Health Department. With the

exception of the medical director, all staff members were to be appointed by the Winnipeg School Board on the Director's recommendation to the superintendent.

In 1952, Lorimer was appointed acting superintendent. Thus, staff appointments were subject to Lorimer's approval. But this does not explain why he maintained that the expansion of the Clinic was the centerpiece of his leadership career. When pressed to say exactly how he had contributed to the Clinic's expansion, Lorimer explained that thousands of children had received service in some form from the Clinic. He further explained that as superintendent, his role was to create a climate among staff of positive development and change. Since the Clinic was still expanding in 1959, Lorimer saw his role as one of nurturing the positive climate needed to sustain further expansion, so that an even greater number of children might benefit from the services offered by the Clinic.

Dr. Lorimer as Conservator

The data used in the study provided evidence that the 1950s and early to mid-1960s was an especially good time to be an educational administrator. The main problems confronting Lorimer were increased pupil enrolment, his relationship with the Board, developing the Code of Rules and Regulations, and ensuring that the capacity of Winnipeg No.1 was strengthened. Still, Lorimer was advantaged by a broad tax base that afforded him considerable latitude to expand

the range and type of programs offered to students in Winnipeg No.1. At the same time, the public was favourably disposed towards education and towards educational administrators. Many supports from many different sources were given to the School Division. In other words, his ability to perform the critical functions of the conservator was facilitated, not obstructed.

Lorimer described himself as an initiator, as a transformer, and also as a protector of past practices and functions that he believed ought to be retained to ensure that the teaching and educating functions of Winnipeg No.1 were not diminished. According to Terry the institution builder, innovator, and transformational leader are identifiable forms of initiating leadership. So when change was required, Lorimer became an initiator of change. At the same time, however, he employed transformational effects to build a collaborative culture, especially among members of his administrative staff who comprised his executive cadre. Lorimer approached change cautiously/prudently. Nor was he given to wholesale changes without first consulting with others (usually Art Thomson and Gordon MacDonell as his senior staff members) in order to consider whether or not such changes were feasible. Change for the sake of change was to be avoided. Incremental or evolutionary changes were preferable. And like the conservator, Lorimer sought to ensure that the system performed its mandated role in keeping with the spirit and letter of the law.

Lorimer was also responsive to elected political officials. There is no testimony from any of the interviewees in this study that he attempted to mislead Board members; rather he heeded the Reavis Report's recommendation that the relations of the superintendent and his board be that of a responsible executive to a board of directors who exercise legislative and judicial responsibilities. Lorimer understood that the position of superintendent ought to be non-political. He also understood that the Superintendent must be both responsive and accountable to the Board. Faced with the onerous responsibility of having to unite a politically fragmented Board around the core institutional value of education, Lorimer succeeded. He was successful because the Board members eventually came to see Lorimer as their educational leader. Most importantly, they expected sound advice and good counsel from Lorimer and he provided it.

Furthermore, Terry has said that conservators ought to have a legitimate role in governance. As superintendent Lorimer was required to anticipate Board concerns, and then to address those concerns through the formulation of policy recommendations to be approved (or not) by the Board. So, in this sense, Lorimer did play an active role in organizational governance, as set out in the Code of Rules and Regulations. In view of Lorimer's participation in governance, one might conclude that senior level bureaucrats do indeed have a legitimate role to play in governance, as

Terry has suggested. On the other hand, Lorimer's participation in governance would seem to indicate that the idea of bureaucratic leaders as active participants in governance, who are also responsive to elected political officials, does not seem to be that original/new after all. Still, it should be acknowledged that Terry has set a very difficult-to-achieve goal: blending insights from legal, political science, management, and sociological literatures to advance a theory of leadership in public bureaucracies. Let us now consider the utility of Terry's model and how it might be further refined.

The Utility of Terry's Model

Terry's model is not only valid in the sense that it is usable, but it also addresses the lack of serious theoretical groundwork required to better understand public sector leadership. Terry has provided a useful foundation from which it is possible to fashion reasoned, rather than colloquial, argument. Moreover, his model can be refined, as he intended it should be, and since it is a normative theory of public administration the refinements proposed in this section are aimed at specific aspects of each of the three critical functions performed by the conservator to preserve institutional integrity. The first function performed by the conservator is conserving mission.

Conserving mission. Conserving mission requires that the conservator devote considerable time and energies to

preserving both executive and non-executive authority vested in public bureaucracies. The conservator must also ensure that the agency's activities and actions do not violate the spirit and letter of the law. Strategies useful for this purpose include the interpretation of legal mandates, the education of personnel, and the judicious use of rule making and adjudication. The conservator should prudently and strategically exercise discretion as a means of being responsive to elected political officials and the public at large. The conservator should also protect jurisdictional boundaries, and remain trustworthy and honest in carrying out official duties and ensure that all agency employees do the same.

It is easy to see why conserving the mission of public bureaucracies is such an important responsibility, and, thus, why Terry assigns this task to the conservator. However, as conserving mission is both a complex and multifaceted function, one has to wonder if the conservator-type leader, as proficient and scrupulous as he/she may be, can perform this function effectively without considerable help from his administrative team. The refinement suggested here, then, is that the conservator should make better use of his team members' experience, knowledge, and skills to conserve mission. As it is, superintendents tend to be extraordinarily busy; hence time itself is a constraint on the exercise of their leadership. Perhaps key members of the executive cadre might be assigned specific duties related to

the conservation of mission that would provide the conservator with more time (and energy) to conserve values, for example.

Conserving values. Conservators must have considerable assistance from team members to conserve values, defined as "objects of desire" that are capable of sustaining group identity. Conservators must ensure that the cadre is viable, committed to protecting core institutional values, and that it is appropriately composed in terms of members' orientation, educational background, age, and gender with respect to the agency's core technology, its stage of historical development, and level of administrative action. Hence, the demographic composition of the cadre is critical; it should also reflect the agency's core values and field of action. Conservators may use different strategies to build and maintain commitment among cadre members. The most useful of these include using inducements (extrinsic and intrinsic) and persuasion, minimizing dissension among members, and building and maintaining high levels of trust between the conservator and members of the executive cadre. Though Terry does not use the term collaborative culture, presumably he would agree that the conserving leader should build a vital organizational culture that complements agency mission.

But in order to build a viable professional culture, the leader should attempt to determine whether team members are appropriate with respect to character, outlook, and purpose.

Lorimer was advantaged in that he had the measure of most of his administrative team members before he was appointed superintendent of schools in 1953, having worked with many of them since 1949. In other words, Lorimer did not have to adjust the composition of team members, because his team was for all intents and purposes already appropriately composed in terms of skills and perspective. Part of the reason that Lorimer was so successful had to do with the fact that his team members were scrupulous individuals, and partly because team members were capable individuals who were already committed to core institutional values. How, then, can the conservator determine whether his team members are of good character - before he appoints them?

The answer to this question depends on how much time the conservator can devote to recruitment, and to what lengths he/she is prepared to go in order to find capable but also scrupulous people. Still, having initiated background checks on the character of prospective team members, can one really be certain that a newly appointed member of the team is appropriate with respect to character, outlook, and purpose? Lorimer had no doubts whatsoever about the trustworthiness of his team members or their ability to take initiative - to be leaders. And while he used certain strategies to build commitment and trust between himself and his team, the key to his success was an uncanny ability to surround himself with the best people. Ultimately, the function of conserving values (and ultimately of preserving institutional

integrity) might be better served if the conservator spent more time in pursuit of the best people, first, which, in turn, would reduce the number of strategies needed to ensure his/her cadre was both viable and appropriately composed.

Conserving support. Conserving external and internal support is necessary to ensure that the life and vitality of an organization's programs and activities. An important strategy used by the conservator to conserve support from external supporters is the maintenance of a favourable organizational image. There are different strategies that the conservator might use to achieve this objective, such as the publicizing of characteristics of the organization that are thought to insure quality. Indexes of quality intended for public distribution are usually included in official documents prepared by an organization or in its annual reports. Clearly, this information must be both meaningful and accurate in order to secure support from external sources. Another strategy that conservators ought to use to build and sustain support is the media.

Though Lorimer unreservedly exploited the media's (local newspapers primarily) availability to build support for Winnipeg No.1, some bureaucratic leaders are reluctant to use the media (newspapers, radio, or television) because something might be reported that generates acrimony not support, and because they would rather be seen as professionals than as politicians. Hence, the conservator

must exercise caution in his/her dealings with the media in its different forms. Still, the media can be a supremely effective conduit through which to publicize indexes of quality that build prestige for the organization.

Recommendations for Theory and Practice

Theory. Currently in educational administration the focus is on the local school system and its immediate environment and on the processes within a given system. Perhaps it is time to focus on the bigger system within which schools/school systems are embedded. The research on schools then would focus on the broader environment that might include, for example, public and private sectors of schooling and the societal context of schooling. Only with much better knowledge of how these organizations function can we gain important insights into the organization and operation of local schools by their educational leaders.

Further, because institutionalized patterns of action do not emerge or stabilize quickly research on education will require observing events over longer time periods. This will necessitate a rethinking of researchers' practices. In a system where change is pervasive, studies of change efforts might be best understood as studies of institution building. For example, the only way to know if a reform will be institutionalized is to keep an eye on it after it has been implemented. This requires time and observation, but affords

the observer/learner an opportunity to determine what effects different reforms will have on the structure of educational organizations as well as the practices in them.

Finally, at one level, theory building requires knowledge of current institutions, that is, the tacit ideologies that organize the way we think about and act in educational environments, the norms and values that encourage particular forms of educational practice, and the regulatory constraints that structure schooling. But, at another level, practitioners also need the kind of knowledge that can only be acquired by changing the focus of preparation programs from making researchers to creating practitioners. With that objective in mind, let us turn now to a consideration of the new Educational Leadership Constituent Council (ELCC) standards in light of the examination of Dr. Lorimer's leadership career.

Practice. Dr. Lorimer's actual period of incumbency in Winnipeg No.1 was seventeen years (1949-1966). His leadership embodied practices that were central to our democratic system of governance, and it would appear that such practices continue to be of vital importance for current educational leaders. They match well with the Educational Leadership Constituent Council standards (ELCC) described by Elaine Wilmore in Principal Leadership. ELCC is a consortium of American educational agencies that has combined the standards of the Interstate School Leaders

Licensure Consortium (ISLLC) and of the National Council for Accreditation of Teacher Education (NCATE) into one set of collaboratively developed and agreed upon standards for the professional development of future practitioners.[1] Thus, the leadership practices of Dr. Lorimer are especially noteworthy because they confirm the ELCC standards for practice by educational leaders. The standards are:

A school administrator is an educational leader who promotes the success of all students by

> Standard 1: *facilitating the development, articulation, implementation, and stewardship of a school or district vision of learning that is shared and supported by the school community,*
>
> Standard 2: *advocating, nurturing, and sustaining a school culture and instructional program conducive to student learning and staff professional growth,*
>
> Standard 3: *ensuring management of the organization, operations, and resources for a safe, efficient, and effective learning environment,*
>
> Standard 4: *collaborating with families and community members, responding to diverse community interests and needs, and mobilizing community resources,*
>
> Standard 5: *acting with integrity, fairness, and in an ethical manner,*
>
> Standard 6: *understanding, responding to, and influencing the larger political, social, economic, legal, and cultural context, and*
>
> Standard 7: *through substantial sustained, standards-based experiences in real settings that are planned and guided cooperatively by university and school district personnel for graduate credit.*[2]

The thesis writer endorses the ELCC standards for use by universities, certification agencies, professional development centers, school leaders, and leadership aspirants.

Conclusion

A great deal of time and effort has been devoted to an examination of the leadership career and behaviour of Dr. Wesley C. Lorimer, an elite public school administrator in The Winnipeg School Division No.1. It has been said that Dr. Lorimer's leadership embodied practices that were central to our democratic system of governance in the past. While this is true enough, it is also true that he would have little difficulty in assuming a leadership role in the current milieu of increased accountability. This is especially important now, because the superintendent's task could be defined as facilitating and preserving a distinctive competence of schools when school systems, programs, and ultimately people are faced with unprecedented challenges, such as downsizing, fiscal constraints, and equity issues. Nevertheless, Dr. Lorimer would insist, as Wilmore does, that leaders must provide strong, effective leadership if schooling is to continue to meet the evolving needs of the community.

Here is what Dr. Lorimer had to say about principal leadership in an article entitled Lorimer Tells Principals:

Education Not All Books that appeared in The Winnipeg Tribune in 1968, when he was the deputy minister of education. He said:

> A democratic society flourishes in direct relationship to the quality of its leaders, and perishes if its leaders are masters. You cannot honestly believe in democracy and be an autocrat. A school or a school system without some leadership is rudderless. Because of the administrative structure holding up a school or system, the machine will tend to operate - it may even seem to be functioning adequately - but it will be failing in its essential purpose. No matter what else you do, you must provide leadership. You will have done nothing if you do not provide leadership.[3]

Leadership is a calling. Some have it; some do not. Dr. Lorimer certainly had it. But, that does not mean that existing administrators cannot improve their own practices. However, instead of relying on survey questionnaires that purport to measure the effects of leadership, we should focus our attention increasingly on the practices of top-level senior executive administrators, embedded in real-life situations.

This study is significant not only because it illustrated the applicability of Larry Terry's model of conservatorship to the interpretation of one individual's leadership performance, but also because it facilitated an accurate understanding as to why it was that followers attributed leadership status to Dr. Lorimer, the extent of agreement among those attributions, and how and why, over time, those attributions were sustained and strengthened by what he did. Therefore, in order to develop more meaningful programs for the preparation and training of future leaders in

educational administration, we need to increase our efforts to examine the lives and especially the practices of elite school administrators embedded in natural settings confronted with real-life problems.

NOTES TO CHAPTER 5

[1] Wilmore, E. (2002). Principal Leadership. Thousand Oaks, CA: Corwin Press Inc.

[2] Wilmore, 113-115.

[3] The Winnipeg Tribune. 23 February, 1968.

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APPENDICES

APPENDIX A

LETTER TO DR. LORIMER

University of Manitoba
Faculty of
Education

Dear Dr. Lorimer,

I am a Ph.D. student at the University of Manitoba engaged in research for my doctoral thesis. I would like to compare your actions as Superintendent of Winnipeg School Division No.1 to those of Larry D. Terry's theoretical model of the administrator as conservator to determine the extent to which they match. In short, I am interested in what leaders do and why they do what they do.

You have been selected for this study on the basis of your distinguished career as Superintendent of The Winnipeg School Division No.1. If you agree to participate in my study, I would like to conduct ten (one-hour) interviews with you. Multiple interviews are required in order to take into account the intricacy of Terry's model. All interviews will will be transcribed and returned to you so that you may approve or amend each one. To read and amend (if necessary) each transcript will require about one-half hour of your time. Your total time commitment to this study is estimated to be approximately fifteen hours.

Although each interview will be used as data, an entire interview will not be quoted, but as it is customary in a study of this nature, specific commentary may be attributed to you unless you request that certain comments not be used, or that certain commentary may be used, provided it is not attributed to you. Further, you may elect to discontinue your involvement at any point in the study. Upon completion of the study, you will receive a hard-bound copy of the thesis entitled: "An Exploratory Study of Administrative Leadership: The Case of Dr. Wesley C. Lorimer."

As to the disposition of the tapes (audio) at the conclusion of the study, three options are available to you. You may request possession of the tapes, or you may choose to have the tapes erased. Or, you may donate the tapes to the History of Education Manitoba Archives located at the University of Manitoba. However, the tapes will be erased at the conclusion of the study, if you do not choose one of the two other options.

I should point out here that I will be interviewing others (politicians, for example) who may be able to shed light on your leadership. In addition to the interviews, I will also be examining a wide range of documents related to your leadership career.

In preparation for the interviews, I would encourage you to

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• Room 203 Education Building • University of Manitoba • Winnipeg, Manitoba, Canada R3T 2N2
Phone (204) 474-9018 • Fax (204) 474-7564 • Email education@umanitoba.ca • Internet www.umanitoba.ca/education

University of Manitoba
Faculty of
Education

bring with you to the interview session(s) any documents which you believe might serve the purpose of the study. Thus, I am interested in your recollections about what you did and why you did what you did when the institution you served was required to deal with difficult issues, change and innovation or challenging situations.

If you are willing to particpate in my study, please affirm your intention on the appropriate document entitled, Reply to the Request to be interviewed. If you have any questions or concerns about the study, please contact me at (204) (home) or (204) 474-8289 (office). If I cannot be reached, please contact my thesis supervisor, Dr. John Stapleton, at (204) 474-8581 or (204) 474-8582.

Sincerely,

John V. Brandon
Ph.D. candidate

John J. Stapleton, Ph.D.
Rector, St. Paul's College
University of Manitoba

APPENDIX B

LETTER TO POTENTIAL INTERVIEWEES

University of Manitoba
Faculty of Education

Dear

I am a student at the University of Manitoba engaged in research for my doctoral thesis. I am examining the leadership of Dr. W.C. Lorimer in order to understand how he exercised his leadership as Superintendent of Schools, The Winnipeg School Division No.1. In short, I am interested in what administrative leaders do and why they do what they do.

If you are willing to participate in my study, I would like to arrange to have a one-hour interview with you at your convenience. Your interview will be transcribed and returned to you so that you may have an opportunity to approve or to amend the transcript, before it is used in the study. As it is customary in a study of this nature, specific commentary may be attributed to you as an interviewee unless you request that certain comments not be used, or that specific commentary may be used, provided it is not attributed to you. Although the entire interview will be used as data, the entire interview will not be quoted in the study. Further, you may elect to terminate your involvement at any point in the study. The general results of the study will be made available to those who agreed to participate. At the conclusion of the study, any audio tape(s) or written record(s) of your interview will be returned to you upon request.

Furthermore, I would like to ask you to bring with you to the interview any documents or data which might help me to better understand Dr. Lorimer's style of leadership. I am especially interested in any anecdotes, incidents or issues that you may recall which could shed additional light on how he exercised his leadership, when the institution he served was confronted by new or challenging conditions/situations.

If you agree to participate in my study, please affirm your intention by completing the document entitled, Reply to the Request to be Interviewed. If you have any questions or concerns about the study, please contact me at (204) (home) or (204) 474-8289 (office). If I cannot be reached, please contact my thesis advisor, Dr. John Stapleton, University of Manitoba at (204) 474-8581 or (204) 474-8582.

Sincerely,

John V. Brandon
Ph.D. Candidate

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John J. Stapleton, Ph.D.
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APPENDIX C

REPLY TO THE REQUEST TO BE INTERVIEWED

I received a letter from John Brandon containing a description of his proposed Ph.D. study. I understand what is required of me and,

I am

am not

willing to be interviewed.

Signature_____. Date_____.

If you agreed to be interviewed, I will contact you upon return of this letter to arrange an interview at a place and time convenient to you. Would you please confirm these details:

Your Name_____ (please print)

Phone Number_____ (residence)

_____ (work)

Address _____ Postal Code

Whether or not you are willing to be interviewed, would you please assist me in making other contacts who may be helpful to my study? Thank you.

a) Their Name_____ b) Their Name

Phone No._____(res) Phone No._____(res)

_____(work) _____(work)

Address_____ Address

Postal Code_____ Postal Code

Please return your reply in the self-addressed envelope to:

Mr. J.V. Brandon
Department of Educational Administration,
Foundations & Psychology
Faculty of Education
University of Manitoba, R3T 2N2

APPENDIX D

LIST OF INTERVIEWEES

LIST OF INTERVIEWEES

A) THE WINNIPEG SCHOOL DIVISION NO.1

1) Subject of the Study:

Dr. W.C. Lorimer, Superintendent of Schools (1953-1966)

Respondents

2) Elected Political Officials: School Trustees

Bill Norrie (Chairman, 1967-1968)

Walter Paschak (Chairman, 1965-1966)

Catherine Stewart-Milner (Chairman, 1959-1960)

Dr. Isadore Wolch (Trustee, 1960-1963)

3) Assistant Superintendents:

G.T. MacDonell (1953-1972)

J. Pankiw (Deputy Assistant Superintendent, 1964-1981)

B) The respondents named below have information about Dr. Lorimer's leadership that might further inform the study.

Respondents

Dufferin Roblin (Premier of Manitoba, 1958-1969)

Arnold Reimer (Executive Director, Manitoba Association of School Superintendents, 2002)

APPENDIX E

INTEVIEW SCHEDULE

INTERVIEW SCHEDULE

Dr. W.C. Lorimer: Superintendent, Winnipeg School Division No.1

1. Theorists in public administration say that every public bureaucracy possesses its own "distinctive competence," or set of special functions, proficiencies and values that define its operation. What functions, proficiencies and values in particular were critical to the operation of Winnipeg School Division No.1? Why was it important to be faithful to, or to try to strengthen these values, proficiencies and functions?

2. The *Code of Rules and Regulations* embodied certain values and principles (democracy, equality, freedom). In light of these, what did you interpret to be your obligation in relation to students and in relation to Winnipeg School Division No.1?

3. What philosophy of leadership did you bring with you to the office of Superintendent? Or what values did you attempt to impart to others as Superintendent through storytelling, anecdotes, or even personal appointments?

4. What was the essential role of this Division? And, what did you understand to be your administrative role in the Division, including your role as CEO of the School Board?

5. The Code authorized you to do certain things in the Division, as Superintendent, but there is always a risk of exceeding one's authority. What did you understand to be the limits of your authority?

6. Successful administrators may use their influence to acquire an objective that they could not achieve otherwise. How does an administrator acquire such influence, and in what important way(s) did you use influence to attain an important purpose?

7. Successful administrators share certain personal qualities which enhance their leadership. What kinds of qualifications are required to perform the role of Superintendent effectively? What experiences or training may have helped you to lead more effectively, or to respond to challenging or extraordinary situations more effectively?

8. As CEO of the Board you were responsible for the formulation of policies and for the administration of policies that were approved by the Board. Did this mean that you alone were responsible for

policy making? What did the policy-making process consist of; who else participated in the process, and what considerations (or values) always guided the development of educational policy?

9. What instance comes to mind in which you sought the Board's approval for a policy that a majority of members seemed reluctant to give? How did you attempt to persuade these trustees to give their approval? What approach worked best when it came time to seek the approval of the Board for a policy you developed?

10. What expectations (work standards, acceptable behaviour, performance output) did you impose on your personnel, and how did you make them known to those concerned? For example, did you model certain kinds of behaviour? How did you monitor their behaviour to determine appropriateness, and how did you evaluate their performance in terms of your expectations?

11. In order to be successful, administrators must be credible in the eyes of their own personnel. How did you establish your credibility with personnel, especially your own team? And how did you maintain that level of credibility over the long term?

12. What choices or courses of action were available to you when the performance of personnel did not meet your expectations? What course-of-action were you inclined to choose, and what did you do to ensure that your own expectations (or established standards) were met in the long term?

13. How did the School Board of Winnipeg School Division No.1 evaluate your performance as the CEO/Superintendent of the Division? What were your strengths and what aspects of your leadership needed improvement? What steps did you take to improve or to maintain your own performance level?

Accountability

14. As Superintendent, what did the term "accountability" mean to you? To whom were you most accountable? And how did the Board hold you to be accountable for your actions or inactions?

15. It is one thing to be accountable; it is another to be responsive. What did you as the CEO/Superintendent understand by the term responsiveness; for example, did you try to improve the responsiveness of the Division to the demands of its clients? Or, did you ever perceive a conflict between your formal accountability to politicians and the responsiveness of the Division to its clients? How did you resolve that conflict?

16. Another concept related to accountability is autonomy. Did you see it as part of your job to protect, or to increase, the

autonomy of the Division? What steps did you take, if any, to protect or to increase the Division's autonomy, and why was this action necessary?

17. To continue with the concept of autonomy, in what areas were you able to exercise "freewill"? What kinds of limitations (legislation, policy statements and lack of resources, for example) restricted your leadership? What strategies or methods did you employ to acquire additional autonomy for your role as Superintendent? And how much freewill does an administrator need, in your opinion, to be effective?

18. In addition, what limitations did you impose on your own leadership (authority and discretion) as the administrative head of this Division? Why was this necessary?

The Continuum of Leadership Roles

19. What was your orientation towards change and innovation? Did you attempt to change, in any way, how certain things were done in the Division, such as the delivery of programs? And, apart from those changes or innovations that emerged out of the political process, what were the other major forces (in the environment) which had to be addressed through change or innovation?

20. Was it ever necessary for you to resist change proposed by the school board; what was proposed, and how did you resist? What was the outcome in this case?

21. It has been said that the some of the changes you suggested over the years were revolutionary in nature. Were any of these changes inconsistent with the established conduct of the Division in terms of transforming the mission, values, personnel, functions or technologies of the Division in any way? What costs are usually associated with these kinds of changes?

22. What kinds of changes could you readily anticipate; what kinds of changes could you not anticipate, and what kinds of potential changes could you defer or ignore entirely? What did the process of implementation actually involve?

23. As the Division evolved and developed from 1949 to 1966, what range of roles were you called on to perform, such as transformer, initiator, or protector in order to respond to new forces or demands in the environment? What role(s) were you called on to perform most often? What kinds of considerations usually determined the type of role you performed, and what role did you prefer? Why?

24. The contributions that you made as the Superintendent of Winnipeg School Division No.1 are numerous. Please describe some

of the changes or innovations which required your leadership that continue to this day - or that you are most proud of?

25. Professional decision-makers are said to "reflect" on their past experiences in order to determine a future course of action. Can you describe a unique or challenging situation in which this so-called "art of reflection" facilitated your own leadership?

26. Leadership is often described as a "process" in which the leader convinces his/her subordinates to pursue a particular endeavour or mutual purpose. In terms of your own leadership, how were you able to motivate and guide the actions of others to achieve a valued objective?

27. Recent studies on leadership suggest that subordinates ought to be regarded as leaders in their own right. Based on your considerable experience as a senior public servant, what are the critical differences between a leader and his/her subordinates?

28. Recent studies on leadership also suggest that context (institutional, political etc.) plays a significant role in shaping and/or defining one's leadership. If you agree that this is so, please explain how the "context" of Winnipeg School Division No.1 may have shaped your own leadership in an important way? What circumstances did you pay attention to as context?

Conserving Mission

29. One of the most important functions pursued by an administrative leader is to achieve the "mission" of the institution that he/she serves. Was the mission of Winnipeg School Division No.1 clearly stated, or did you have to define and interpret mission, based on your understanding of the intentions of politicians embodied in legal mandates? What was the mission?

30. In order to achieve mission, it is first necessary to "conserve mission." Conserving mission has to do with the preservation or strengthening of an organization's ability to perform its central role and function(s). As a result, administrators must be credible or worthy of trust and confidence in the eyes of all relevant stakeholders. In terms of Winnipeg School Division No.1, who were these relevant stakeholders, and in what ways did you attempt to improve the credibility of the Division in their eyes?

31. Did you strive to enhance your credibility? How? Did being perceived as a capable, trustworthy, and honest administrator serve the School Division and facilitate your leadership? How, and how did you come by this reputation?

32. How did being perceived as critical of your own Division

engender confidence in the public that the Division's activities were consistent with the spirit and letter of the law, or that the values and interests of the public were well served by Winnipeg School Division No.1? What did you hope to achieve by being perceived as critical of your own school system?

33. As part of your leadership style, did you rely on the delegation of authority to others to pursue the interests of the Division? To whom did you delegate authority, most often, and on what basis (superior knowledge or competence, for example) did you delegate authority? How did you ensure that these "agents" always acted in the best interests of the Division, its mission, and the common good?

34. Can you recall an occasion when the public's trust was violated by one of your own agents? What happened; how did you, as Superintendent, try to ensure that your agents did not deliberately or inadvertently overstep their bounds or violate established rules? What actions (remedial or punitive) did you take to restore the public's faith and confidence in the Division to act in the common good?

35. Public administrators must also guard against deliberate deception, and the use of delegated authority for personal (or group) benefit. Some strategies that are useful for this purpose include: the responsible interpretation of legal mandates in a consistently meaningful manner, the education of personnel (instilling in followers important organizational goals), and the use of rule making. What did you do to ensure that those who acted on behalf of the division did not abuse their authority?

Conserving Values

35. Who comprised your administrative team in Winnipeg School Division No.1? What skills in particular did these individuals possess which you thought were important in terms of the Division's 3 levels of action: technical, managerial, and institutional?

36. How did you ensure that your administrative team continued to be appropriately composed? For example, did you continuously take stock of, and adjust if need be, your team to ensure that its composition matched the appropriate level of organizational activity?

37. Successful administrators conserve values by building, strengthening or maintaining the commitment of team members to core values, goals and established standards, because each team member possesses the capacity to transmit and protect the institution's core values to others within the organization and,

thus, to preserve the integrity of the institution. Strategies useful for sustaining the commitment of team members include incentives and persuasion, minimizing dissension among team members, and building and maintaining trusting relationships with team members? What strategies did you use; how did you know when to use them? And, were they effective?

38. When you developed policy, were the policies you developed and brought to the Board for approval always sensitive to both political considerations and long-term educational values? Using an example, when were political considerations more important than core educational values; when were educational values more important than political considerations? Was policy development an exercise in compromise in which educational values were sometimes sacrificed in favour of political considerations?

Conserving Support

39. Resources are needed to continue certain programs and activities. Maintaining external support is important, because bureaucracies are dependent on the resources that certain individuals, groups, and organizations of stakeholders exterior to the Division have at their disposal. How important was the preservation and/or procurement of external support in terms of maintaining the activities, programs, and the wholeness or soundness of the Division?

40. Please identify some of the activities, programs or initiatives that required the resources of external supporters. Who were these supporters, and how did you approach them to solicit their support? What resources did they have to offer (money, technology, special services, for example)? And, what could you legitimately offer (services, benefits, and rewards) in exchange for their support?

41. Prestige may be based on several things, such as the quality of an organization's product or service or on the physical quality of schools or even on the type of publicity generated by a school division. How did the public image of Winnipeg School Division No.1 compare to that of other school divisions within the province (from 1953 to 1966); what kinds of qualities proved most important in terms of your Division's prestige? And why was prestige important? What things did you do to enhance the prestige of the Division?

42. To cultivate and maintain a favourable public image, some organizations publish annual reports or articles about their organizations' production and achievements. Such publications must be meaningful and accurate if they are to achieve their purpose. What did you do to enhance the School Division's image, and how did you ensure that publications were accurate and meaningful?

43. In your experience as Superintendent, how important was timing in terms of when an innovation was adopted? What procedure did you use to ensure that the adoption of an innovation did not occur prematurely, especially those innovations that cost the Division a great deal of money? What process did you use to select one innovation for adoption rather than another?

44. What system or process did you develop (or use) to detect emerging trends in the external environment? What system or process did you use to monitor the operation of your School Division in order to determine whether or not it was in need of modernization?

45. In exchange for external support from a particular group, you may have agreed to serve on a particular board or to be a guest-speaker at a major conference. Although you may not have explicitly supported this group's interests or activities, your support (and the Division's support) is implied. Did you have occasion to reject the support of an external supporter because it would jeopardize the favourable public image of your own Division, as well as your own image? What kinds of considerations always determined the type of support you were willing to exchange for the resources of an external supporter?

46. In what ways did you communicate to either potential or long term supporters what was expected of them, and what you would agree to provide in exchange for their support, so as to avoid any misunderstandings about the nature and extent of your relationship with them and/or the Division's relationship with them?

Power Sharing

47. Administrators can build support for and legitimate the use of authority by incorporating different groups into the decision-making structure of their organizations (co-optation). In the case of Winnipeg School Division No.1, who (parents, for example) did you incorporate into the Division's decision-making structure; what was their function, and why was it important or necessary to build or sustain the commitment and loyalty of these groups? What important purpose(s) was served?

48. In contrast to the above, an organization may respond to the demands of specific individuals or well-organized interest groups, to share power, because they are in a position to enforce their demands. Was there ever an occasion when you offered certain individuals or groups the opportunity to share power? Why? Was the integration process successful, and what benefits for the Division and for those involved in this relationship were actually realized?

49. Administrators must ensure that integrated groups receive an equitable share of benefits allocated through the decision-making structure on a regular basis. Otherwise certain groups may withdraw their support, become antagonistic, and seriously restrict the organization's programs and activities. What benefits were you willing to offer them? And what strategy or strategies did you use to maintain control over the decision-making process, in order to ensure that these groups did not succeed in imposing their own values and objectives on the policy-making of the School Division?

50. In reflecting on your leadership as the Superintendent of Winnipeg School Division no.1, would you consider yourself to have been a successful leader? Why? How should one assess his/her effectiveness?

51. Further, how would you characterize your own style of leadership in Winnipeg School Division No.1, in relation to contemporary models of leadership, such as the heroic leader who transforms bad institutions or the guardian who protects the values, functions, and processes of his institution?

Interview Schedule

Elected Political Officials: School Trustees

1. Why in your opinion was Dr. Lorimer appointed Superintendent, as opposed to other potential candidates? What qualities or attributions are you aware of that may have set him apart from these others?

2. What were your expectations of Dr. Lorimer in terms of his training, experience, expertise, and character? What were his special strengths or qualities? What weaknesses did he have, if any; did they prove to be a detriment?

3. As a former School Trustee of Winnipeg School Division No.1, what did you understand to be the essential role of the Division when Dr. Lorimer was Superintendent? And what id you understand to be Dr. Lorimer's primary role as the administrative head of this Division and as CEO of the School Board?

4. Every public bureaucracy possesses a set of special functions, proficiencies, and core values that define the nature of its enterprise. What proficiencies, functions, and values comprised the business of this Division? Did Dr. Lorimer attempt to preserve or to enhance this set of values, proficiencies or functions?

5. Based on your association with Dr. Lorimer, what additional values, if any, did he bring with him to the Division, which he felt were essential to its success and continued survival? And how did he impart them to others?

6. Aside from their delegated authority, administrators are said to possess a kind of informal authority or influence, which they may use to acquire an objective that they could not otherwise achieve? Would you say that Dr. Lorimer was influential? How do you think he acquired this authority, and can you recount an incident or occasion when Dr. Lorimer used influence to achieve a particular objective? Did he ever use influence to achieve an objective over the misgivings of certain Board members?

7. Effective leaders possess certain traits or qualities that may facilitate their leadership, especially in challenging situations. Can you recall an especially challenging situation, confronting the Division, where Dr. Lorimer's leadership made a difference? What traits or qualities allowed him to respond to this situation in an effective manner?

8. Dr. Lorimer was responsible for developing policy to be approved (or not) by the School Board. Please describe the policy-making as you understood it, including your own role in terms of approving policy. What specific concerns or values always guided your decision to approve or not to approve certain policies developed or brought forward to the Board by Dr. Lorimer? Moreover, what considerations or values were always embodied in policy developed by Dr. Lorimer?

9. Can you recall an occasion when Dr. Lorimer developed a policy for the Board's approval, which some of the members were reluctant to give? What did Dr. Lorimer do to "persuade" or to "educate" these members to reconsider their position? In your estimation, how successful was Dr. Lorimer in terms of obtaining approval for the policies he developed? Was "honesty" an important aspect of Dr. Lorimer's working relationship with the Board?

10. Subordinates impose their expectations on their leaders, but the reverse is also true. What kinds of expectations (performance, adherence to established standards of practice, for example) did the School Board impose on Dr. Lorimer? What expectations did Dr. Lorimer impose on the Board members, and how were you made aware of them?

11. In keeping with the notion of expectations, how was Dr. Lorimer's performance as the CEO of Winnipeg School Division No.1 assessed? What did the assessment process consist of: criteria, instrument or other? What were his strengths and weaknesses?

12. In order to be successful/effective, administrators must be

credible (reliable, trustworthy, acceptable) in the eyes of their subordinates and leaders. As a former elected political official of Winnipeg School Division No.1, what did the term "credibility" mean to you in relation to Dr. Lorimer's role as CEO/Superintendent of Winnipeg No.1? Why was Dr. Lorimer considered to be credible (or not), and what did he do to promote the Division's credibility as well as his own in the eyes of elected political officials, the public, and subordinates?

Accountability (autonomy & responsiveness)

13. In general, how would you define the accountability of a school superintendent? To whom was he accountable formally? Did he, in your opinion, face multiple accountabilities, and to whom was he most accountable to, if not to the members of the School Board? And how did the School Board hold Dr. Lorimer to be accountable for his actions or inactions?

14. Associated with accountability is another term namely, "responsiveness." Was Dr. Lorimer sufficiently responsive to the demands of clients or to those of the School Board? What steps did he take to improve the responsiveness of the Division, or to improve his own responsiveness to the School Board? Indeed, would you say that he was a responsible leader? Why?

15. Did you ever perceive a conflict between Dr. Lorimer's accountability to the School Board and his accountability to the School Division's clients? What happened, and how was this situation resolved?

16. What did the term "autonomy" mean to you in relation to Dr. Lorimer's role as Superintendent and as the CEO of the Board? Did he have sufficient autonomy, too much, or not enough? In what areas was he able to exercise his freewill? Did he seek to enhance his autonomy; why do you think he may have felt it necessary to do so? Was it possible for Dr. Lorimer to be subordinate and autonomous at the same time?

17. Aside from the mandated (statutory) kinds of constraints imposed on a superintendent's leadership, what other constraints did Dr. Lorimer encounter, especially those originating with the Board? Did he impose certain limits on his own leadership? What were they, and why did he impose them?

The Continuum of Leadership Roles

18. What was Dr. Lorimer's orientation towards change and innovation? When did he argue for a change or an innovation; when did he resist change or innovation? Can you recall a challenging situation that confronted the Division that required a change in the way that the Division conducted business? Did Dr. Lorimer

implement certain changes himself, or did he delegate authority to others to implement change?

19. From time to time, administrators may deem it necessary to change the way things are done in an organization. Did Dr. Lorimer attempt to change the status quo, in any way, in order to improve the delivery of certain programs or services, for example? What kinds of things did he have the authority to change; what kinds of things could he not change-which required Board approval?

20. Aside from those changes stemming from the political process, what other major forces acted on the Division that had to dealt with through change or innovation? And in your role as a trustee, did you ever have occasion to work closely with Dr. Lorimer to facilitate change or to implement an innovation? What did that association involve?

21. During the course of your association with Dr. Lorimer, was there ever a time when Dr. Lorimer felt obliged to resist certain changes proposed by the School Board or by certain Board members? What was proposed; what form did his resistance take, and how was this situation eventually resolved?

22. Implementing change (a new curriculum, program or service) requires time, the efforts of others, and feedback to ensure that implementation is successful. When others implemented change, what steps did Dr. Lorimer take to ensure that the implementation process was a success? Was his leadership critical to ensure success? Who were these others, and on what basis (expertise, competence, for example) did he delegate authority to implement a particular change?

23. Dr. Lorimer prescribed different remedies for what ails education. Some of his recommendations (Eugenics, for example) were revolutionary in nature; but did they constitute a radical break from the established conduct of the School Division in your opinion or in the opinion of the School Board? Did Dr. Lorimer understand all of the costs associated with some of the changes he proposed?

24. Superintendents are called on to perform different roles ranging from initiator to protector, depending on the type and scope of the change to be implemented. What range of roles was he called on to perform, and, in your opinion, what role did he prefer?

25. Would you agree that Dr. Lorimer's leadership "made a difference;" what contributions in particular come to mind, and why do you believe that his leadership made a difference?

26. Increasingly, "leadership" is thought to be a process in which

the leader convinces his/her subordinates to work together to achieve a mutual objective. What did Dr. Lorimer contribute to this process? And if leadership really does matter, what were the differences between a leader (like Dr. Lorimer) and those he led?

27. Educational leadership studies suggest that context (institutional, political, economical circumstances etc.) plays a significant role in shaping or defining one's leadership. If you agree that this idea has merit, could you explain how the context of Winnipeg School Division No.1 may have shaped or defined Dr. Lorimer's leadership?

Conserving Mission

28. What did you understand to be the "mission" of the Division? Did you personally have a responsibility to conserve the mission, that is, the executive authority (the power of the Division to act in the common good) of the School Division? In what way(s) did you (or members of the School Board) strive to conserve the mission of the School Division? And, did Dr. Lorimer play a role in helping Board members to conserve mission?

29. Was it Dr. Lorimer's responsibility to define as well as interpret the intentions of political leaders embodied in legal mandates in order to conserve mission? For example, did he set goals for the Division based on how he defined and interpreted the intent of political leaders? Similarly, were Dr. Lorimer's actions/decisions always in keeping with the spirit and intent of statutes and executive orders? Or was Dr. Lorimer simply content to read the text of legal mandates and act accordingly?

30. Public bureaucracies possess the authority and right to issue commands and to perform specific acts. Accordingly, administrators have a duty to try and preserve or to strengthen that authority in order to conserve mission. In what ways did Dr. Lorimer attempt to strengthen or preserve the executive authority of the Division? Did he interpret legal mandates in a consistently responsible fashion, or did he attempt to "educate" (instilling the agency's core values in subordinates) certain personnel in order to preserve the Division's executive authority?

31. Another important aspect of an administrator's job is to guard against violations of authority (based on competence or superior knowledge), because such violations can undermine the public's trust in an agency's ability to serve the common good. These violations are of two types: the deliberate deception of those for which the agency is an authority, and the use of this authority for personal or group benefit. How did Dr. Lorimer prevent his

personnel from violating established rules, or from violating the spirit and letter of the law, and what kinds of actions did he take when subordinates inadvertently or deliberately overstepped their bounds? And what steps did he take to prevent such violations in future?

Conserving Values

32. As an elected political official of this Division, did you have a primary duty to protect from harm the main goals and core values of the School Division? What did you understand, or assume to be, your role in this regard? Or, alternatively, was "conserving values" exclusively the domain of Dr. Lorimer?

33. School superintendents may rely on an executive team, comprised of their administrative assistants, to transmit (and protect) the core values and objectives of a school division from harm. Who comprised Dr. Lorimer's executive team in the Division? How did Dr. Lorimer sustain the executive's commitment to the Division's core values and objectives, especially in the long term? As importantly, how did he ensure that the executive team was appropriately composed in terms of requisite skills, attitudes and perceptions, in relation to the Division's functions and processes? Was it ever necessary for Dr. Lorimer to adjust the team's composition to ensure that it continued to be appropriate for the Division's level of action?

34. In order to sustain the commitment of the executive team to the agency's core values, administrators might use several strategies. Strategies useful for this purpose include using incentives and persuasion, minimizing dissension among team members, and building and maintaining trusting relationships with each team member. What strategy or strategies did Dr. Lorimer adopt? Moreover, how would you describe your professional relationship with Dr. Lorimer in relation to these strategies?

35. Dr. Lorimer formulated policy that required the approval of the Board. Were the policies he developed always in the best interest of the Division? For example, were they always sensitive to both political considerations and long-term educational values? Or, did they tend to emphasize educational values for the most part? Can you recall an occasion when Dr. Lorimer submitted a policy for approval that the Board was reluctant to approve, because, in your opinion, it did not conserve or strengthen values.

Conserving Support

36. In order to maintain a certain level of activity, school

divisions rely on the steady flow of essential resources from individuals, groups or stakeholders. Establishing these supply routes is the job of the senior administrator. What key resources were needed to maintain the programs and activities of the Division; who did Dr. Lorimer approach to solicit such resources, and what (services, programs) could Dr. Lorimer offer in return?

37. Why in your opinion, was it necessary and important to enhance the public image or prestige of the Division? What steps did Dr. Lorimer pursue in order to enhance the public image or prestige of Winnipeg School Division No.1, such as the publication of annual reports or articles about the achievements of the Division? And, how did he ensure that the figures he cited were both meaningful and accurate?

38. It has often been said: timing is everything. This is especially true when it is necessary to adopt an innovation? Was Dr. Lorimer solely responsible for the adoption of innovations, intended to update the Division's operation? How was he made aware of the fact that an innovation was needed? Did the adoption of an innovation require the approval of the Board? If so, what concerns or considerations always quided the Board's decision to approve a change or an innovation; if not, what considerations always guided Dr. Lorimer's decision to adopt an innovation?

39. In exchange for the resources of external supporters, an administrator may agree to acknowledge their support in a public way. What set of explicit and/or implicit understandings always governed a relationship of this nature? Was there ever an occasion when the Board questioned Dr. Lorimer's decision to acknowledge support from a stakeholder, because to do so might jeopardize the favourable public image of the Division?

40. Support for an organization can be acquired by incorporating certain groups (parent councils, for example) into the decision-making structure in order to legitimate and reinforce its authority and thus its integrity. This strategy may be used to avert threats to an organization's stability and existence. Was it the intent of the Division to incorporate certain groups? What role did Dr. Lorimer play in this process? What group or groups were incorporated, and why do you think it was important to acquire the commitment of each group(s) to core institutional values and goals? What was offered to these groups in exchange for their support?

41. Certain groups may be incorporated in response to their demands for sharing power (ex. the incorporation of more women into the leadership structure of an agency), because they afford internal security and broader administrative discretion. In return, the administrator should ensure that each receives an equitable share of benefits allocated through the policy-making

structure so as not to antagonize them, because they are well placed to impede the activities of the organization. Did Dr. Lorimer (or the Board) agree to the inclusion of certain pressure groups into the leadership structure of the Division? Who comprised these groups, what service did each group agree to provide, and what benefits were offered to each group in exchange for the services they provided?

42. Administrative control of the decision-making process may be achieved by influencing the criteria on which decisions are based. At the same time, acquiring control of the decision-making process ensures that each group receives an equitable share of benefits. How did Dr. Lorimer (or the Board) exercise control over the decision-making process in order to ensure that the role played by co-opted groups (informal) did not exceed the authority allocated to them? What criteria did he influence, and what benefits were allocated to each group?

43. When you reflect on Dr. Lorimer's leadership career, what is your perception of his effectiveness as the administrative head of this school division? Further based on your association with Dr. Lorimer, how would you characterize his style of leadership, and what, in your opinion, explains his ability to guide and motivate the actions of others?

Interview Schedule

The following interview schedule is intended for Dr. Lorimer's associates in other school divisions and departments of education outside of Manitoba.

1. What was your role and title at the time of your first meeting with Dr. Lorimer? What was the occasion or context (place and circumstances) and purpose of that meeting? What was Dr. Lorimer's role at this meeting, and what was your impression of his approach to leadership at that time in relation to the purpose of the gathering?

2. If the circumstances of your association with Dr. Lorimer had to do with a project (suggested by him) or something of mutual interest, what was it and what was Dr. Lorimer's role in it? How did he involve others in planning and decision-making? How did he foster cooperation and collaboration among those associates whose support he needed; how did he develop trust and respect among those with whom he worked on the project?

3. For this project (or meeting) involving Dr. Lorimer in which you were either a partner or participant (or observer), what values did he espouse? What were the standards to which he held everyone accountable? How did he show others, by his own example, that he was serious about these values and standards? What

structures or systems did he use to plan, organize, or control the project? And, what dramatic or unusual actions, if any, did he take to get people to pay attention to important aspects of the project or to different notions or ideas which he thought were important?

4. I would like to know more about Dr. Lorimer's character and style of leadership. Someone once said: "Leadership is like art; you know it when you see it." Was this the case with Dr. Lorimer? How did he approach leadership; that is, what was his style of leadership, and what do you think explains his ability to motivate, guide and influence the actions of others who, leaders in their own right, were significantly influenced by him?

5. If you were asked to describe his approach to leadership, what leadership qualities, values, and pattern of behaviour come to mind?

6. Did your first impression of Dr. Lorimer's leadership prove to be accurate, or did you find yourself having to amend it in some way? Upon reflection, how would you describe his approach to leadership?

7. Further, when you think about the significant or lasting contributions made by a particular leader, what achievements do you associate with Dr. Lorimer which continue to this day, or that you think he might be most proud of?

8. As you reflect on Dr. Lorimer's leadership, how would you rate his effectiveness as a leader? What evidence would you offer to support this perception? What were his strengths; what were his weaknesses?

9. In closing, what have I not asked you about Dr. Lorimer's leadership that you would like to comment on at this time?

Interview Schedule: Subordinates

The following interview schedule is intended for subordinates in The Winnipeg School Division No.1.

1. What was the mission of the School Division at the time of your association with Dr. Lorimer? Who were the essential clients of the Division?

2. Every public bureaucracy has a set of special proficiencies, functions and core values that distinguishes it from other bureaucracies. What was the primary role of Winnipeg No.1; what specific values, proficiencies, and functions set this Division apart from others; what part did you play in it; that is, what did

your role or job entail, and what was the nature and extent of your association with Dr. Lorimer?

3. With regard to question #2, what additional values, if any, did Dr. Lorimer bring to Winnipeg No.1, and to what purpose? Further, how did he infuse the Divisional personnel with these values (story telling, anecdotes or personal appointments)?

4. To continue with the notion of core values, how did Dr. Lorimer communicate the idea that remaining faithful and loyal to core values was necessary for the success and continuation of Winnipeg No.1's activities, programs, and role?

5. Successful administrators in public bureaucracies possess a certain amount of informal authority that they may use to achieve a valued objective. Can you recall a specific situation when Dr. Lorimer used his influence to achieve an objective that he could not have achieved otherwise? How did he acquire his informal authority (networking, favours, charisma)? Was he able to influence the Board's decision-making? How?

6. There is a considerable body of literature which suggests that certain personality traits, qualities or attributions account for a leader's success, especially when he is confronted by a challenging situation. Can you recall an incident when certain attributions, possessed by Dr. Lorimer, made the difference in how this situation (or issue) turned out? What leadership characteristics made the difference on that occasion?

7. Subordinates impose their expectations on those who are appointed to be their leader in order to determine whether or not he is credible or worthy of their trust. What expectations did you impose on Dr. Lorimer in terms of the role he played in this institution in regards to such things as his collegiality, standards of performance and conduct, or his integrity and regard for others, especially his staff? Using examples, how did he satisfy or exceed your expectations?

8. If subordinates impose certain expectations on their leaders, the converse is also true. To the best of your recollection, what expectations (performance, deportment) did Dr. Lorimer impose on staff members, and by what methods did he make yourself and others aware of those expectations? What action did he take when his staff exceeded his expectations or, alternatively, did not achieve his expectations?

9. In order to be effective, public bureaucracies expect their staff to achieve certain established standards of performance. In your particular situation, what were those standards; how were you made aware of them, and what was Dr. Lorimer's role in terms of holding staff members to those standards? And, what action did he

take when out put fell below those standards?

10. In general, people value the idea of leadership; yet, others suggest that there is actually no significant difference between leaders and followers, and that subordinates ought to be regarded as leaders in their own right. When you reflect on Dr. Lorimer's leadership, what kinds of qualities did he uniquely possess, that in your mind made him a leader, which his staff members did not possess? Or, alternatively, what qualities did he possess that other leaders with whom you worked did not, but which may have accounted for Dr. Lorimer's success?

11. When it came to evaluating your own performance or the overall performance of staff members, what mechanism or technique did Dr. Lorimer rely on, and what steps did he take to enhance or to sustain members' performance? What action did he take with respect to poor or ineffectual teachers?

Accountability

12. In general, how would you define the accountability of a senior public servant? To whom was Dr. Lorimer accountable? Did he face multiple accountabilities, and to whom was he most accountable? In addition, to whom were you accountable?

13. Along with accountability, another value that is often emphasized in public administration literature is responsiveness. What did the term responsiveness mean to Dr. Lorimer? For example, did he attempt to enhance the response time of this institution to the demands of its clients? And, can you recall an occasion when he perceived a conflict between his accountability to politicians and the responsiveness of this institution to its clients? How was this matter resolved?

14. Autonomy is another concept associated with accountability. Was autonomy a concept that Dr. Lorimer was concerned about? For example, did he strive to protect or to increase the autonomy of the School Division? Why was this action necessary, and what steps did he take to acquire more autonomy?

15. To continue with the concept of autonomy, in what areas or in what way(s) was Dr. Lorimer able to exercise his freewill? What kinds of constraints (legislation, lack of resources, for example) affected the exercise of his leadership? In your opinion, how much autonomy does a senior public administrator to perform his or her job effectively?

16. To the best of your recollection, was there ever an occasion when Dr. Lorimer felt compelled to try to overcome certain constraints, such as the opposition of elected political officials, in order to achieve a valued objective? What was that

objective; what constraints were involved, and how did he attempt to overcome them or to circumvent them? Was he successful? As importantly, what constraints did Dr. Lorimer impose on his own leadership? Why did he do this?

The Continuum of Leadership Roles

17. Administrators are called on to perform different roles in response to forces that impact on their institutions, or in response to the priorities of a new goverment. For example, administrators may be called on to implement change or to introduce an innovation at certain points in an institution's history in response to forces or demands acting on their institutions. In general, what was the origin(s) of these forces and demands (the political process, interest groups, technology, diminshed resources, for example)? What kinds of changes or innovations were implemented in response to these forces and demands, and what was Dr. Lorimer's orientation towards change and innovation? Can you say what considerations or values were responsible for this orientation?

18. In order to facilitate change or to implement an innovation, administrators may be required to perform different roles ranging from initiator to protector. How would you characterize the role that he performed most often? Can you recall an occasion that required a very different type of role?

19. Do you recall a specific occasion when Dr. Lorimer felt obliged to resist certain changes or the introduction of a specific innovation? What circumstances necessitated change or innovation in this case, in the first place? What kind of change or innovation was called for, and why did Dr. Lorimer feel obliged to resist (poor timing, too expensive, detrimental to integrity)? What was the outcome of this situation?

20. It has been said that some of the changes that Dr. Lorimer advocated constituted a radical break from the established conduct of this institution. Citing an example(s), what kinds of changes was he called on to make that may have been necessary but were inconsistent with the established conduct of this institution? For example, was he willing, or did he alter or transform the mission, values, personnel, functions or technologies of the institution in any way? What costs are associated with these kinds of changes?

21. What kinds of changes are especially hard for Dr. Lorimer to anticipate? What kinds of changes could he readily anticipate? What kinds of changes cannot be anticipated? And what kinds of changes could he afford to defer or ignore entirely?

22. Administrators of public bureaucracies often find that they have too much to do, or that they do not possess the required expertise for a particular job. As a result, administrators may choose to delegate authority to others who can get the job done. To what extent did Dr. Lorimer rely on others (yourself, for example) to complete a job? Citing an example, to whom did he delegate authority and on what basis (subordinates' expert knowledge or competence, for example) did he justify his decision? And how did he ensure that his agents always acted in the best interests of the institution, its mission, and its clients?

23. I would now like to return to the roles performed by Dr. Lorimer in this institution associated with the need to implement change or innovation or, perhaps, to resist change. Based on your association with Dr. Lorimer, what range of roles was he called on to perform during his career in this institution, such as initiator or protector? What role(s) in particular was he called on to perform most often or, alternatively, what role did he seem perform best? Ultimately, what kinds of considerations (values, for example), determined the role he performed?

24. Some have said that the success of a top civil servant can be determined by the contributions he (or she) made to the public service or to the public, during his leadership career, that might continue to this day. Please enumerate those contributions (changes, innovations or transformations) made by Dr. Lorimer, during his administration in this institution, which continue to this day - or that he was most proud of. What role did he play in their creation? For example, did he provide the initial leadership, impetus, or did he see each one through from start to finish?

25. Professional decision-makers are thought to reflect on their past experiences in order to determine their future course of action, especially when confronted by new circumstances. As they become more proficient at this "art of reflection," it evolves into something like an involuntary reflex. Would you say that Dr. Lorimer possessed this capacity? Can you recall a specific incident in which his "art of reflection" may have facilitated his leadership, or caused him to exceed his institutional self?

26. Increasingly, leadership is said to be a "process" in which the one who is the "leader" convinces his staff to pursue certain objectives or a common purpose. What does the term "process" mean to you in relation to working with Dr. Lorimer? And, in your opinion, what factors (expertise, traits or attributions) explain his ability to motivate, guide, and influence the actions of others, to achieve a mutual purpose?

27. Leadership studies suggest that "context" (historical,

institutional, and political etc.) plays a significant role in shaping or defining one's leadership. Can you provide evidence as to how the context of this institution played an important role in terms of shaping or defining Dr. Lorimer's leadership. For example, did you discern a difference or change in his leadership behaviour in light of changing conditions in society?

Conserving Mission

28. What did Dr. Lorimer understand to be the mission of this Winnipeg No.1; how did he make that determination (define and interpret), and how did he communicate this interpretation or understanding to his staff (storytelling, for example)? What steps did he take to ensure that the work of staff members served to reinforce the mission of this institution, especially its capacity to perform its primary functions and role?

29. It seems reasonable to assume that in order to conserve mission, administrators must be credible or worthy of trust not only in the eyes of their staff but also in the eyes of important stakeholders, such as the public. Who were these relevant stakeholders (teachers, students, parents, school officials, or others), and what steps did Dr. Lorimer take to enhance the credibility of this institution and, perhaps, his own credibility in their eyes?

30. If being trusted helped Dr. Lorimer to conserve mission then, it must have been especially important to guard against violations of trust, especially violations of the public's trust? Can you recall an occasion when an agent of this institution violated the trust of the public? Without naming names, what happened and how did Dr. Lorimer ensure that his agents did not overstep their bounds or violate established rules again? What punitive or remedial actions were available to administrators, in a situation such as this?

31. Can you recall the steps Dr. Lorimer may have taken to ensure that the spirit or letter of the law was not violated by any agent's actions or activities? Some strategies that he might have used include: the responsible interpretation of legal mandates in a consistently meaningful manner, the education of his staff members (instilling in staff members important organizational goals and values), and rule making. What other strategies did he use, and how successful was he in terms of preserving the authority of this institution to carry out its mission?

Conserving Values

32. The phrase "conserving values" refers to the administrator's role in sustaining his administrative team's commitment to the

goals and values of the organization, because these individuals have the power to protect and transmit core agency goals and values. Who comprised Dr. Lorimer's "team?" How did Dr. Lorimer secure and ensure the commitment of his team members to core institutional values? Some strategies used for this purpose include: using incentives and persuasion, minimizing dissension among administrative team members, and building and maintaining trusting relationships with team members.

33. Furthermore, how did Dr. Lorimer make certain that his administrative team was appropriately composed, in terms of their level of commitment, requisite skills and perceptions? For example, did he continuously take stock of (and adjust, if need be) his team to ensure that the team's composition was well suited to organizational processes, functions, and activities?

34. What did Dr. Lorimer contribute (advice, expertise, support) to the process of policy development at the time of your association with him, and were the policies for which he was responsible always sensitive to political considerations, public wants, professional skills, and educational values? Can you recall the steps taken by Dr. Lorimer to ensure that political considerations, for example, were not more important than educational values or public wants in terms of policy development?

Conserving Support

35. When the resources needed to sustain certain activities, programs, and services are not available through regular channels, administrators may opt to build "support" for their organizations. Winnipeg No.1 was influenced by contextual circumstances including individuals, groups and organizations of stakeholders interested in and affected by the activities of the School Division. Regardless, potential supporters possess the resources needed to maintain an organizations activities and programs. How dependent was this institution on the resources of certain supporters? What programs, services, and activities were at risk? Who were the key external supporters of the Division?

39. Specifically, how did Dr. Lorimer solicit the support of key allies in the external environment? And what resources (money, services, technology) were most valuable in terms of sustaining the activities and programs of this institution?

40. Were there any individuals, groups, or organizations of stakeholders who approached Dr. Lorimer in order to solicit this Division's support for their objective? What kinds of resources could he legitimately offer them, such as services, benefits or rewards, and what resources did they have to offer in exchange? Were interest groups as numerous then, as they are now?

41. Prestige is an important factor in determining how much support an institution can attract. Prestige is based either on the quality of the product or service offered by an organization, or on other characteristics, such as the physical quality of schools within a particular school division or the type of publicity generated by the activities of a department of education. How did the public image of this institution compare to that of similar organizations? Specifically, what characteristics of this organization proved most important in terms of creating a favourable impression, and who was capable of making this determination?

42. In order to achieve and maintain a favourable public image, some organizations might take to publishing annual reports or articles about performance output and achievements. However, in order for such publications to be useful, all information must be meaningful and accurate if they are to achieve their purpose. What did Dr. Lorimer do in terms of creating and sustaining organizational prestige, and how did he ensure that pertinent information was consistently accurate and meaningful? What other publications also served to enhance prestige?

43. "Timing is everything." And this is especially true in terms of when an innovation is either introduced or adopted by an organization. What were some of the innovations imposed on the institution (by politicians, for example); what innovations did Dr. Lorimer introduce into this organization, and how did he ensure that the adoption of certain innovations did not occur prematurely. Moreover, how did he (or others) determine what kind of innovation was needed? Did all innovations serve their intended purpose?

44. In order to maintain a favourable image, and to avoid being viewed as slow-to-respond, how did Dr. Lorimer keep abreast of emerging trends (technological advances, for example)? How did he monitor the institution's operations, programs, and activities in order to determine whether or not they needed to be updated in response to major events, such as the educational priorities of a newly elected provincial government? What role did the public play in promoting innovation?

45. Inducements offered by an administrator, to an external supporter may take the form of tacit acts of support. For example, in exchange for support from an external agency, Dr. Lorimer might have agreed to serve on a particular board or he may have agreed to be a guest-speaker at a major convention. Although he may not have explicitly supported an external group's interests or activities, his support (and that of the institution) is implied nonetheless. Can you recount an occasion when Dr. Lorimer decided (or was advised) to reject the support of an external agency,

because his support could jeopardize the favourable reputation of this institution? What kinds of considerations always determined the type of service or benefit that he was willing to exchange for the resources of an external supporter?

46. In what ways did Dr. Lorimer communicate to potential or long term external supporters what was expected from them, and what he (and the institution) would willingly agree to provide in exchange for their support in order to avoid any misconceptions about the nature and extent of their relationship?

Power Sharing

47. Public administrators can build support, avert instability, establish the legitimacy of their institutions, and broaden administrative discretion by incorporating certain groups into the decision-making structure of their organizations. The incorporation of parents in an advisory capacity, for example, legitimates and thus reinforces institutional integrity. Did Dr. Lorimer solicit the support of certain internal groups (parents or teachers, for example)? What specific role were they to play, and how did he sustain the commitment and loyalty of these internal groups to core institutional values and objectives? Ultimately, what important purpose did he hope to achieve?

48. In order to respond to the demands of well-organized individuals or groups, to share power, that are in a position to enforce their demands, administrators may decide to incorporate such groups into the decision-making structure of their organizations. Was Dr. Lorimer inclined to share power with certain pressure groups? What did these groups offer in return? What benefits was Dr. Lorimer willing to offer them in return? And, what strategy did he use to maintain control over their decision-making, such as influencing the criteria on which certain kinds of decisions were made?

49. In terms of his contributions to the development of Winnipeg No.1, how would you rate Dr. Lorimer's performance? In your opinion, did Dr. Lorimer's leadership make a difference? Why do you say that?