

**Realizing Change in a Manitoba High School: A Multi-Lens Perspective and
Integrative Framework Explaining the Linkages among Contexts, Agents, and Strategy**

By

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Abstract

In September 2009, the Seven Oaks School Division (SOSD) in Winnipeg, Manitoba, Canada operating in accordance with an agreement it had signed with Big Picture Learning Inc. of Providence, Rhode Island opened a Met (Metropolitan Regional Career and Technical Center) school and housed it in an existing division high school. The purpose of this thesis is to analyze the factors that supported the development of the design of this Met school. The analysis in this instrumental case study (Stake, 2006) used an adaptation of a multi-lens integrative framework (Rajagopalan & Spreitzer, 1997) to answer the following overarching research question – *To what extent are the features of the SOSD Met school explained by factors in the environment of the collective leadership group that was assigned the task of developing the school, by factors in the secondary school where the Met school was hosted, and by the mindsets, interactions and actions of the four members of the collective leadership group?*

The study utilized elite interviewing methods (Dexter (1970) with nine individuals and an analysis (Neuendorf, 2002) of primary and secondary documents. The theoretical model as developed through the adapted Rajagopalan- Spreitzer Multiple-Lens Integrative Framework proved useful in identifying environmental and organizational factors that shaped cognitions, which lead to the actions of the principal and advisors of the collective leadership group.

The study shows that the collective leadership group chose a design for the SOSD Met school that was rational in that it met the goals and constraints of major agents in the group's environment, and that it reflected the cognitions and actions of the individual members of the group. More generally, the thesis adds to the literature of strategic organizational change.

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Dedication

*To Marita, Selene, Nathalie, and Larissa,
with all my love.*

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Prologue

Well, my first week at the Met has been....different! My advisor has asked me to provide him a thought page on how the first week went. Here goes. First this school is nothing like I have ever experienced. Right from the moment we got together in my advisory, this wasn't school. I knew when I heard about this new school it might be interesting. To get my older brother to act as my guardian to complete my application process was a lot of work. But here I am. Anyway, to the start of school. We spent the morning getting to know each other in the advisory. There are 15 other students in my advisory and the plan is we are to be together for the next four years with the same advisor. All of a sudden, I am expected to know what I want to do with my life! There is a lot of talk about working out my own learning plan and to get thinking about who I would like as a mentor for my learning through interest plan for the year. This is big since I will be spending two days a week with my mentor at a work site. Some kids are pretty excited, others look like a freezie that just fell out of the freezer, and then there's me with a foot in each group. This is really different and scary since I am the one who is responsible for creating my own plan. Fortunately, I have a great advisor who is there to help me every step of the way. He even called my brother's house, where I am now at, to get to know us better. What do I want to do??? It is hard to talk about classes or subjects this week because we did not have any, but we did. In the afternoon, we got into goal setting and talking about what we want to get out of this year. The day finished and my head was just full of ideas.

Day 2: At school today. We spent the morning talking about how to contact our mentors. Nobody in the group was "real" keen. Talking to a stranger over the phone is not cool! But I really don't have much of a choice if I really want to do this. Fortunately, we are all in the same

boat and the plan is for us to develop some phone calling skills, questions, and have a script prepared if we need a backup. To help, our advisor has offered to make the first call for each of us and then we will be on our own. I had some physio on my leg after I tore my hamstring in summer league soccer. The therapist was really helpful and after I started on the strengthening program, I got to know her quite well. I think I would like to be a physio. That will be my first call, even though I already have a list of five other clinics in town as well that deal with sports injuries. Planning for this took the rest of the morning along with lots of practice. I got so into it that a couple of us keep going at it through lunch. The afternoon was different in that we did a writing work shop for the whole time on resume writing. I worked on resume in the evening also.

Day 3: I guess I forgot to mention how we start our day. Our day starts with what is called a “pick-me-up”. It was kinda awkward at first but I am feeling a bit more comfortable with the group meeting every morning. With the provincial election coming up, someone raised the point about how big a waste of time it was and why bother. It didn’t matter to me but some got into the whole topic big time. What strikes me as neat is we can talk about pretty much anything that is troubling us or on our mind. I’m not there yet but time will tell how this goes. One thing for sure though is the feeling that we can speak up without feeling like an odd ball. This came out when we were making up our classroom rules that turned into a discussion about relationships and how they are important in our school and life. That is only one of the big Rs at our school. The other two are relevance and rigor. Not exactly sure what is involved with those but stay tuned. The rest of the day was spent on putting together our learning plan folder and tying up loose ends for the internship. For me, part of that meant, time in the library with the librarian learning how to do an internet search on physiotherapy.

Day 4: We received our Met student agendas today. They are fairly big and we are expected to use them to keep track of what we are doing and organized. After getting familiar with our planners we talked about what books we were reading and for those of us who weren't big readers to start thinking about choosing a book to read. It helped me start thinking about this after we had a presentation from a kid who is an author. I could not believe that he was working on another one. Two of the kids have been talking how they used to feel out of place in school because they were considered different and that this does not feel like school. One of my interests is medieval warfare. In addition to the internship, we are to prepare an exhibition for the first quarter to demonstrate what we have learnt. These exhibitions are to be presented to everybody and by everybody I mean classmates, family, and mentor. This looks like a big deal in that our grades will be based on these. Aside from the expositions, we get reports from our mentors and narratives from our advisor as to how we are doing in the term. Most of our day is with the advisory or part of it unless we have PE. For PE we join the other students in the gym for class. Some others are taking band or choir. I plan on trying out for the soccer team in the spring.

Day 5: Well this morning we had a science workshop. It was neat since we have to work with the other grade 9 advisory and hear from a university professor on global warming. After the presentation, we got to do a lab experiment. After the morning, I spent the afternoon working on my academic plan. The week ended well with our "kick me out" session.

Chapter 1

Education is not preparation for life; education is life itself.

- John Dewey (1970/1938, p. 125)

What is the purpose of education? What kind of people do we want our children to grow up to be? How can we design schools so that students will acquire the skills they'll need to live fulfilled and productive lives?¹

Background to the Study

In response to these questions, Dennis Littky, the co-founder of Big Picture Learning and of an alternative form of secondary education that has become known as the Met² has outlined a philosophy of education that is anchored in the works of Dewey (1970/1938) andSizer (1984, 1992), and that calls for a profound rethinking of public education.

I believe that the philosophy of education that we have put into practice at the Met and in Big Picture Schools is right. Schools should be educating and evaluating one student at a time, using real work and the standards of the real world. Schools should be allowing kids to follow their interests and should be connecting them to adults and the outside world. Schools should be engaging every family in their child's learning and the life of the school. The specifics – how we do it at The Met, and how we encourage others to do

¹ Questions posed on the back jacket cover of *The Big Picture: Education is Everybody's Business* (2004). Alexandria, VA. : ASCD

² Metropolitan Regional Career and Technical Center – the Met.

it – is what we will keep looking at and what we must never be afraid to change. (Littky, 2004, pp. 199-200)

Littky's words are a source of inspiration for the present study on two counts. Firstly, he is committed to the education of students envisioned by the philosophical orientations of Dewey andSizer who have been compelling advocates for placing students at the center of the enterprise. Secondly, Littky outlines a renewed school that connects students, parents, and staff with the world outside the schoolhouse walls that will work for only as long as it works; then there must be change to continue to meet the needs of students. The need to address continuing change as a function of meeting student needs is documented by Fullan's (2007) scholarly work on school improvement. Large bodies of work characterize change processes and methodologies as terminal points for organizational success. Rarely do we find change embedded in the model of improvement. It is the second aspect of this inspiration that draws the focus of this study. Schools typically are viewed as stable entities (Hargreaves, 1995; Fullan, 1993) with change occurring incrementally.

The September 2009 opening of a Met inspired school, by the Seven Oaks School Division in Winnipeg, Manitoba Canada, represented a dramatic change to the dominant model of secondary schooling offered in the province. This dramatic change is of interest from the perspectives of organizational and strategic change. A focus of this study will concern the planning that took place in the Division to make this school a reality.

In this chapter, I first trace the historical development of the Met school movement and its parent organization, Big Picture Learning (BPL). I then outline the philosophical and guiding principles that led to the agreement between BPL and Seven Oaks School Division. This is

followed by a timeline of events that ends with school opening on September 8, 2009 – Canada’s first Met school. The chapter concludes with the research questions along with statements identifying the significance of the study for theory and practice.

The Development of the Met School Network

The first Met school (technically, the Metropolitan Regional Career and Technical Center) opened in Providence, Rhode Island in 1996 and had its first graduating class in 2000. The Met was a creation of two innovative educators aligned with Progressivism – Elliot Washor and Dennis Littky. Before arriving at Brown University’s Annenberg Institute for School Reform in 1994, Washor and Littky had a combined educational experiential base of over 40 years in a variety of educational settings. Harvard’s Kennedy School of Government recognized Washor for his innovative reforms (Levine, 2002). Littky had been a distinguished principal noted for his work at Shoreham Middle School in Long Island, New York that became a national “State of the Art School” and a focus in Lipsitz’s 1984 book, *Successful Schools for Young Adolescents*, (Meier, 2004). After leaving Shoreham, Littky in 1981, became principal of Thayer Junior/Senior High School in New Hampshire and in the time that he was there, “the dropout rate at the school fell from 20 percent to 1 percent while college matriculation skyrocketed from 10 percent to 55 percent” (Meier, 2004, p. ix).

In Littky’s (2004) book, *The Big Picture*, he describes coming to Thayer and finding a school atmosphere that was in his view wrong. Based on feedback received during the summer from parents, kids, and teachers, he concluded that the primary task was to improve the atmosphere of the school. Initially, Littky took steps to improve the physical appearance of the school. The Pegasus painting on the cafeteria wall occurred as “part of our project to clean up the

school and make it a more vibrant place to spend our days” (Littky, 2004, p. 46). This act by Littky is indicative of his approach to working with kids, who needed to be inspired first. The idea for the Pegasus painting came from one of the dropouts whom Littky interviewed before the summer break. Nick, at a loss for outlining his future plan, was offered summer employment through a federally funded summer job program by Littky to paint a mural “in the grossest room in the building” (Kammeraad-Campbell, 1989, p. 124). Nick searched for a picture and decided the mural to be of Pegasus – a mythical winged horse. A mythical creature taking flight resonated with Littky as symbolizing renewal while providing a “hook for a dropout who attended school every day for the first time in his life, because he chose to” (Kammeraad-Campbell, 1989, p. 124). As work on the mural progressed, Nick at one point informed Littky about his intention to return to school that fall. For some reason, after this statement by Nick, eleven other students who had dropped out either called or met Littky to inquire about returning to school (Kammeraad-Campbell, 1989).

Through the summer, Littky met with parents, students, and staff and directed the renovations in the school by volunteers or summer job students. This combined with changing how the school day started along with removing the bell system created a different atmosphere in the school. In addition to these structural changes, the staff developed a shared philosophy through which kindness and respect were incorporated as a central part of their teaching role. In spite of his achievements, the school board fired him for his “unorthodox methods” (Levine, 2002, p. xiii) in March 1986. His reinstatement occurred, after a court ruling, by Judge George Manias of the Cheshire County Superior Court of New Hampshire on June 22, 1986.³ On August

³ AP. (1986). New Hampshire Judge says Principal was Ousted in Error. *The New York Times*. (June 22) retrieved from <http://www.nytimes.com/1986/06/22/us/new-hampshire-judge-says-principal-was-ousted> on 10/12/2011.

6, 1987, the New Hampshire Supreme Court unanimously upheld the June 1986 Superior Court ruling (Kammeraad-Campbell, 1989).

The story of school change, community resistance, and Dennis Littky's role at Thayer recounts the efforts of an innovative high school principal who transformed a school while a suspicious board (with ultraconservative⁴ leanings) wanted him removed.

While at Thayer, Littky and his school were invited by Ted Sizer to be one of the first four schools to form the *Coalition of Essential Schools* (CES) (Littky, 2009). Another principal of this group was Deborah Meier, known for her work in the Central East schools of Harlem and for her role in founding the CES with Sizer, who became a supporter and a friend of Littky (Meier, 2002).

After six years at Thayer, Littky felt it was time to move on. Littky expressed the following thoughts:

By the time I was ready to leave Thayer, it was clear to me that I had taken the school about as far as I could within that particular structure. In other words, I knew that the still-traditional aspects of the school were keeping it from being as strong a learning environment as it could be. For example, I was still working with a math teacher, a science teacher, an English teacher and a social studies teacher. My math teacher was very good, but I found myself trying to push her to connect the students' learning to other things outside of math while she was resisting and saying, "Remember, you hired me as a math teacher." In addition, that's part of the structure thing. As much as I was giving her

⁴ Kammeraad-Campbell while researching her book was directed to the Plymouth Rock Foundation, which supported authors such as Samuel L. Bloomfield whose Christian writings made claims that the National Education Association's aim was to convert America into a socialist society.

complete freedom to do whatever she wanted, she thought of herself as a math teacher and a math teacher only. (Littky, 2004, p. 124)

After leaving Thayer, Littky, who held two doctorates, went to Brown University at Sizer's invitation to work at the Annenberg Institute for School Reform. While working at the Institute,

[Littky] in 1993, was a National Principal of the year finalist, and was honored as the New Hampshire Principal of the Year for his remarkable achievements at Thayer and his dedication to the students he was serving.⁵

Working at the Annenberg Institute for School Reform situated Littky with another school reformer – Elliot Washor, at a time when plans for a new regional high school were being considered.

The proposed school was initially seen as a career and technical school located on the campus of Central High School. A memo dated May 31, 1994 from the Director of Career and Technical Education to the State Board of Regents stated that the mission of the school was to provide skilled workers for Rhode Island Hospital. A career path would be developed as a tech prep model, with graduating students from the Met going to the Community College of Rhode Island and then to the hospital to work as medical technicians. (Washor, 2003, p. 30)

The development of the proposed school was delayed due to the Rhode Island Department of Education's lack of capacity⁶ to move the project forward (Washor, 2003). The

⁵ The whole story is told in Susan Kammeraad-Campbell's 1989 book *Doc*, which was later, adapted into the 1992 NBC-TV movie *A Town Torn Apart*. (Meier, 2002, p. ix).

⁶ Eight years (1994-2002) lapsed between the passage of the bond issue by the voters of Rhode Island for a Career and Technical school and the initiation of construction.

following account by Washor chronicles the major actions that led to the creation of the Met from 1995 - 1996.

. . . In 1995, Dennis Littky and Eliot Washor . . . proposed to the Commissioner of Education in Rhode Island, the Director of Career and Technical Education in Rhode Island, and the educational design consultant, who prepared the original programmatic design, that they take on the development of the programmatic and physical design of the school with the intention of also directing it for a number of years. The Commissioner agreed, because he did not see any way of moving the school from the planning stages to implementation without external support. Littky and Washor felt they could bring revenue from Brown University and the Annenberg Institute to the project. These funds would help Governor Almond commit to releasing bond money for developing the implementation plan. The governor agreed and the State Board of Regents that allowed the newly formed Big Picture Company, a non-profit organization, to do an implementation plan that would include programmatic design and then a feasibility study for the physical design of the Met, then passed the idea. . .

For the next year (1996), the co-directors of The Big Picture Company, reviewed the programmatic design with the Commissioner, the head of the State Board of Regents, The State Board of Regents, and the Governor's education, policy, budget, and administration directors. The Human Resources Investment Council also supported this initiative with an award to develop the centerpiece of the Met's curriculum, the Learning through Internship. Many key business, union, and state policy people resided on this board. When the Met received this grant, the Council and its members gave their approval to this innovative design. (Washor, 2003, p. 30)

Funding for the Met occurred in June of 1996 from the Rhode Island State Legislature to cover the program cost of 55 students (Washor, 2003). With the funding in place, the program operated in the Shepard Building, the downtown campus of the University of Rhode Island until the school opened in January 2003.

The school campus is currently comprised of six small schools with an enrolment of 720 students (roughly 120 students per school) that share a common facility that includes a library, auditorium, gymnasium, health clinic, multimedia studio, cafeteria, and other amenities (Washor & Littky, 2001).

Philosophy of the Met School

The initial philosophy⁷ developed by Washor and Littky in 1995 as part of their implementation plan a year before the opening of the Metropolitan Regional Career and Technical Center, affectionately referred to as “the Met” in Providence, Rhode Island, is now encapsulated by ‘relationships, relevance and rigor’. In the same year (1995) Big Picture Learning (BPL), a not-for-profit organization, was established with the sole mission of “encouraging, inciting, and effecting change in the U.S. educational system” (BPL, 2010). The establishment of the not-for-profit organization would have addressed eligibility criteria from funding agencies within the United States, as Big Picture Learning would distribute monies and oversee the development of Met or Met inspired schools according to their philosophy of “one student at a time”.

⁷ Encapsulated by the “5 As” – Authenticity, Adult Relationships, Active Learning, Academic Rigor, and Assessment and Reflection)

In 2003, Big Picture Learning was the lead convener of the Alternative High School Initiative⁸ (AHSI). By 2008, over 60 Big Picture schools operated in 14 states assisted by two supporting grants from the Bill and Melinda Gates Foundation. In March 2010, President Obama endorsed the approach of the “Met concept” (*Newsweek*, March 01, 2010). Internationally⁹, schools have opened in Australia, Israel, and the Netherlands utilizing the Big Picture Learning design that embodies “educating one student at one time in a community” (Littky, 2004, p. 75).

In the matter of program delivery, five general learning goals as BPL currently define them (Littky, 2004, p. 103), each with one framing question for illustration, provide a framework around which the student and advisor organize the Individual Learning Plan:

1. Empirical reasoning - *How do I prove it?* (science)
2. Quantitative reasoning – *How do I measure, compute, or represent it?*
(mathematics)
3. Social reasoning – *What are other people’s perspectives on this?* (social studies)
4. Communication – *How do I take in and express ideas?* (English – reading and writing)
5. Personal qualities – *What do I bring to this process?* (Down & Hogan, 2010)

The school structure and program delivery are different from any other program offered in Canada. Although one can find in educational magazines terms such as advisory system, authentic assessment or any of the above list of learning goal names, no such system matches the

⁸ AHSI launched in 2003 with support from the Bill and Melinda Gates Foundation. Since its inception, the organization has focused on improving graduation rates through increasing the number of alternative schools while aligning policy and systems issues. At its zenith, it comprised of twelve organizations and operated 291 schools and programs in 171 cities through 35 American states. As of July 1, 2011, it is no longer an active network.

⁹ As of September 2011, there are 131 Met schools clustered in five global jurisdictions (www.bigpicture.org).

organization of curriculum around interests and learning goals as offered in a Met styled school. The uniqueness is derived within two areas of interest: essential components and elements, and organizational design.

The chief essential element that defines the uniqueness of the school is that students learn outside of school – in the world where they and their parents live. The main component of every student's education is the LTI (Learning through Internship/Interest). Based on the concept of personalized education from Big Picture Learning, students are paired with an expert mentor in the student's field of interest where each student is to complete an authentic project that benefits the student and the mentor at the internship site (Big Picture Learning, 2008). Student projects are driven by each individual's interest in combination with the needs of the mentor, and form the main stem to deepening student learning and academic growth.

Big Picture schools utilize time, people, facilities, resources, and space in unique ways. Big Picture Learning ensures that all students have the opportunity to learn in a place where people know each other well and treat each other respectfully. School populations are restricted to a maximum of 170 students to foster genuine relationships with the adults in the building and other students. The ethos of the school is personalization and this is manifest in many ways, which range from the design of the school building itself to the utilization of assessment instruments.

This redesigned secondary education model has allowed some of Providence's most academically at-risk adolescents to succeed. As of the 2007 school year, the Met cluster of schools "serve 720 students in grades 9 through 12, who are primarily low-income Hispanic, African American, white and Asian students" (Scurry and Littky, 2007, p. 17). The Met has

continued to exceed Rhode Island state graduation rates with a graduation rate of 95% (Scurry & Littky, 2007).

Attention now is directed to the ten distinguishers (identified in bold italic) or essential components that characterize a Met school and directly address the strategies of teaching and the structural features of the school.

In a Met school, the role of teacher is supplanted with the role of advisor. Advisors have a group of 15-17 students within a school population of between 150-170 students and remain with the same group of students for their four years of high school. This directly affects the structure of the school in that classes in academic subjects are replaced through *advisories* that are cross-disciplinary and driven by student need and the learning goals personally established by the student with help from the mentor and advisor.

This personalized instruction drives the curriculum of the school on a person-to-person basis based on a student's *individual interests* and his/her passion (Littky 2004). Parents, students, and teachers create meaning through individual interests within a shared culture where competition is eliminated (Littky, 2004, p. 104). Littky (2004) provides numerous examples and student testimonials to support this concept of personalized learning. A selection of these examples is illustrated and discussed in the following section on learning through internship.

Authentic experiences that are meaningful for the students are exemplified by the *learning through internship* experience (Littky, 2004). The principle of authentic experience is recorded in the following excerpt of *The Met Implementation Plan* (Littky, 2004).

Authentic experiences, such as work with a mentor at a job or community service project, motivate profound learning for several reasons. First, the work has real consequences.

Second, the resources for learning are limitless when students are not confined to one building and a predetermined set of materials. Third, a student develops personal relationships with experts in areas of his passion. (p. 122)

Students are to take on the responsibility for finding a mentor in their area of interest. The relationship created develops for 15 hours per week and over the four years of high school. This experience represents Littky's three Rs for the 21st century: relationships, relevance and rigor. The level of rigorous learning is only possible through a culture of relationships and relevance in the BPL philosophy (Littky, 2004). The real work examples of individual student internships range through:

- Writing a monthly newsletter for the Children's Crusade, a Rhode Island organization;
 - A pathology department internship where a student developed a case for his mother to stop smoking;
 - A student whose goal was to become rich, interned with a banker; and
 - Another student interested in nails, got an internship with a beauty care coordinator at CVS drugstores where she learned to use PowerPoint to train staff on product features and Excel to assist store managers monitor overstock items.
- (Littky, 2004, p. 125)

By June 2002, six years after the initial intake of grade 9 students into the first Met school at Providence, Rhode Island, representatives of more than 900 businesses and organizations had mentored 310 students (Littky, 2004, p. 128).

Family involvement is expected from the moment a student is “enrolled” in the Met until graduation. The student and his or her parent or parents who apply for admission to the Met must “write an essay explaining why they want to be here” (Littky, 2004, p. 135). “Once parent and child have completed their application essays, and when the child actually enrolls, parents are considered to be enrolled as well” (p. 137). Involvement covers participating in their child’s Learning Plan Team (student, internship mentor, and the advisor), providing feedback on their child’s exhibition, and even in being a signee on their child’s high school diploma (Levine, 2002). At graduation, each student presents his/her own valedictory speech as each bids farewell to his or her school and classmates. There is an explicit commitment to involve parents in meaningful educational decision making about how the school operates (Littky, 2004, p. 140).

Authentic assessment grounded in the real world practice of authentic learning provides feedback as opposed to grades to student, parent, advisor and mentor. In lieu of grades, narratives focus on the student in a real world way: “assessing the student’s progress as it compares to what he or she will need in order to succeed in college and in life” (Littky, 2004, p. 157). Further, tests give way to exhibitions presented to their peers, advisors, mentors, and parents. Exhibitions as a means of assessment strive to meet seven requirements:

- 1) Parental involvement;
- 2) A team of advisors;
- 3) Inclusion of outside community;
- 4) Promotion of student growth;
- 5) Elimination of cheating;
- 6) Deeper learning; and
- 7) High standards (Littky, 2004, pp. 165-168).

The next five distinguishers play an integral role in the overall defining characteristics of the school and overlap with certain other distinguishers of a Met school. ***School organization*** is determined by the advisory structure along with LTI but also includes the essential elements of communication, meetings and written reflection. The second distinguisher is one student at a time – ***personalization***. Personalization overlaps with strong family engagement with students being responsible to follow their interests as established in their quarterly individual learning plans. As well, students are required to understand and pursue the five learning goals of BPL. Another distinguisher is ***school culture*** where rituals, intergrade meetings, democratic governance, student leadership and diversity adhere to a respectful and caring environment. One aspect of the school culture is the morning meeting called “Pick-Me-Ups”, which is a formal time to start each day as a community within the advisory. Importantly, ***Leadership*** in BPL schools is “shared between a visionary principal and a dedicated, responsible team of advisors” (BP, 2008). Finally, each school is to have a ***school/college partnership*** that exposes students to the variety of post-secondary options available to them after graduation.

The organizing principle of Big Picture Schools is to “educate one student at a time”. This principle is achieved through an organizational design where the principal is responsible for the development of a thorough learning plan [in the case of SOSD Met- the school plan] and the organizational development of the school along with the powers (with respect to decisions about the advisory) afforded through site-based decision-making (SBDM). The student population (selected lottery style to reflect a school district’s demographics) is strategically arranged to reflect the ethnic composition of the division. The students assemble in advisories that are comprised of 15 to a maximum of 17 students with an advisor who meets with them in the morning and afternoon. Further, students remain with their advisor for the entire school program

developing learning plans tailored around the student's own needs, aspirations, and interests. Students are part of advisories and not classrooms as traditional school design dictates. High school occurs in a non-traditional school design of which internships arranged by the students themselves are one component. As part of their graduation requirement, students are required to complete a project that demonstrates their academic strengths and improvement on identified weaknesses in previous exhibitions.

Through the school day, students work individually as well in small group learning environments around authentic topics both within the building and outside of school. Each student's learning plan is to reflect his or her unique needs, interests, and passions. In the Met, students take on the responsibility for their own learning through the identification and development of their interests. Considerable time during regular school hours is committed to working in the community under the tutelage of volunteer mentors who help staff move beyond standardized evaluation procedures. Students are assessed "on their performance, on exhibitions and demonstrations of achievement, on motivation, and on the habits of mind, hand, heart, and behavior[u]r that they display – reflecting the real world evaluations and assessments that all of us face in our everyday lives" (BPL, 2010).

The attributes of a Met school are outlined in *Attachment A: Big Picture School Philosophy and Design* (Appendix A), which typically accompanies any BPL Memorandum of Understanding (MOU), for a school/school division/district pursuing a Met styled school. In order to meet the organizational requirements, the school district is required to meet the agreed upon stipulations and while working to fulfill these, Big Picture reserves two rights: the right to "select, in collaboration with the District, a principal..." (BPL, 2008) and monitoring of the implementation of Big Picture Schools design components and elements. In addition, Big Picture

provides assistance to the district/division in a variety of capacities and supports. One key support is the possibility of a Met mentor who works with the school principal and advisors.

Development of the Seven Oaks School Division Met School

The idea for the introduction to the Met philosophy into Seven Oaks School Division occurred in 2005 after one of its administrators attended a conference where Littky was presenting. The ideas presented reinforced the concepts developed in Littky's (2004) book, *The Big Picture: Education is Everybody's Business*. The initial use in the Division of the concepts and book was to develop discussions around advisories at the middle school level along with student engagement. The opportunity arose in 2008 for the school superintendent to pursue a Met school in the division as he saw that the model addressed where divisional energies had been directed toward: "the notion ... of one kid at a time and finding out what the magic ingredient to be successful with every student" (B. O'Leary, Interview, May 4, 2011). The school board became aware of this innovation and it resonated with its goal of improving graduation rates at the high school level and its ethos of developing innovative programs. The Seven Oaks School Division, under past superintendents and the current superintendent of schools, Brian O'Leary, has established a reputation as a progressive, student focused district with an innovative spirit. Innovations such as the Bright Futures Program¹⁰, high school advisories, numerous innovative academic and vocational programs situate the division's interest in responding to student needs.

Following some initial conversations, Seven Oaks School Division established a Met school with some 40 students with a staff of four within a period of 9 months (Refer to Table 1.1

¹⁰ Bright Futures is a community-based mentorship and outreach program that is run outside of school hours that supports low-income students earning credits toward graduation.

for event chronology). A formal MOU was signed by February 2009 (Appendix R) and the future SOSD Met principal was appointed shortly thereafter. By March of 2009, several administrators and staff came together to hear Elliot Washor, co-director of Big Picture Learning (BPL), describe the Met concept along with the values of Big Picture Learning with the understanding that the division was moving forward to create Manitoba's first Met school. With the selection of the school principal, staff recruitment occurred in the last two weeks of March followed by interviews through the early part of April and ending with the appointment of three teaching staff to the school.

Table 1.1

**Chronology of Events Outlining the Creation of the Seven Oaks School Division Met,
January 2009 – August 2010.**

January 2009	Met presentation to division personnel
February 2009	MOU signed/Appointment of Met Coordinator
March 2009	Open Houses; Student Registration; Job Posting
April 2009	Advisor Candidate interviews
May 2009	Staff appointed and visitation to Met schools in Sacramento
May 2009	Staff commences work on Academic Plan
June 2009	Work on Academic Plan
July 2009	Time off
August 2009	BPL Summer Big Bang Conference/ BPL Mentor trip to Winnipeg
September 2009	<i>School start up - SOSD Met</i> [with 41 students taking courses offered in grades 9-11 and a staff of four housed in Garden City Collegiate]
November 2009	Quarterly reporting session

December 2009	
January 2010	Quarterly reporting session
February 2010	
March 2010	Open Houses; Student registration
April 2010	Quarterly reporting session Student registration
May 2010	
June 2010	Creation of Mission statement/ BPL Mentor Year-end Reporting Session
August 2010	BPL Summer Big Bang Conference

Two of the three teachers appointed to the SOSD Met school in May, 2009 were assigned the task of working during May and June of that year on the preparation for the implementation/opening of the SOSD Met in September. In part to prepare for the development of the implementation phase and to become well versed in the understanding of how a Met school operated the staff of four traveled to visit the Met Sacramento on May 12, 2009 for a weeklong trip of observation and discussion with staff. After their return, two members of the new staff worked on the creation of an academic plan. The purpose of the academic plan was to align curriculum, identify strategies and deal with the logistics of creating an innovative school structure that fulfilled the obligations of becoming a Met school as set down in the requirements of the Memorandum of Understanding (MOU) with Big Picture Learning. The SOSD Met School Academic Plan, completed by June 2009, would serve as a curriculum guide for the staff and assist in meeting provincially mandated General (GLOs) and Specific Learning Outcomes (SLOs) established by Manitoba Education. When school opened in September 2009, forty-one

students enrolled in the Seven Oaks School Division Met (SOSD Met) housed within Garden City Collegiate (GCC) – a preexisting Grade 9-12 high school with an enrolment of some 1300 students. The SOSD Met operated for the next two years (Grades 9-11) within this enrolment as a school-within-a-school and continued in September 2011 with an additional advisor and fifteen Grade 9 students. Together the principal and advisors act as a collective leadership group.

Purpose of the Study

In 2009, the Seven Oaks School Division started a Met styled school for secondary students that it housed in one of its existing large high schools. The purpose of this study is to analyze the factors that account for the version of the Seven Oaks School Division Met school that was implemented. This purpose was achieved by answering two specific research questions that will be elaborated in Chapter 2 following the presentation of a conceptual framework that was utilized in the study.

Significance of the Study

The last three decades have been marked by an emphasis on managing change and the actual participation of school personnel in school improvement. A key consideration of strategic change literature is that organizational success is the result of the proper match between an organization's strategy and its environment along with its organizational structure. This study has helped to further understanding of organizational and environmental changes brought about to initiate and implement changes in strategy for a high school. Using an adapted version of the Rajagopalan-Spreitzer (1997) Multi-Lens Integrative Framework for contributing value in research, this study adds to the domains of theory and practice.

This study responded to the need for increased theoretical understanding of high school change. Findings also enlightened understanding of the role of changes in an organization's strategy with strategic change. The use of qualitative methods in this case study supported the conceptual and theoretical understandings of the Rajagopalan – Spreitzer (1997) Multi-Lens Integrative Model. The inclusion of a collective leadership group is the distinguishing element in the adapted version of the Rajagopalan – Spreitzer Model. This contribution should provide a more holistic conceptualization of the model of strategic change.

Exploration of how the theory of strategic change applies to high schools assists with our understanding of those factors that facilitate or impede organizational change. Moreover, a key point that emerges is that thinking, acting, and learning are activities that are important to strategic change. The results of this study demonstrate how key personnel's cognitions and actions achieve strategic change in an organization where leadership is distributed amongst staff.

Summary and Conclusion

In summary, our understanding of strategic organizational change deepens through the application of a multi-lens framework that addresses the rational, cognitive, and learning perspectives applied to the content and processes involved in the development of the SOSD Met. The SOSD Met adheres to the philosophical underpinnings of the work of Littky and Washor who develop Met styled schools globally through their not-for-profit organization – Big Picture Learning. This study has implications for the theoretical understanding of strategic change along with implications for practice, research, and policy.

The following chapter provides the conceptual and theoretical foundations of the strategy as developed by the process and content research traditions in strategic change, the presentation

of the Rajagopalan-Spreitzer Model (1997), the development of an adapted version of the Rajagopalan-Spreitzer Model (AR-S Model), and the research questions that direct the study.

Chapter 2

Review of the Literature and Conceptual Model of Study

If I have seen further, it is by standing on the shoulders of giants.

- Isaac Newton, 1679 (cited in Rabe, 2007, p. 1)

Introduction

The purpose of this study is to investigate how a school fundamentally changed its strategy of educating young people. In this chapter, I provide a brief overview of the state of research on the content and process traditions in strategic change along with a description of strategic change. Secondly, the presentation of the Rajagopalan – Spreitzer (1997) Multi-Lens Integrated Model occurs. Thirdly, the adapted version of the integrated Multi-Lens Model used as a conceptual framework for this study is advanced. Finally, specific research questions derived from the model as well as a delineation of conceptual and operational definitions are stated as are conceptual and operational definitions for the variables used in the model.

Content and Process Traditions of Strategic Change

Literature on organization change can be categorized into two schools of thought as determined by their underlying research questions and specific methodologies (Rajagopalan and Spreitzer, 1997). The first is identified as the *content school of thought* and is defined by the content of the change or by “*what to change*”, while the *process school of thought* concentrates on the *process* or in “*how to bring change about*”. The next two parts of this section address the content and process traditions of thought.

The Content Tradition

A useful framework to understand “what to change” is derived through Drucker’s (1994) work on the theory of business, which addresses the need to change in times of trouble. It is the organization’s fundamental beliefs of the external environment, and assumptions about what causes what and how success is defined that forms Drucker’s three-part theory of business. Companies or schools for that matter, therefore get into difficulty when “the assumptions on which the organization has been built and is being run no longer fit reality” (1994, p. 95).

Organizational change typically is triggered through an organization’s response to a perceived need, threat, or improvement. While schools are organizations that share many traits with other kinds of organizations, Owens & Valesky (2007) remind us that relatively little is known specifically about school characteristics and the forces that create genuine school change. Truly innovative reforms at the high school level will be at dissonance with contemporary principles and practices of high school education. Burt (2003) views real world change occurring on a continuum of three levels: incremental, epigenetic (where the external form contains the new internal) and paradigmatic change (discontinuous which alters overall orientation). Hopkins (as cited in Gimmon, Benjamin, & Katzenstein, 2009, p. 235) operationalizes change as radical through the combination of three distinct factors: (1) departing significantly from the organization’s former way of doing business; (2) having far-reaching effects; and (3) creating uncertainty and insecurity among organizational members.

Further, changes in the orientation of a school, much like changes in business orientation can be dichotomously classified by magnitude as “Incremental vs. Dramatic, or as Gradual vs. Punctuated, or as Incremental vs. Radical, where radical changes involve re-establishing business

and state pattern” (Gimmon, Benjamin, & Katzenstein, 2009, p. 235). While Drucker did not refer to revolutionary change, it is clear that he was addressing this type of strategic change. With revolutionary change, the content is associated more with “transformational factors”, at the core of the theory of the business, such as external environment, mission, purpose, and strategy (Burke, 2002). With evolutionary change, content is more concerned with the day-to-day operations and encounters, and the focus would therefore be on production processes, organizational structure, and technology.

Examples of the content for organizational change are drawn from Porras and Robertson (1992): vision, technology, physical setting, organizational structure, and on-the-job behaviour. Further examples of content would be purposes, rewards, helpful mechanisms, leadership, tasks, culture, mission and strategy. Evans and Thach (2000) view change as a model describing the philosophy of how change will occur within the organization. It is a perspective or lens on how to view change. The current case example is one of a handful of change efforts with respect to creating a difference in form, quality, and state of the school, therefore representing radical change in the orientation of the school.

In the field of education in the Province of Manitoba, the recent addition of compulsory Physical Education courses at Grades 11 and 12 represents a content change in the delivery of education to secondary students. The change was to address the general health and well-being of high school students (MECY, 2009), and reflects a rational-deductive approach to decision making which followed a sequential plan that began with goals and moved to policies, programs and actions are the deduced to achieve these goals. The fundamental assumption, as described by Bryson (2004), of rational planning models is that “either there will be consensus on goals, policies, programs, and actions necessary to achieve organizational aims or there will be

someone with enough power and authority that consensus does not matter” (p. 18). In this example, the courses were compulsory requirements for high school graduation in the Province of Manitoba.

The structural feature of school/firm size has been studied within the content tradition of organizational change. According to Monk and Plecki (1999) the matter of optimum size of school and school districts has been a topic of debate for decades. The bulk of research to date has examined the nature of returns to organizational scale through one of two categories: (1) reduction of cost in terms of improving service provision and (2) improvement in the quality of educational services available to students. Key areas of study focus on organizational size in terms of developing and understanding of the relationship between size and student achievement. While very little agreement is forthcoming in the research on optimal school size, there are several reviews, which suggest maxima of 300 to 400 students for elementary schools and 400 to 800 students for secondary schools (West Ed, 2001). Sizer (1984) claimed that schools of 400 students could offer a curriculum that compares quite favorably to their larger counterparts. Sizer believed that “less is more, thoroughness counts more than coverage” (p. 223). In general, studies (Bryk, Sebring, Allensworth, Luppescu & Easton, 2010; Nathan & Thao, 2007; Wasley, Fine, Gladden, Holland, King, Mosak, & Powell, 2000) that have focused on social and emotional aspects of success conclude that no school should be larger than 500 students while those looking primarily at test scores say that somewhat larger is still more effective especially for affluent students. Howley and Bickel’s (2000) study analyzing the interaction between poverty and enrollment size offered this rule of thumb: the poorer the school, the smaller its size should be.

What is clear from the research is that smallness alone does not automatically translate into effective schools. In fact, when small schools act like large ones, as in retaining the departmental structure, little improvement is likely (West Ed, 2001). However, smallness offers opportunity. While “large schools tend to be depersonalized and rule governed organizations, small schools are able to be close knit, flexible communities where no one would be a stranger” notes Sergiovani (1996, p. 236).

The research theme that deals with content issues directs its focus on the substance of contemporary organizational change. “Research in this category has typically attempted to define factors that comprise the targets of both successful and unsuccessful change efforts and how these factors relate to organizational effectiveness” (Armenakis & Bedeian, 1999, p. 295). Factors typically studied include strategic orientations, organization structures, and “performance systems which relate to an organization’s relationship to its environment and therefore define its overall purpose, mission, character and direction” (Mintzberg, 2009; Armenakis & Bedeian, 1999). These factors comprise planning documents that act as a blueprint for action. Fullan (2007) expresses the role of planning as “to design strategies that zero in on capacity building with a focus on results, have a bias for action, and refine and strengthen the strategy through close interaction with the field using evidence-based decisions as you go” (p. 107).

The Process Tradition

The second school of thought considered deals with process issues, which attend to those actions undertaken to affect change within an organization. Mintzberg (2009) conceptualizes such change as occurring at the external, firm, and individual levels. In education, this translates at the environmental level to the various federal, provincial and local bodies that engage in

activities that shape the external environment of schools. At the firm or in our case the school level, the impact of these demands, philosophical or legal, require the school to respond. In turn, these responses through the adoption of new curriculum, programming or policies involve actions by individuals that may require a change in behaviour so that desired outcomes can be achieved (Armenakis & Bedeian, 1999). To this end, Fullan (2007) states that “changing the culture of institutions is the real agenda, not implementing single innovations” (p. 124). He concludes that developing strategy is a complex process, with a citation from Mintzberg, Ahstrand and Lampei.

Strategy formation is judgmental designing, intuitive reasoning and emergent learning; it is about transformation as well as perpetuation; it must involve cognition and social interaction, cooperation as well as conflict; it has to include analyzing before and programming after as well as negotiating during; and all of this must be in response to what can be a demanding environment. (Fullan, 2007, p. 125)

Hargreaves and Fink (2006), while not labeling the shift in Ontario education from linear-rational-planning to process, nevertheless, outlined six attributes characteristic of the process tradition of the educational change and school improvement work in the mid-1990s:

- 1) Understanding and elaborating the deeper meaning of change;
- 2) Respecting the place of emotions, values and moral purpose within these deeper meanings;
- 3) Drawing attention to how effective change involves processes of reculturing and capacity building;

- 4) Locating school change within more sophisticated and sometimes critical understandings of the social context of change in terms of postmodern conditions or complex systems;
- 5) Integrating school effectiveness, school improvement and school change literatures and strategies;
- 6) Embedding changes and improvement efforts within strategic institutional partnerships. (Hargreaves & Fink, 2006, p. 267)

Schools change every day. The change that occurs in schools is, for the most part, unplanned and gradual, a process that Mintzberg (2009) terms emergent change. Planned change, especially in a high school is unusual in that schools tend to be stable. Revolutionary change – “a major overhaul of the organization resulting in a modified or entirely new mission, a change in strategy, leadership, and culture” (Burke, 2002, p. xiii) – is rare indeed. Most public and private organizational change is evolutionary.

Methodologies employed are the actual tools and strategies to implement the change. Holman and Devane (1999) describe thirty-seven specific methods grouped into eight families of processes to help plan and structure change in an organization. In an attempt to develop an integrated theory about organization change, Van de Ven and Poole (1995) conducted an extensive literature review of over 200 articles and found twenty different theories, which they grouped into four schools of thought: life cycle, teleological, dialectical, and evolutionary theories. Evans and Tach (2000) conclude that there are numerous methodologies whereas conceptual models around change are more limited.

Organizational leaders need to appreciate the distinction between evolutionary and revolutionary change because each requires a different approach. As Burke (2002) notes:

If the required change is discontinuous (a ‘big leap’), then we need to concentrate on the organization’s interface with its external environment, on the organization’s mission, goals, and strategy, and probably on the organization’s culture as targets for change. If on the other hand, the required change is not revolutionary and more resembles continuous improvement, then our focus may be on the targets in the organization such as the reward system, information technology, workflow processes, or management practices. (Burke, 2002, p. 143)

Strategic change in this view is categorized in terms of magnitude as either evolutionary or revolutionary. Evolutionary change, also known as first order change, is linear, continuous, and targeted at correcting or altering problems or procedures. Revolutionary/transformational change, also called second order change or gamma change¹¹, modifies the fundamental structure, systems, orientation, and strategies of the organization (Burke & Litwin, 1992). As will be developed further on, the planned and revolutionary distinctions represent themes or platforms on which this study is conceptualized.

Integration of the Content and Process Traditions

In viewing the content and process schools of thought, there is an advantage in understanding strategic change by not presuming consensus where none exists, but accommodating it where it does. Because strategic change does not guarantee consensus, it is more suitable for “politicized circumstances” than are purely rational approaches.

An intense attention to stakeholders and their interests, external and internal environments, and strategic issues means that the actions ultimately agreed upon are

¹¹ Gamma change as described by Golombiewski, Billingsley, & Yeager (as cited in Burke 2002) “involves a redefinition or reconceptualization of some domain, a major change in the perspective or frame of reference within which the phenomena are perceived and classified, in what is taken to be relevant in some slice of reality”(326).

more likely to be *politically* wise and that organizational survival and prosperity are therefore more likely to be ensured. Furthermore, because it gathers relevant information, asks probing questions, and focuses on how best to raise the issues, the process can be used to inform political decision making in such a way that virtuous public and nonprofit purposes are better served than they would be if only the rawest forms of political decision making prevailed. (Flyvbjerg as cited in Bryson, 2004, p. 20)

In other words, the process provides the path of integrating substantive rationality and political intelligence – content and process – in wiser ways that, separately, neither could attain (March and Olsen, 1995; Nutt, 2002; Stone 2002).

Rajagopalan and Spreitzer (1997) point out in their research of the content and process traditions, that while the two schools of thought are related, they “have evolved independently with little theoretical or empirical synergy, resulting in theoretical and practical gaps in researchers’ understanding of strategic change” (p. 48). Drawing on their review of 59 studies through the 1980s and 1990s, Rajagopalan and Spreitzer identified three research and theoretical perspectives in the literature. The next section of this review of the literature develops a definition of strategic change and how the gap between the content perspective and the process school narrows through an integrative framework that combines three distinct theoretical lenses: rational perspective, incremental/learning¹² perspective, and the cognitive perspective. The section following the suggested framework deals with Rajagopalan and Spreitzer’s (1997) development of an overarching theoretical framework that integrates process and content approaches to the study of strategic change. The chapter concludes with the presentation of an adapted R-S Model that serves as a framework for the proposed study currently being proposed.

¹² Hereafter referred only as the learning school or tradition.

The amount of organizational change literature in terms of breadth and scope has led to confusion over the use of the term change. The all-encompassing notion, designating the field that I am working within, is change in an organizational entity (Van de Ven & Poole, 1995), where the word change refers to “an empirical observation of difference in form, quality, or state over time in an organizational entity” (p. 512). The organizational entity under investigation is a school within a high school. Building on this definition of change, Rajagopalan and Spreitzer (1996) define strategic change to encompass two things: (1) changes in the content of the firm’s strategy as defined by its scope, resource deployments, competitive advantage, and synergy; and (2) changes in the external environment and organization brought about to initiate and implement changes in the content of the strategy. In their review of the research in strategic change, Rajagopalan and Spreitzer (1997) identify the field as dealing with: Triggers (environmental and internal conditions and changes); Managerial cognitions (thought, sense-making, and learning processes); Managerial actions (measure undertaken to implement change); and Organizational outcomes (the results of the change process).

However, there is less focus on the “objects” of change; in other words, if the content of the strategy changes, this will theoretically lead to changes in structures, processes, or HR policies. To some extent, therefore, studies of strategic change in organizations operate with a “black box” being the object situated between the changing strategy and the organizational outcomes. This gap is bridged by studies of organizational change focusing on changes in the form, quality, or state over time of organizational conditions, e.g. structure, people, and boundaries. Schein’s (2004) study on the Digital Equipment Corporation (DEC) of this type of research through his analysis of three interdependent developmental perspectives – technology, organization, and culture is an example.

Walsh (1995) states “knowledge structures, or schemas, are specific for information domains” (p. 285). The study of knowledge structure content is foundational to the study of managerial cognition. Leithwood and Steinbach (1995) describe a school administrator’s cognitive context as “those factors that administrators actually think about as they frame their problems” (p. 18) inclusive of the external environment. They further describe three key processes that divide expert and non-expert administrative problem solving as problem identification, the nature and use of values, and the processes associated with cognitive flexibility. Leithwood and Steinbach (1995) conclude that “amounts of domain specific knowledge possessed by problem solvers and their beliefs concerning the likely value of contributions made by colleagues are the most visible examples of such underlying characteristics identified” (196). Leithwood and Steinbach (1995), citing Van Heln, claim, “the ultimate explanation for the form and content of human expert’s knowledge is the learning processes that they went through in obtaining it. Thus, the best theory of expert problem solving is a theory of learning” (p. 248). Argyris (1999) cautions and then extends the definition of learning as problem solving more broadly. He argues that if learning is to occur, “managers and employees must also look inward. They, need to reflect critically on their own behaviour, identify the ways they often inadvertently contribute to the organization’s problems, and then change how they act” (Argyris, 1999, p. 127). This is achieved through double loop learning or in how people reflect on their thinking – “that is, the cognitive rules or reasoning they use to design and implement their actions” (Argyris, 1999, p. 128).

The complementary nature of strategic change and organizational change studies becomes obvious as the latter is less preoccupied by the goals and outcomes of change predominant in the former. Hence, a holistic framework for studying change in a high school as

an organizational entity would analyze the triggers, managerial cognitions, managerial actions, and organizational outcomes, as the organizational conditions undergoing change.

The utilization of a multi-lens approach with the focus on change in organizations unfolding as a systemic interaction between the environment and the core elements of the internal change process, i.e. managerial cognitions and actions, and change in the organizational conditions provides the holistic framework called for in the above paragraph.

Strategic change occurs when a difference in the content of the strategy of an organization reconfigures in a different pattern of alignment with its external environment. An organization's alignment with its external environment is defined as the "fundamental pattern of present and planned resource deployments and environmental interactions that indicates how the organization will achieve its objectives" (Hofer & Schendel 1978 as cited in Rajagopalan & Spreitzer, 1997, p. 49). Changes in this alignment encompass (1) changes in the content of the firm's strategy as defined by its scope, resource deployments, competitive advantages, and synergy (Hofer & Schendel 1978 as cited in Rajagopalan & Spreitzer, 1997) and (2) changes in the external environment organization brought about to initiate and implement changes in the content of strategy (Labovitz & Rosansky, 1997).

Furthermore, such changes can occur at the micro, mezzo, and macro levels of the organization (Ginsberg, 1988). However, organizational changes that do not result in changes in the content of a company's strategy or in Drucker's (1994) language, theory of the business, are not included within the domain of strategic change.

For the purposes of this study, I have adopted the following definition of organizational change from Rajagopalan and Spreitzer: "A difference in the form, quality, or state over time in

an organization's alignment with its external environment" (1997, p. 49). This definition draws upon the corpus of three distinct theoretical lens that blend theoretical rational models categorized by the *content* school with the learning and cognitive models categorized by the *process* school of strategic change. "Furthermore, although these three perspectives reflect the underlying theoretical models embedded in empirical strategic change research, they are consistent with well-established theoretical models in the broader strategy literature" (Rajagopalan and Spreitzer, 1997, p. 50) produced by Allison (1971), Chaffe (1985), and Mintzberg (1990). While all three lenses include changes in the content of strategy within their definitions of strategic change, the learning and cognitive lenses broaden their definition of strategic change to include the organizational and environmental changes brought about to initiate and implement changes in the content of strategy.

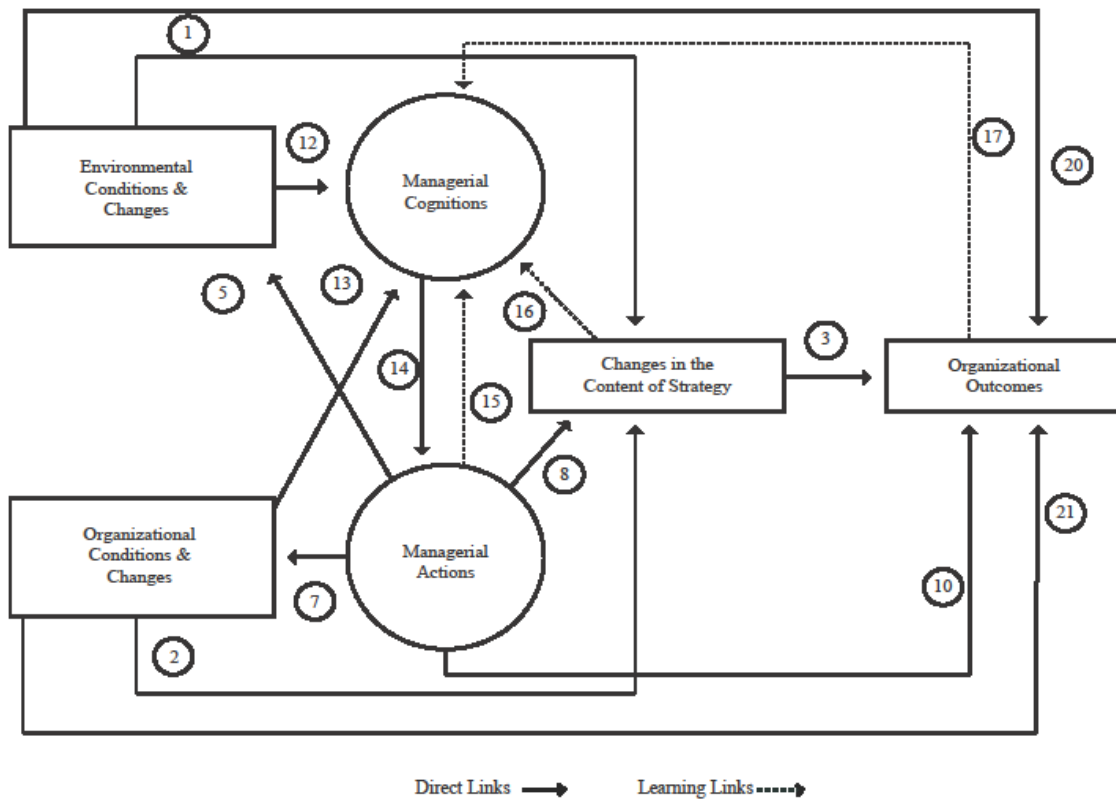
Through the rational lens, strategic change is a sequential, planned search for optimal solutions for well-defined problems based on *a priori* organizational objectives. The learning lens views strategic change as an iterative process whereby managers effect changes through a series of relatively small steps designed to probe the environment and the organization. Rajagopalan and Spreitzer (1997) argue, based on their review, that strengths of the learning lens are complementary to those of the rational lens. The cognitive lens makes explicit the role of managerial cognitions in the strategic change process. Managerial cognitions are defined as knowledge structures, core beliefs, cause maps, and schemas (Walsh, 1995). The cognitive model emphasizes the interpretive processes through which managers enact the environmental and organizational context. This is the only lens, which explicitly focuses on the managerial cognitions as distinct from actions. Taken individually each model informs on an aspect of strategic change but the reality of change cannot be demonstrated through one model (Burke,

2004). This integrated model then allows for a more complete understanding of the factors that support or impede change and was chosen for its conceptual strength in identifying the linkages among contexts, agents, and strategy.

The Multi-Lens Integrated Framework

In this section, I outline Rajagopalan and Spreitzer's (1997) Multi-Lens Integrative Framework (R-S Model) that synthesizes the key theoretical relationships from the three perspectives: rational lens, learning lens, and cognitive lens (see Figure 2.1). Environmental and organizational conditions directly influence the options for changes in the content of the strategy (Links 1 & 2) and shape managerial cognitions about the need for, and resistance to change (Links 12 & 13) as well as the presence of supports and obstacles to that change. These cognitions, in turn, trigger managerial actions aimed at understanding environmental/organizational conditions through information gathering and analysis (Link 14). These actions, in turn, reshape cognitions of the need for and feasibility of change, (Link 15) and attempt to influence the environment (Link 13), the organization (Link 7), and/or the content of the strategy (Link 8). Actions aimed at the environmental/organizational conditions manifest themselves in organizational outcomes such as support for the change, employee morale, and stakeholder satisfaction (Link 10). Change in the content of the strategy results in organizational outcomes (Link 3). Links 16 and 17 reflect how managers learn during the strategic change process.

Figure 2.1
Strategic Change : A Multi-Lens Framework



Adapted from “Towards a Theory of Strategic Change: A Multi-Lens Perspective and Integrative Framework” by N. Rajagopalan, N. & G. Spreitzer, 1997, *Academy of Management Review*. 22: 1, p. 62.

Definition of terms in the R-S Model

The conceptual definitions for each of the research constructs of the R-S Model are:

Strategic Change: The difference in the form, quality, or state of the organization over time as evidenced through changes in the content of the strategy along with accompanying environmental and organizational conditions changing.

Alignment: A fundamental pattern, of present and planned resource deployments, that interacts with environmental conditions that indicate how the organization will achieve its objectives.

Environment: The environment is assumed to be objectively defined and presents as threats or opportunities. More specifically: the availability of new technology; the emergence of new competitors; a decline in product demand; or where volatility creates threats or opportunities for the organization.

Organizational Conditions: Firm size, age, prior performance, prior strategy, top management characteristics, and governance structure.

Content of the Strategy¹³: The mission and goals of the organization, the organization's product market scope, its competitive positioning, or resource deployment.

Managerial Cognitions: Comprised of knowledge structures, core beliefs, causal maps and schemas.

Managerial Actions: Who is involved and in what manner; information gathering (aimed at understanding threat or opportunity), influencing environmental/organizational contexts proactively; managing coalitions, minimizing political pressure; articulating mission and goals; and changing resource allocation.

Outcomes: The financial and non-financial outcomes. Examples of non-financial outcomes are - support for the change, employee morale, and stakeholder satisfaction.

¹³ Rajagopalan & Spreitzer (1997) found changes in strategy were operationalized differently in the studies they examined. The list provided in the definition is considered as possible attributes that may individually serve as a definition or in complex interactions a combination of attributes.

Learning Links: How managers learn during the strategic change process. Learning occurs in a continuous reshaping of cognitions as changes in strategy are implemented, as organizational outcomes begin to emerge, and as managers make sense of their actions.

Direct Links: Assumed to directly influence changes in the content of the strategy, organizational outcomes, managerial actions and cognitions, and environmental and organizational conditions.

Based on the integrative framework presented in Figure 2.1, Rajagopalan and Spreitzer (1997) present two research questions integrating the content and process schools of thought.

Research Question 1: *To what extent are variations in changes in the content of strategy explained by variations in organizational and environmental antecedents and variations in managerial cognitions and managerial actions?*

Research Question 2: *To what extent are variations in organizational outcomes (economic and noneconomic) explained by variations in changes in the content of the strategies, managerial actions, and changes in organizational and environmental conditions that occur during the strategic change process?* (p. 72)

The above research questions situate clearly the content of the strategy as a dependent variable as its form, magnitude and direction will be determined by the forces exerted from the environment and the organization contexts as mediated through the cognitions and subsequent actions of managers.

The Adapted Multi-Lens Integrated Model (AR-S Model)

The selection of the R-S Model developed by Rajagopalan and Spreitzer (1997) is grounded in the theoretical assumptions and linkages that integrate the three perspectives

when studying organizational change. The rational lens addresses the content of the change while the cognitive and learning perspectives deal with the processes involved in change efforts. The combination of the content and the process schools of thought viewed through as multi lens perspective afford a comprehensive understanding of strategic change than solely relying on one perspective.

This approach to understanding school change addressed the conclusion of Sashkin and Egermeier (1992) in their 30 year review of the literature on educational change that single dimension strategies of change do not produce lasting success. In their review, three orientations to educational change were identified: (1) the rational scientific orientation, (2) the political orientation, and (3) the cultural orientation. Taken individually, each conventional strategy was unable to produce lasting change. The authors conclude that integrating the three orientations on change and capturing the synergy between them would hold the most promise for educational change. The AR-S Model achieves this through the integration of the content and the process traditions within a multi-lens model.

With respect to the previous knowledge, theoretical and methodological underpinnings of the R-S Model, I made two adaptations to the R-S Model. Firstly, as the focus of the study addresses changes to the content of the strategy and not to implementation, organizational outcomes are not analyzed. Secondly, managerial cognitions and actions are embedded within a collective leadership construct, which utilizes staff members' cognition and actions and which is termed the collective leadership group (CLG; Denis, Lamonthe & Longley, 2001).

Mintzberg (2009) described *distributed managing* (his italics) as collective managing through the diffusion of some managerial role responsibilities to other non-managers in the

department. Another key feature of Met schools is a flatter organizational structure where decisions are broadly distributed. Decisions are made collectively, individually by advisors, or by the principal based on the needs of the student, advisory, or school. Mintzberg and Waters (as cited in Mintzberg, 2009) labels whoever takes an initiative on behalf of the organization that results in a course of action a strategist, and the initiative is classified as an emergent strategy. The conventional approach to leadership is a person in a position, which situates one leader in charge while the subordinate role is to follow. Raelin (as cited in Mintzberg, 2009) challenges this view by calling for “communities where everyone shares the experience serving as a leader, not serially, but concurrently and collectively” (p. 153).

What Raelin calls *leaderful* practice is *concurrent*, meaning that “more than one leader can operate at the same time”, it is also collective, meaning, “decisions are made by whoever has the relevant responsibility” and it is *collaborative*, meaning, “all members of the community . . . are in control of and may speak for the entire community.”

(Mintzberg, 2009, pp. 153-154)

Jackson (as cited in Gunter, 2005) addresses the vitality of distributed leadership:

The current model for the school system in this country [England] is not marked out by characteristics of learning, innovation, enquiry, and knowledge creation. The talk has been more of structures, job descriptions, targets and performance management. It will involve new ways of thinking about how schools function and not always within a climate that is conducive. Professional learning communities are distributed leadership communities. When community, cooperation and collaborative learning are the prevailing metaphors driving our schools, rather than hierarchy, competition and

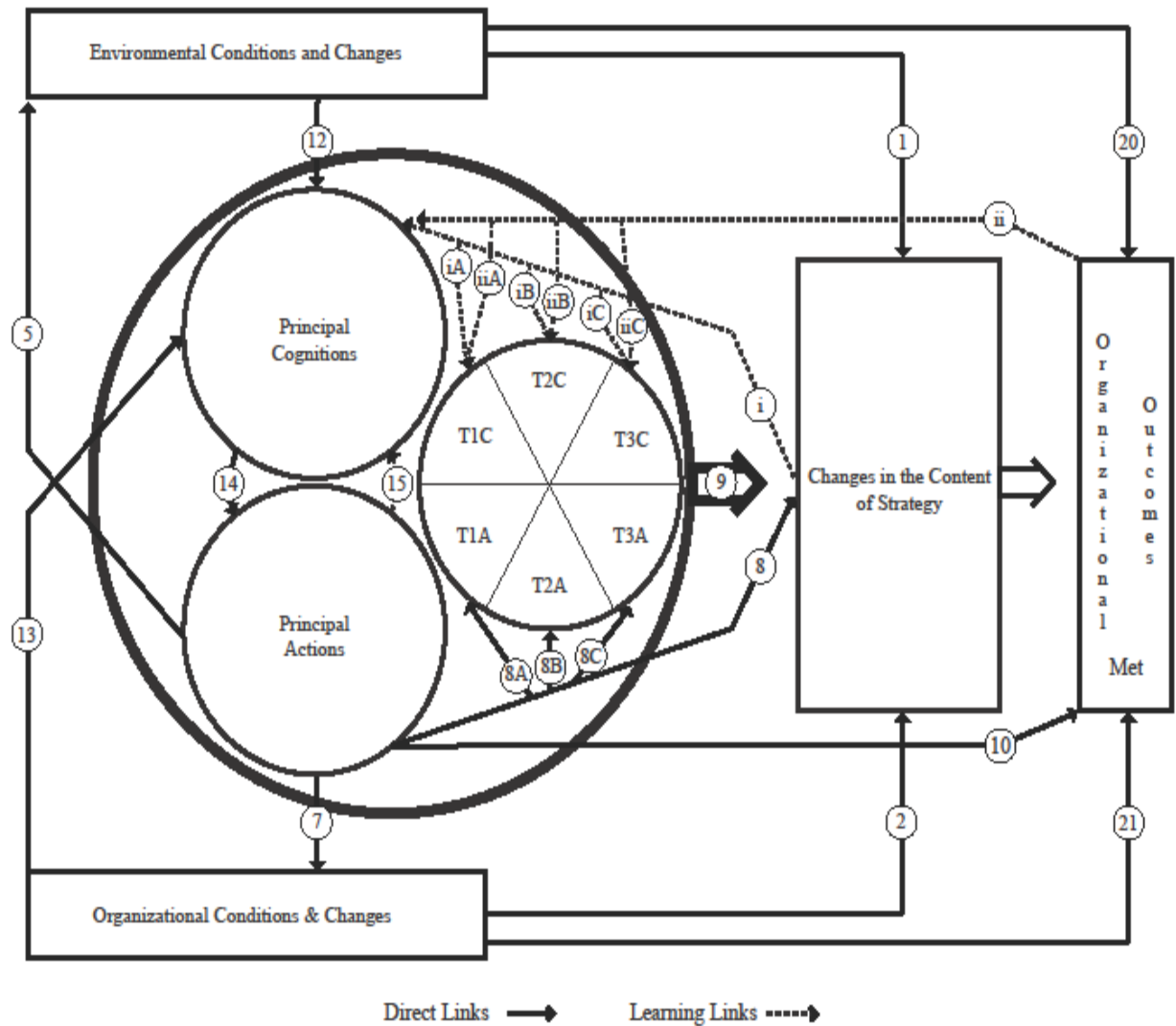
accountability, then it will follow that the issues of voice, participation, ownership, and active democracy will be precursors of new leadership patterns, and this is a hard road to travel. It is one of the journey's against the grain. (pp. 49-50)

In terms of the challenge of building capacity, Sergiovanni (2001) notes:

Local capacity remains underdeveloped, as the policy process itself – the ends of schooling, not just the means – is determined by the excessive use of mandates and incentives as the primary strategy for change and as the primary focus of leadership – a lesson not yet learned by leaders who seek to enhance local autonomy while at the same time mandating uniform standards and assessments. (p. 49)

The focus of the study is on the interplay between environmental conditions and changes, the organizational conditions and changes (that the SOSD Met school is located within), the actions of the group and the principal and the changes in the content of the strategy. The changes in the content of the strategy are affected by how successful the group worked through and developed the five guiding principles of the SOSD Met school that emerged through the study: advisory system; personalized learning; internship; family involvement; and authentic assessment. The study employed an integrated multi-lens approach to address rational, cognitive, and learning approaches represented in the R-S Model and in the adapted R-S Model (AR-S Model) for the purpose of this case study. The AR-S Model is presented in Figure 2.2.

Figure 2.2
Adapted R-S Model



Utilizing the AR-S Model, the study seeks to respond to the following conceptual question:

To what extent is the content of the strategy employed by the SOSD Met school explained by factors in the environment of the collective leadership group, by organizational factors, and by the mindsets, interactions, and actions of the four members of the collective leadership group?

Operational Definitions for the AR-S Model

The operational definitions for each of the research constructs of the AR-S Model are:

Strategic Change: In this case study as developed in Chapters 4 and 5, those features that define the organizational structure of the SOSD Met school or the changes in the content of the strategy.

Alignment: The degree to which there is a match between the content of the strategy and the environmental and organizational contexts.

Environmental Conditions: The environmental conditions are comprised of the goals and constraints posed by Big Picture Learning and Manitoba Education.

Organizational Conditions: Reflect the organizational conditions comprised of the goals and constraints posed by Seven Oaks School Division Garden City Collegiate and SOSD Met school.

Content of the Strategy: The five BPL distinguishers in combination with the Met Academic Plan.

Principal and Collective Leadership Group [Managerial] Cognitions (T1C; T2C; & T3C):

The knowledge structures, core beliefs, causal maps, schemas of the principal and the other members of the collective leadership group.

Principal and Collective Leadership Group [Managerial] Actions (T1A; T2A; & T3A):

Actions by the principal and the collective leadership group with regard to the change in the content of the strategy and in response to organizational and environmental conditions while influencing environmental/organizational contexts proactively (articulating mission and goals; changing resource allocation; and various administrative strategies).

Organizational Outcomes: The effect that the SOSD Met school has on graduation rates, attendance rates, student satisfaction, parent satisfaction, staff commitment, morale of school staff. (Not addressed as it is beyond the scope of the current study).

Learning Links: How the collective leadership group learns during the strategic change process. Learning occurs in a continuous reshaping of cognitions as changes in strategy are implemented and as members of the group make sense of their actions.

Direct Links: Assumed to directly influence changes in the content of the strategy, collective leadership group actions and cognitions and environmental and organizational conditions.

Based on the AR-S Model, I now develop the two-research questions that address the implementation of the SOSD Met school in Seven Oaks School Division.

Research Question 1. *To what extent was this particular version of the content of the strategy a rational choice in light of the goals and constraints posed by the environmental and organizational agents?*

Research Question 2. *Is this particular version of the content of the strategy the result of the interaction of the cognitions and actions of the collective leadership group and their interpretation of the goals and constraints posed by the organization and environment in which the collective leadership group of the SOSD Met school was embedded?*

Summary

This completes the overview of the literature review, in which I identify particular works as content or process traditions following Rajagopalan and Spreitzer's work (1997). These traditions have produced equivocal findings. While single studies typically employ a content or

process orientation, I utilized Rajagopalan and Spreitzer's argument that the two approaches are not mutually exclusive but in fact can be complementary when utilized in a multi-lens integrated framework that draws on the rational, cognitive, and learning perspectives while studying strategic change. The use of the adapted multi-lens integrated model that incorporated the cognitions and actions of the CLG expands on how leadership is viewed.

The following chapter outlines the instrumental case study approach along with the research design employed in carrying out the data collection as defined by the components of the AR-S Model.

CHAPTER 3

Methodology

The aspects of things that are most important for us are hidden because of their simplicity and familiarity.

- Ludwig Wittgenstein (cited in Silverman, 2001, p. 280)

Introduction

This chapter begins with a discussion of the research approach followed by a section outlining the delimitations of the study. Next, the description of the phases of data collection employed in the study is presented. This description is followed by three sub-sections outlining the data collection and analysis strategies: document analysis, elite interviewing and data analysis. After the description of the strategies presented, methodological issues are addressed in the section on limitations. Ethical issues related to this study close the chapter.

Research Approach and Foundation

This research study examines how a school was able to radically change the current model of secondary education in Manitoba to a Met school model of education. To address the how and the why of this school change, a detailed examination of the content and processes of organizational change has been carried out. The examination of the organizational change is conceptualized and theoretically informed through an adapted model (AR-S Model) of the Rajagopalan and Spreitzer (1997) Integrated Multi-Lens Framework through which the two overarching research questions within a case study approach were determined. The unit of analysis was the SOSD Met school and those responsible for operationalizing and implementing a radically changed program of delivery and structure. The selection of the school was

determined by its unique program offered, as defined by the philosophical tenets of a Met program offered in Manitoba.

The case study shows what factors supported or impeded the implementation of the SOSD Met school. Information derived through documentation analysis underwent content analysis (Neuendorf, 2004) while concurrent interviewing was grounded in the protocol informed by Dexter's (1970) work developed in his book *Elite Interviewing*. Elite in this case may be defined as "a group of individuals, who hold, or have held, a privileged position in society" (Richards, 1996, p. 199) or more broadly as an interview for "any interviewee who is given special, non-standardized treatment because they have unique knowledge the researcher is keen to be taught" (Dexter, 1970, p. 5). The findings are presented as an instrumental (Stake, 2005) case study. In Stake's words an instrumental case study:

[Is used] if a particular case is examined mainly to provide insight into an issue or to redraw a generalization. (p. 445)

The method for exploring organizational change is a heuristic qualitative research design that is well suited to study phenomena and participants in their natural setting in order to understand the processes and phenomena through the meanings participants give them in their own terms (Denzin & Lincoln, 1998, pp. 1-3). I elected to employ an instrumental case study approach to this research. I adopted Stake's (2000) notion of case study as researcher's choice of a topic to be studied rather than a research strategy (as suggested by Yin 2003). While organizational change theory is central to the purpose of this study, Stake (2000) explained, "The case . . . plays a supportive role, and facilitates our understanding of something (p. 437). Thus, my focus on the SOSD Met was secondary to my primary interest in organizational change. I

examined the complexities of the creation of the SOSD Met from January 2009 until school opening in September 2009. However, I used the case as an instrument to illuminate how a change in the content of a school's strategy created radical change in the delivery of education to secondary students.

A secondary aim of this qualitative research was to provide an in-depth understanding of people's experiences, perspectives, and histories in context through an elite interview protocol (Dexter 1970), which allowed the interviewees to reflect and express themselves within their own framework and introduce new perspectives.

Datnow and Sutherland's (2002) research on Comprehensive School Reform (CSR) efforts addresses the politics that may arise in research and evaluation of school reform efforts. Thus, according to Datnow and Sutherland, for the relationship between the researcher and the researched to be an effective one, the skills of the researcher need to be developed enough to navigate through the personal and organizational dynamics of the change process. Further they state, one needs to continually question one's role in the research process – is it to be one of data collection and observation or does one intervene when presented with evidence that could “potentially change the course the school is presently on” (2002, p. 185)? The risk of interviewee selection bias was minimized although not completely through the inclusion of two of the three advisors in the collective leadership group. A third issue that Datnow and Sutherland comment on is the need to interpret “from the multiple perspectives of our participants, acknowledging the meaning of events often varied according to one's position” (2002, p. 185). Finally, they draw attention to the issue they termed the non-event problem. In this situation, the challenge in collecting data is hampered due to the reality that schools were not making sufficient efforts at implementing the innovation.

Three considerations played into the decision to employ a qualitative research approach: the research problem, personal experience, and the audience for which this research is intended. The type of research problem posed through how and why questions is well suited to a case study research design in such situations as there are advantages to collecting open-ended qualitative data (Aberbach & Rockman, 2002). While how questions are more readily answered, the why questions can be addressed in many ways through the multi-lens integrated model selected in its holistic approach. Through the collection of data through elite interviewing concurrently with document analysis, a comprehensive investigation that integrated information in the implementation of results was possible.

Creswell (2003) identifies a second factor that influences choice of approach as the personal experience of the researcher. For me, the case study research approach opens the inquiry to a multiple array of views, assumptions, and knowledge, as well as different forms of data collection and analysis because it offers a deeper understanding of the problem through this holistic approach. Finally, my intention is to reach three audiences, for whom this study is reported. Firstly, colleagues in the field of education who, as part of their job, deal with some form of a need for or resistance to organizational change; secondly, to the academics in the field of educational administration who labour in the area of organizational change; and lastly, to policy developers who structure directions in education planning.

Delimitations

I made several research design decisions that aided in the achievement of a reasonable scope of study and in the accomplishment of the goals set at the outset of this research. First, I delimited my conceptualization of change to the change in the content of the strategy as developed by the Rajagopalan- Spreitzer Multi Lens Integrative Model. Second, I focused on a

single case that clearly defined a radical change. The hope is that my instrumental case study design will provide a deeper understanding of the potential of change by changing the content of a school's strategy. Third, I studied the SOSD Met in the context of a specific change, bounded by a fixed period. Fourth, by using a fixed period, the focus on the study is the change in the content of the strategy as manifested through the actions of the collective leadership group in response to environmental and organizational forces. As a result, organizational outcomes can only be assessed once the process of implementation has been initiated. Fifth, I explored specific environmental and organizational forces that came to affect principal and advisor cognitions that resulted in action addressed at changes in the content of the strategy.

Furthermore, I considered factors such as cost, time, and logistics that could interfere with completion of the study. The primary goal was to carry out each interview in a setting that allowed for the convenience of the respondent. Living in Brandon, while only two and one half hours away from the majority of candidates, provided me with convenient access to individuals who possessed the knowledge to provide answers to the research questions. For several individuals, where timing presented a challenge and in the case of the BPL mentor who resided in Vermont, USA, a telephone or Skype© call proved the most effective method of interview.

Data Collection and Analysis

Through an instrumental case study approach, a holistic picture of organizational change is embraced through participants at various organizational levels with respect to the planning, developing, and implementing of this new program. To develop a deep understanding of the change process, administrators and members of the collective leadership group along with key agents in the organization and representing institutions in the environmental context formed the interview pool.

Viewing this research synthetically, there are three phases of fieldwork. The first phase involved an interview with the principal in the summer of 2010, asking for background information about herself and the Met school concept. This provided the context and background information about the organizational change process that I was dealing with. As well, information was sought from printed works and web based information on Big Picture schools, the creators, and the Met school. The second phase developed a level of understanding of the change in strategy, which was a longer phase as it involved arranging for interviews at times that were convenient for the respondents. As this participant group had knowledge of a specialized nature, that of creating a Met school, I used the interview protocol developed by Dexter (1970) on elite interviewing. Studying elite groups or individuals is substantially different from “studying down” (Cormande & Hughes 1996, p. 281).

The third phase involved the checking of the transcripts by the interviewees. The data collection analysis for this explorative study took place in three phases. Concurrently while these in-depth interviews occurred documents were examined. The findings are presented in a case study format (Yin, 2009). In the last phase of the study, the synthesized data, through each of the two research questions generated through the AR-S Model, were used in assessing the model detailing the central components that supported or impeded organizational change. Planning templates available for examination, along with other planning documents were examined to understand the official planning process record.

The selection of the SOSD Met school for this study was both purposive and opportunistic. “Purposive or judgment samplings are based on the researcher’s judgment regarding the characteristics of a representative sample” (Bless & Achola, 1988, p. 75).

Opportunistic sampling, as the term implies, occurs when opportunities presented by close contacts with a school or some staff, or the occurrence of an innovation transpire.

In-depth interviews and a range of documents were collected. The data collection methods and sources aligned with components of the AR-S Model in which these techniques were used is illustrated in Table 3.1 that follows.

Table 3.1

Table Showing the Relationship Between the Data Sources and the Research Questions as Developed from the Concepts of the AR-S Model

Categories For Analysis (Addresses Research Question 1 or 2: RQ1 or RQ2)	Data Source	Concepts in the AR-S Model
Content Analysis of Documentary Sources (RQ1)	Meeting minutes/notes from administration and official board documents; MOU; BPL Proposal; BPL Web based information; Applicable SOSD Policy; Job advertisement; SOSD Met Academic Plan; Gantt charts; newsletters; student handbook; provincial and divisional documents	<i>Environmental and Organizational (Division, Host and SOSD Met) conditions</i>
Interviews (RQ2)	Collective Leadership Group <ul style="list-style-type: none"> • Teacher A • Teacher B 	<i>Cognitions and actions in affecting change in the content of the strategy.</i>

	Met Principal	
(RQ2)	<i>Superintendent</i>	<i>Cognitions and actions in affecting change in the content of the strategy.</i>
(RQ1)	<i>School Board Chair</i>	<i>Role and expectations placed on the Principal and the Collective Leadership Group.</i>
(RQ1)	<i>MB Ed Official</i>	<i>Role and expectations placed on the SOSD Met school.</i>
(RQ1)		
	<i>BPL Mentor</i>	<i>Role and expectations placed on the Principal and the Collective Leadership Group.</i>
(RQ1)		
	<i>Host Principal</i>	<i>Role in Organizational conditions and changes in creation of the Met</i>
(RQ2)		

Data collection occurred over a four-month period, from February 2011 to May 2011 with one further interview in August 2011. This study employed two forms of data collection including six individual face-to-face interviews, five telephone or Skype© interviews, two secondary telephone interviews, follow-up telephone calls and e-mail questions with participants and the collection of relevant documents. The study involved the major actors in the collective leadership group as well as two institutions in the environment and two organizations in the organizational context. All of the interviews were transcribed, verbatim, resulting in 448 pages of double-spaced text. A listing of the interviewees follows the Reference section at the end of the

dissertation. The Education and Nursing Research Ethics Board (ENREB) certificate approving this research is included in Appendix C.

Primary source documents¹⁴ pertaining to the SOSD Met were assembled and include:

- SOSD Met Academic Plan (June, 2009)
- Big Picture Learning Proposal (September , 2010)
- Proposal to Seven Oaks School Division to provide Technical Assistance and Support in the Development of a Big Picture Inspired School (March 25, 2009)
- Position advertisement (March, 2009)
- Student *Super Calendar* 2010-2011
- SOSD Policy GBI: *Professional Learning Community*
- *SOSD Met News* (newsletter)
- *SOSD Met school Report to the Community* (Fall, 2010)
- Gantt charts (planning documents located at SOSD Met/ Contact person A. Warren)
- SOSD Met School Plan¹⁵ (2009-2010)
- SOSD Draft Big Picture Schools Support Plan (January, 6, 2009)

¹⁴ Documents not included as an Appendix can be accessed through either SOSD Met or SOSD Board Office.

¹⁵ The School Plan is created annually by each school, submitted to the school division for review and then forwarded to Manitoba Education.

- SOSD Met school: Frequently Asked Questions (February, 2011)
- Power Point presentation to prospective students/Open House (March 18, 2011).
- SOSD Plan (2009-2010)
- *Parent Information Brochure* (February, 2011)
- New School Development Packet (BPL, August, 25, 2008)
- SOSD Met School Learning Goals.

Other secondary source documents came from the BPL web site, Big Picture School Australia, Big Picture Distinguishers and Big Picture Learning Goals. These primary and secondary source documents are referred to in the study as each pertains to a topic of interest.

Documentary Analysis

The documentary data sources are descriptive of the changes undertaken by the group and represent a written record of the process. For the purposes of analysis, I employed Neuendorf's (2002) protocol for analyzing textual documents with respect to grouping key phrases or messages into categories established by the AR-S Model. The framework selected for this analysis required the classification of the documents into one of three categories as applied in the AR-S Model: environmental conditions and changes, organizational conditions and changes, and the content of the strategy.

Factors were examined through three overlapping categories as determined by the selected documents. In the first category are environmental factors applied to the organization and the staff (site, local, provincial, MOU). These included the philosophical underpinnings of

the Met concept, mission statement of the school, and supports. These factors and forces are thought to be helpful in understanding contextual factors associated with learning and the implications for sustainability of the change effort. In terms of the contextual analysis, consideration of the external environment was informed through looking at forces and trends, key resource controllers, and competitors while the organizational environment was composed of an assessment of resources, previous strategies, present strategy, and performance (Bryson, 2004). In the second category, organizational factors were identified (professional development activities, divisional and host school supports, facility, and resources accessed), and the changes in the strategy of educating high school students or the content of the strategy as the dependent variable, the third.

Evidence of innovative practice was drawn from the SOSD Met Academic Plan, primary and secondary organizational documents, web pages supported by BPL and the SOSD Met school that described the range of activities from which I determined the level of fidelity to a Big Picture Learning School.

According to Neuendorf (2002), much of the content analysis has concentrated on manifest content, the “elements that are physically present and countable” (Gray & Densten, 1998, p. 420). A further consideration is that latent content, “consisting of obscured concept(s) that cannot be measured directly but can be represented or measured by one or more ... indicators (Hair, Anderson, Tatham, & Black, 1998, p. 581) provides researchers with rich information. “These two types of content analysis are analogous to surface and “deep structures” of language and have their roots in Freud’s interpretation of dreams” (Neuendorf, 2002, p. 23). The latent content of the documents was developed through integrating the quantitative content analysis and qualitative message analysis.

Interviewing

Once approval, from school officials in response to the letter of invitation (Appendix D) to participate in the study, was obtained (Appendix E) I proceeded to contact the candidate pool by telephone to determine their interest in participating in the study and obtaining contact information. All but one candidate agreed to receive an information package that contained a letter of introduction (Appendix F); two copies of the informed consent form (Appendix G) and a Response to Request to be Interviewed form (Appendix H). The questions posed to interviewees are contained in Appendices .

I analyzed all the available documentation and interviewed nine respondents who met the following criterion:

- Had been an active participant in initiating, deciding, supporting, or developing the SOSD Met and or the SOSD Met Academic Plan.

The following nine respondents were interviewed: (a) two of the three advisors of the collective leadership group; (b) the SOSD Met principal; (c) the superintendent of schools; (d) the host school principal; (e) a past vice principal of the host school; (f) the past chair of the school board; and (g) the government official assigned to the school; along with (h) the consultant from BPL who was the SOSD Met school mentor.

I used a semi-structured interview approach in this study, relying on general interview guides exhibited in Appendices I through N. Each set of questions were created with the role of the interviewee in mind and formed a basic protocol based on the AR-S Model. In addition to these questions, a time line was provided as an aid when required by respondents (Appendix O). This semi-structured approach afforded me the flexibility to adapt wording, number, and

sequence of questions to changes in the interview situation and context as my research progressed. Introductory remarks and questions helped open the interviews or begin discussion of themes or directions of interest as the interviewees told their stories. Probing questions encouraged elaboration by participants for answers that were not clearly understood by the interviewer. Follow up questions explored different facets of items more deeply that were of interest to the participant or the interviewer. The semi-structured nature of the interviews as well allowed me to leave much of the story to the participants. The story each participant told was personal and reflected a commitment to the change process.

All interviews were digitally recorded and transcribed verbatim. I allowed approximately one hour for each interview and conducted the interview in a setting agreeable to the participant. Actual length of each elite interview ranged from 45 minutes to a maximum of three hours and five minutes. Three of the interviews were conducted in two separate segments due to time constraints.

I used a *snowball*-sampling technique (Broom and Dozier, 1990) to identify other qualified interview candidates that I might have overlooked in the initial phase of the research. By asking candidates of the sample to assist in identifying other potential interview candidates, I was able to expand the initial interview pool from seven to nine. The interview pool reflected the majority of those participants involved in the development of the SOSD Met.

Interviews were central to this instrumental case study approach, in order to uncover participants' knowledge, values, preferences, and beliefs in relation to the change of strategy for conducting education in a secondary high school in Manitoba. In taking the interview as central, I was influenced by Dexter's (1970) approach to discovering how individuals interpret their

social world and how they use those interpretations as a basis for their actions. Within-case analysis entailed exploring theoretical causal relationships with reference to multiple features inherently tied to the case and especially through a close examination of the intervening processes that linked the variables outlined in the hypothetical causal relationship (Mahoney, 2005) as proposed in the AR-S Model. In turn, following this qualitative research method, elite interviewing can be further enhanced through process tracing (Checkel, 2008) that allows identifying of a chain of events.

The process tracing method was first developed over twenty years ago but has been most comprehensively outlined and developed by George and Bennett (2005) who presented a robust defense of qualitative methodology and case study research in particular. The authors argue that causal mechanisms are central to causal explanation, and that within-case analysis is a method best suited to examine the operation of causal mechanisms in detail. Process tracing is in turn, presented as the most appropriate method for uncovering such causal mechanism. As the authors write:

In process tracing, the researcher examines histories, archival documents, interview transcripts, and other sources to see whether the casual process a theory hypothesizes or implies in a case is in fact evident in the sequence and values of the intervening variables in that case. (2005, p. 206)

The process tracing method attempts to identify the intervening causal process – the chain and causal mechanism - - between an independent variable (or variables) and the outcome of the dependent variable. (2005, p. 206)

Four generic stages of process tracing describe the tasks confronting this researcher:

- (1) Collection of data (actions and verbal reports) collected through records and interviews,
- (2) Transcription, integration, and segmentation of data into a time-lined account.
- (3) Coding [according to concepts in AR-S Model], and
- (4) Further analysis and representation of data from Stage 3. (Patrick & James, 2004, p. 262)

Reading of transcripts occurred recurrently, developing themes that described source message attributes (manifest content) that significantly related to factors that enhance or impede the development of the SOSD Met within a constructivist theory methodology (Huberman & Miles, 2002). Transcript analysis of the elite interviews occurred through an iterative process between the theories advanced in the AR-S Model and the collected data¹⁶. This reflexive process (Huberman & Miles, 2002) led me through the process of coding and developing properties and dimensions of categories involved inductive and deductive reasoning that conformed to the components established by the AR-S Multi-Lens Integrative Model.

The AR-S Model provided the theoretical and conceptual links of organizational and environmental contexts to the principal, advisors, the CLG, and their effect on the content of the strategy.

¹⁶ “Checkland and Holwell (1998), for example draw the distinction between data, information and what they call ‘capta’. Capta, according to Checkland and Holwell, are selected or created facts. Data, they suggest, are basic facts from which capta are selected. However, an alternative version might be to simply say that data are also capta, because no meaningful research can be done without selection. What may be perceived as data at some stage will at any rate have been capta at an earlier stage; becoming data simply means that they have achieved an objectified status, where the act of selection and its context may have been forgotten”. (Hernes, 2008, p. 147)

Limitations

The methodological issues in elite interviewing are serious and involve both issues of reliability and validity according to Berry (2002) who poses two questions: “How appropriate is the measuring instrument to the task at hand?” – and – “How consistent are the results of repeated tests with the chosen measuring instrument?” (p. 679). These issues were confronted throughout the interview process. The interview approach followed a constructivist paradigm that utilized criteria of grounded theory. Thus, terms such as credibility, transferability, dependability, and confirmability in place of the usual positivist criteria (validity, reliability, and objectivity) are employed.

An important element in the interviews was providing latitude to participants to tell their account of the events and challenges. The interviewer, as needed, refocused the discussion when the discussion went too astray. Using this open-ended approach with prepared questions as contingency was a way to minimize the risk associated with elite interviewing. Additionally, knowing when to probe and how to formulate follow-up questions “on the fly” (Berry, 2002) required a focused presence. As well, knowing the participant was telling his or her account, story, view, or opinion on the matter under study assisted in suspending researcher judgment and promoting active listening strategies. Finally, the researcher himself threatens the qualitative research through his own bias and /or inadequate sampling of information or events.

To address these challenges, the use of the AR-S Model provided a theoretical and conceptual framework along with triangulation (Denzin, 1989) made possible by document and interview analysis. Data triangulation followed using primary and secondary documentation analysis with different interview sources involved in the creation of the school that were

apparent. The purposive and systematic identification of people involved with the SOSD Met school were contacted, and then interviewed, with the exception of one of the SOSD Met advisors.

A purposive and systematic identification of people involved with the SOSD Met was carried out, and these individuals were then contacted and invited to participate in the study. Three of the members of the collective leadership group including the principal, Adair Warren, and two of the advisors, identified as Teacher A and Teacher B, agreed to participate. The fact that a member of the collective leadership group chose not to participate is a limitation of the study.

In general, credibility and dependability develop through three activities. Firstly, the ability to separate participant statements from interpretative statements made by the researcher is clear through the extensive use of direct quotations and cited views. Additionally all interviews were digitally recorded, transcribed, and reviewed for congruence. As well, member checking occurred as participants received the text of their responses to determine accuracy. Finally, a procedural audit outlining the various stages of axial coding documented with cross-referencing of comments between participants occurred.

The constructivist approach presents a good fit in developing properties and dimensions of the component parts (*a priori*) of the AR-S Model through linking the cognitions of the principal and advisors with their actions directed at changes in the content of the strategy.

In terms of transferability and confirmability, while the Met design is innovative and atypical, its distinguishers do not compromise the ability to generalize to other jurisdictions and contexts. Currently there are 131 Met or Met inspired schools worldwide (BPL, 2011). Using the

AR-S Model in future research would allow for the comparison of other case situations to further develop our understanding of strategic change in organizations.

Within the case study data collected, the principal and the collective leadership group members are reported as part of a single case study. According to Yin (2009), case study research provides insight into causal processes whereas documentary analysis provides an indication of the prevalence of the phenomenon. This final phase of the study involved synthesizing the quantitative and qualitative data to reveal information about organizational change processes and outcomes with the intention of deepening our understanding of the attributes of effective school change.

Ethics of Research

The German sociologist Max Weber (cited in Silverman, 2001) cautioned early in the 20th century that all research is contaminated to some extent by the values of the researcher. According to Silverman (2001), it is only through these values that certain problems get identified and studied in particular ways. Further, as Weber stressed, the conclusions and implications drawn from a study are grounded in the moral and political beliefs of the researcher (Silverman, 2001, p. 270).

Further, documents pertinent to the external environment (forces and trends, key resources, controllers) and internal environment (resources, present strategy, performance) of the school such as agreements and school records were accessed once written consent of the superintendent and principal of the school site was received. In addition, written consent was required from each of the members of the collective leadership group and other key stakeholders prior to the commencement of the study. Participation in the study was voluntary. Information

about the research, which is relevant to participant decision as to whether or not to participate, that is understandable, was provided in the form of the letter of informed consent. Once responses of participants and the raw data assembled for this study were established, all material has been safely and securely stored and will remain under those conditions for a period of three years. At that time, all documents will be destroyed. A member checking process was part of each data collection strategy where participants received my interpretation of their responses for feedback. The integrity based on participant consent and the relationship formed by such a study served as an absolute guideline for my research behaviour during this project.

Summary

This chapter presented an overview of the case study as a method of inquiry, the application of case study conceptualizations to this research, and the specific protocols for data collection. The next two chapters provide the results of the study derived through the content analysis of documents and elite interviewing procedures.

CHAPTER 4

Findings to Research Question 1: A Rational Lens Perspective

Anytime a change takes place in the future, it starts as a vision in someone's mind. The person draws other people into that vision, and when enough people are drawn into that vision, and when enough people are drawn into share that vision, it explodes into activity.

- Nancy Hathaway, Teacher

(cited in Costa & Kallick, 1995, p. 107)

Introduction

Chapter 4 presents the findings relating to the first research question and Chapter 5 presents the findings to the second research question. This chapter begins with an overview of the research process. Next is an explanation of the major variable in the study as advanced through the AR-S Model. The final section of the chapter concludes with a response to the first research question as developed through the AR-S Model.

Research Process

As noted in the preceding chapter by Yin (2009), case study investigators need to employ the essential tactic of “multiple sources of evidence, with data needing to converge in a triangulating fashion” (p. 2). The single case (holistic) design employed as the instrumental study focus represents a unique example of organizational change through a multi-lens framework with the sources of evidence being documentation and interviews. This approach is adopted to “explain” a phenomenon according to theoretical linkages shown in the AR-S Model, or the “how” or “why” an event occurred. The events that are under study, as chronicled in Table 1.1 on p. 20 of Chapter 1, are viewed as decision points in Table 4.1.

Table 4.1

SOSD Met School Decision Points: 2008- September 01, 2009

2008	Introduction of Met concept to school board at retreat by Superintendent
2009	
January	Meeting with Deputy Minister of Education by Superintendent
	Send selected group of division employees to the Met in Providence, Rhode Island
February	Memorandum of Understanding between BPL and SOSD signed by Superintendent of SOSD and the Co-directors of BPL.
	Appointment of Met Coordinator by Superintendent on behalf of the Division
March	Strategic approach to student recruitment by Met Coordinator
	Job postings for three advisor positions in the SOSD Met
April	Decision to interview all applicants by Principal
	Three decisions – three positions filled by Superintendent and Principal
	Decision by Superintendent to assign two staff members to work full time in May and June on the development of an academic plan
	Decision to send SOSD Met staff to Met Sacramento by Superintendent

May	Decision by staff to visit Met Sacramento
	Decision to create an Academic Plan for core courses by CLG
	Decision to offer PE/HE compulsory course through GCC staff
August	Decision by staff to go to Big Bang Conference
	Decision to have workshop with BPL Mentor (condition of MOU)
	Decisions about first day, first week, first month, and first quarter by CLG
September	School opens

In using the decision point chronology, patterns identified as explanations are presented through narrative form. This explanation-building process is similar to a “process of refining a set of ideas” (Yin, 2009, p. 143) and is naturally iterative in nature. As this research study, evolved, constant reference to each of the research questions along with the components of the AR-S Model occurred as I followed the case study protocol, which yielded data that aligned in a chain of evidence. To achieve this end, I have chosen to present the findings that address the two research questions using a first person narrative and employ the use of story to portray the story behind Canada’s first Met school.

Through the research that I undertook, several assumptions about the nature of school change and thus about the attributes of an effective approach to its management became evident. First and fundamentally, any purpose served by change should address the student population. Secondly, planned change is comprehensible and manageable. At a third and subtler level, our tacit understanding of the dynamics of organizational change through a specified integrated theoretical model, which draws from the synergy of rational, cognitive, and learning,

perspectives, deepens. Fourthly, framing change as depicted by alteration of the content of the organizational strategy provides a clear measure of the degree of change. Finally, the commitment, passion, and involvement of staff within a given environment of contextual factors can create and maintain the integrity of a changed system.

This chapter reports the data collected through interview and document analysis. The analysis of the reported findings through the components of the AR-S Model in response to the research questions posed in Chapter 2 using the content of the strategy as the dependent variable. In this research study, Rajagopalan and Spreitzer's (1997) definition of strategy was adopted as this definition incorporated the content and process schools of thought (Drucker, 2008). In addition, the definition takes into consideration Mintzberg's (2009) definition of strategy as a pattern of resource deployments, ties in with the resource based view of the firm/school, and predictably and explicitly ties strategy to firm/school performance. The emphasis in this study was with the school level strategies as the focus is on examining the links between the school's strategies or the content of the strategy with its external and organizational contexts and their relationship with organizational change.

The product or dependent variable of the strategy process is the content of the strategy. The strategy process typically involves content – *the what*. The outcome of the process to develop the SOSD Met is the content of the strategy. In this study, the content of the strategy is comprised of two components. Firstly, the five distinguishers taken together, determine the uniqueness of the SOSD Met in the Province of Manitoba. Secondly, the Academic Plan developed in response to concern about credit acquisition, presents the curriculum framework employed to deliver instruction via the five distinguishers. Further, the Academic Plan addresses

the expectations and requirements of BPL and Manitoba Education. Content strategies are intentionally planned outcomes that reflect the choices of individuals.

With the understanding of the change process being dependent on the content of the strategy, the two research questions as stated from Chapter 2 are as follows:

Research Question 1. *To what extent is this particular version of the content of the strategy a rational choice in light of the goals and constraints posed by the environmental and organizational factors?*

Research Question 2. *Is this particular version of the content of the strategy the result of the interaction of the cognitions and actions of the Collective Leadership Group and their interpretation of the goals and constraints posed by the organization and environment?*

The data collection occurred over a four-month time span, from February 2011 to May 2011, with one interview in August. All interviews were transcribed, resulting in 448 pages of double-spaced text, and analyzed. Document collection totaled twenty-three different pieces of primary and secondary print materials for content analysis with a copy of each in the possession of the researcher.

Content of the Strategy

In this research study, strategic change, as advanced by Rajagopalan and Spreitzer (1997) manifests itself in a school when changes occur in the content of the strategy to address environment and organizational conditions or changes. The changes made to the content of the strategy were to address the divisional high school graduate rate, which at approximately 80 percent (B. O'Leary, Interview, May 4, 2011) was perceived to be low despite the fact this was reflective of the broader provincial picture (*Manitoba Child Health Atlas*, 2004).

The emphasis in this study was limited to an examination of the links between the school's strategies or the content of the strategy with its external and organizational contexts and its relationship with organizational change. What emerged during the construction of the AR-S Model were the roles advisors played that complemented those of the principal in developing the SOSD Met school through the development of the SOSD Met Academic plan and by their focus on Met school distinguishers. The complementary roles focused on the achievement of a Met styled school through the deliberate actions of the group. These actions of the staff were characteristic of management and leadership behaviours. The extent that this group of advisors and the principal, worked collectively to achieve the goal of creating a Met inspired school and through the expectations set out, under the category - leadership, by BPL, operated as what can be termed a collective leadership group. This is due to the distributed leadership structure and the interdependence of job roles in task completion - the creation of an academic plan in response to environmental and organizational conditions.

The product or dependent variable of the strategy process therefore is the content of the strategy. The strategy involved a change in content – *the what*. As well, the strategy involved a process- *the how to bring change about*. The outcome of developing the SOSD Met reflected a process to engage in changes to the content of the strategy. In this study, the content of the strategy was comprised of two components. The first concerned the distinguishers that emerged through the work of the Collective Leadership Group that transformed the structure, routines and processes of the high school. Secondly, an Academic Plan was developed in response to concerns over credit acquisition that contained the following three distinguishers – *Learning through Internship/Interest, Exhibition* within a plan that was *Personalized*. The purpose of the Academic Plan was “to demonstrate the plans that are in place to ensure the required curricular

outcomes are met while keeping in line with the Met school Philosophy” (Warren et al., 2009, p. 1).

The elements that made up the content of the strategy were the choices of the collective leadership group. These choices generally followed four sequential components – the establishment of goals and objectives, exploration of options, weighing consequences, and making a choice (Allison, 2010). Planning while not linear adhered to a bounded rationality (Newell & Simon as cited in Evers & Lakomski, 1996) as presented through a rational lens perspective and is addressed by Research Question 1. This view is expanded with the inclusion of the process elements – *the how* of strategic change – cognition and learning and addressed by Research Question 2.

The changes in the content of the strategy were undertaken by the CLG to address the environmental expectations of BPL and Manitoba Education and the organizational context of being a S-W-S. Through the distinguishers that emerged and the development of the Academic Plan, the expectations as set down by BPL were fulfilled. What emerged through the study was the predominance of five distinguishers that informed the work of the CLG prior to school opening. The school, by developing these distinguishers created a template on which to build the other five distinguishers that collectively sets the school apart from any other high school. An omission in any of the five areas would have undermined the innovation to the point that the school would not be a Met school. In total, ten distinguishers of a Met school are integral to the concept as outlined in Chapter 1. The five distinguishers that emerged are as follows:

- *Advisory structure,*
- *Personalization,*

- *Authentic Assessment,*
- *Learning through Interests and*
- *Family Involvement.*

The remaining five distinguishers would take effect after implementation and do not receive a full analysis in the study as part of the content of the strategy. A brief description accompanies each distinguisher:

- *College partnership* is developed during the operation of the school and will be directly applicable with the first graduating class.
- *Professional Development* refers to the opportunities provided by Big Bang, web access, and professional development set by the collective leadership group.
- *School organization* is directly a function of the following elements: student numbers/advisories/LTI/weekly meetings/written reflection amongst staff, and so can be conceived as a consequence of them.
- *School culture*, described by essential elements but is integrated through the content of the strategy through how staff interacts with students and school routines set through the advisory structure (e.g., each day starts with morning “pick-me-ups”, democratic governance – these would be in the implementation phase or the first year of operation).
- *Leadership* while not discussed specifically in the content of the strategy and not unique to the Met, is part of the CLG distributed leadership construct, which is included in the AR-S Model.

It is acknowledged that these five distinguishers would emerge fully in the implementation phase; elements of each would overlap with the other distinguishers prior to

school start up. Leadership presents as a good example in that the advisors would be exhibiting behaviours that reflected management and leadership actions throughout the developmental stages of the innovation.

Through an examination of five of the ten distinguishers, the structure of the school and the methods of instruction were dramatically changed. BP schools are unique through their application of language and practice. The commonalities shared by all BP schools are called ‘distinguishers’ or principles. The distinguishers coalesce into a comprehensive whole. “They are interrelated and inform one another; consequently, no distinguisher is more important than another and none work in isolation” (Down & Hogan, 2010, p. 27). In the end it is the combination of the distinguishers, the degree to which Met styled schools employ them and the “intense conversations of reflection and action that results in . . . the design” (Down & Hogan, 2010, p. 27).

While these distinguishers are not unique in themselves with many high schools, it is the extent to which the principal and advisors enacted the design, and that the whole set enacted form a coherent whole. These distinguishers articulated as part of the MOU, by BPL were an expectation of SOSD in order to create a Met styled school, as a replica of the Met would involve two significant characteristics unacceptable to Manitoba Education. The characteristics were the reliance on exhibitions with anecdotal assessments and the adherence to the five learning goals that shape the curriculum that individual students are to address. A description of the distinguisher for authentic assessment follows:

The criteria of assessment are individualized to the student and the real world standards of a project (as gauged by the mentor). Students are assessed against the learning goals, a

range of non-cognitive variables and other outcomes as prescribed by the tasks, and the work.

The learning plan determines the individual standards to which the student is held accountable. This is informed by knowledge of the student's strengths and weaknesses, the specific goals attempted and the expert opinions from the learning team (mentor, advisory teacher(s), student and parent) about what the quality of work means for that student in that project and their work generally.

Students engaged in this process at Big Picture Schools are not only assessed by tests and may not be given grades (depending on local context). The assessments at a Big Picture School include public exhibitions (one per quarter or trimester) that track growth, progress, and quality work in the learning plan and academic depth in the Learning Goals, weekly check-in meetings with advisors, weekly journals, yearly presentation portfolios, narrative assessments and transcripts. Gateways for students' progress are between 10th and 11th grade and again at graduation. (Down & Hogan, 2010, p. 36)

The response to the academic concern over rigor was contained in the Met School Academic Plan (Warren, et al., 2009) developed between May and June of 2009. In other Met schools in the United States, Australia, The Netherlands and Israel, quarterly presentations/exhibitions, used to demonstrate student progress through the academic year, were followed with anecdotal assessments (Big Picture, 2011). These exhibitions would still frame the main assessment strategy but with attention to Manitoba standards/outcomes. The document developed by the SOSD Met staff demonstrated how general and specific learning outcomes (GLOs and SLOs) forming Manitoba curriculum standards aligned with the five broad BPL learning goals and how student progress would be tracked and assessed (Warren et al., 2009).

Addressing Manitoba Education expectations was the second component in the development of the Academic Plan. While the Academic Plan was never submitted for approval, it did provide Manitoba Education “with an overview of SOSD Met from a Manitoba curriculum and assessment perspective” (A. Warren, Personal Communication, July 27, 2011). Additionally the Academic Plan formed the basis for planning in the collective leadership group’s first year. The purpose of the Academic Plan was twofold: to demonstrate that plans were in place to meet Manitoba Education curricular outcomes while adhering to the Met philosophy and for the staff to track and assess the outcomes in the integrated day-to-day life of a SOSD Met school student. The Academic Plan consisted of the following five sections: (1) Manitoba Met School Learning Model, (2) Learning Plans, (3) Manitoba core curricula, (4) exhibitions and assessment, and (5) the SOSD Met school educational calendar.

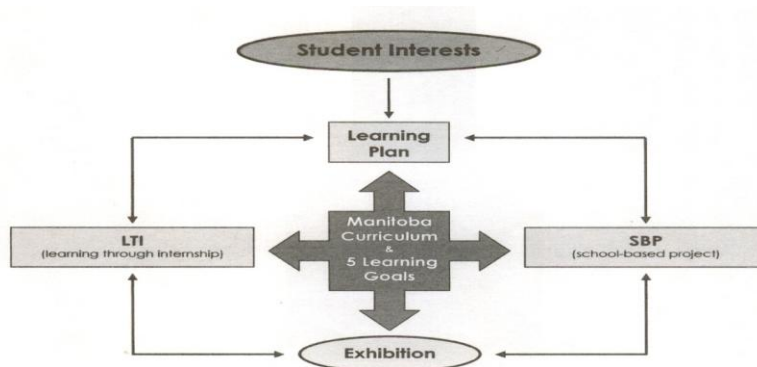
BPL’s philosophy of relationships, relevance, and rigor influenced the Met School Learning Model. Relevance, translated into student interests, is the driving force in the model. The intentions of the plan follow:

While the five Met School Learning Goals frame the entire process, the individual student interests determine the Individualized Learning Plans. This includes the student internship placements (learning through internship – LTI) and school-based projects (SBP). These SBPs can range from workshops (including field trips, lectures and guest speakers), GCC courses, and independent, group, advisory, or whole school projects. It is through the LTIs and SBPs that the student will address the specific Manitoba curricular outcomes in order to obtain their required high school credits needed for graduation. The Met School Learning Goals are closely linked to Manitoba curricula. Empirical reasoning, quantitative reasoning, communication, social reasoning relate directly to the

Science, Mathematics, and English Language Arts and Social Studies curricula respectively. The fifth learning goal, personal qualities, permeates all learning experiences. (Warren et al., 2009)

The model is outlined in Figure 4.1.

Figure 4.1
Met School Learning Model



Adapted from *Seven Oaks School Division Met School Academic Plan*. Warren et al., (2009).
(Available from the SOSD Met school).

The learning plan, which totaled 14 pages, created by the staff was comprised of the Manitoba curricular outcomes, grade level standards, LTIs, SBPs, Met school learning goals, assessment plan, timelines, and resources needed for completion (Warren et al., 2009). Tracking documents created for the core courses covered all General Learning Outcomes (GLOs) and Specific Learning Outcomes (SLOs) and were applied to the five learning goals of BPL. The student and his or her advisor had the responsibility to link LTI projects and SBPs curriculum. This information is placed directly into the Learning Plan created on the BPL website –

www.bigpictureonline.org. Three forces shaped the learning plan: BPL, Manitoba Education and the individual student aided by the advisor.

The exhibitions and assessment conformed to the philosophy of BPL with respect to quarterly exhibitions, ongoing dialogue, and portfolio development. Documents contained in the Learning Plan include the set criteria for the quarter, curricular outcomes, journals, and LTI and SBP work. Advisors assess the rigor of the work in terms of depth and breadth. Credits for high school are obtained through student LTI projects and SBP work. A general 5-point rubric created by the staff was developed to assess student progress and the extent that goals have been met in the quarter.

The Academic Plan also forms the guide for staff to address provincial outcomes with BPL goals. SOSD wanted to offer a Met styled program so the need to address the provincial concerns is critical in order to carry the innovative program forward.

The key aspect for aligning the documents would have been a matter of taking outcomes and seeing how and where they would fit in the five learning goals that Met students are to pursue. While challenging in itself, the planning would have to be open enough to meet the requirements while providing for the openness and variety of individual student interest and choice. The framework of necessity would be tightly intertwined but loosely implemented, as no two students would have identical interests or needs. In order to address the GLOs and the SLOs in the academic year, the SOSD Met Calendar (Appendix P) formed a component of the Academic Learning Plan. The implementation phase would be the responsibility of the SOSD Met staff. Once implementation occurred after September 08, 2009, the student focus would drive the program and the education delivery model would radically be changed to personalize

learning. Once implementation occurred, the change for the students in terms of how they participated in their education and how staff participated in this reconfigured environment would not be linear and at times characterized by chaos.

Taking the change in the content of the strategy, driven by the BPL philosophy of “one student at a time” as exemplified by the five distinguishers and the requirements of Manitoba Education, the Academic Plan aligned the program offered by the SOSD Met along with dramatically altering the organizational structure of the school. While planning represented rational decision making in terms of addressing the external and organizational conditions, the creation of the academic plan reflects the cognitions and actions of the four individuals that comprise the CLG. Once the Academic Plan was implemented in September 2009, the very nature of the school was under development as student and staff worked through the first year of operation. The experiences of both groups within the context of SOSD Met have familiar stories with The Met or other Met styled schools yet will have their own, which renders them unique. The content of the strategy as portrayed in the AR-S Model represents a powerful idea in determining the magnitude of change and the CLG’s responses to environmental and organizational conditions.

Further planning covered other aspects of assessment, LTI, and logistical matters that needed consideration before the summer break.

We developed a full academic plan and we still refer to it regularly. It was lengthy, it talked about the school calendar as a whole, what does the entire year sort of look like? We were not used to scheduling exhibitions; what do those look like, what does parent involvement look like, how are we going to work out visiting internships and taking students to interviews? There were logistics we had to figure out and we made sure that

we figured all those things out and had a plan of attack in June when we broke for the summer. (Teacher B, Interview, April 19, 2011)

The Rational Lens Perspective

The following section of the chapter details the findings that address the first research question.

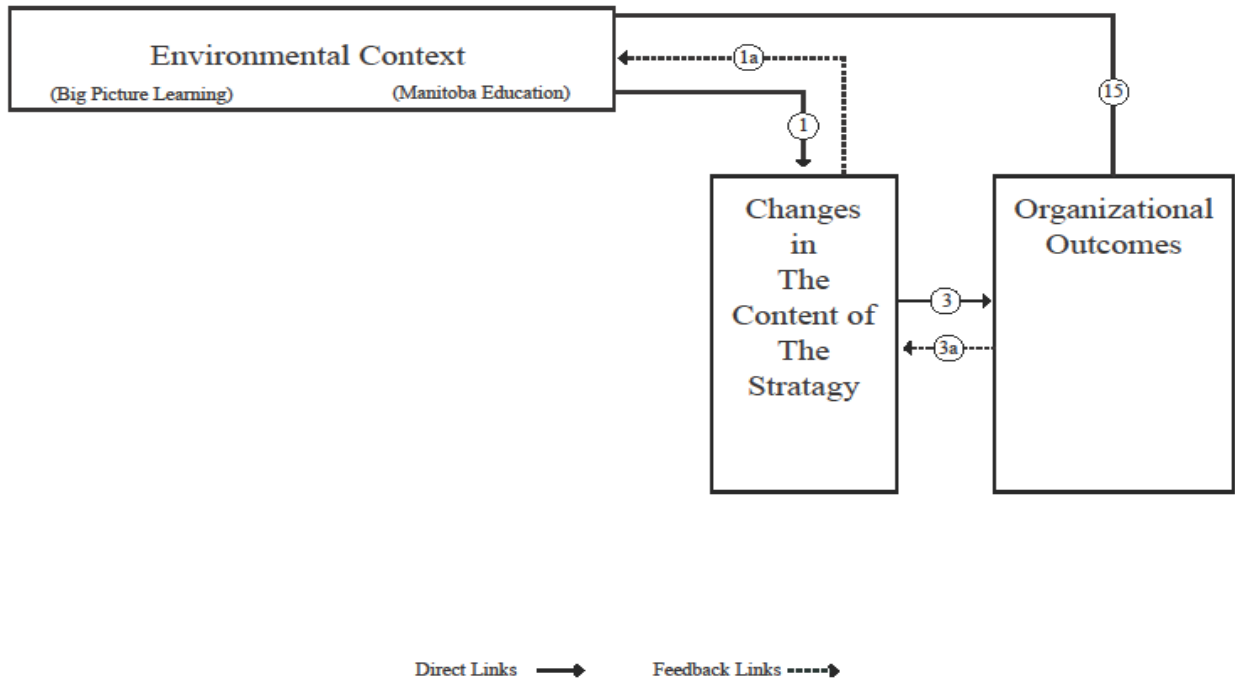
Research Question 1. *To what extent is this particular version of the content of the strategy a rational choice in light of the goals and constraints posed by the environmental and organizational factors?*

In collecting the data, two bodies/institutions constitute the environmental context – Big Picture Learning (BPL) and Manitoba Education. A description of each institution along with the goals and constraints placed on the content of the strategy are presented. The next section deals with the organizational conditions and specifically three organizational layers of Seven Oaks School Division. The third section outlines the environmental and organizational tensions that presented in the study. Lastly, based on the information collected, an analysis determines the extent to which the choice of the content of the strategy constituted a rational choice.

Environmental Context

The rational lens perspective stipulates that change in an organization's content of the strategy must address the realities of the environmental context (Link 1) in order to achieve organizational outcomes or to be successful as depicted in Figure 4.2.

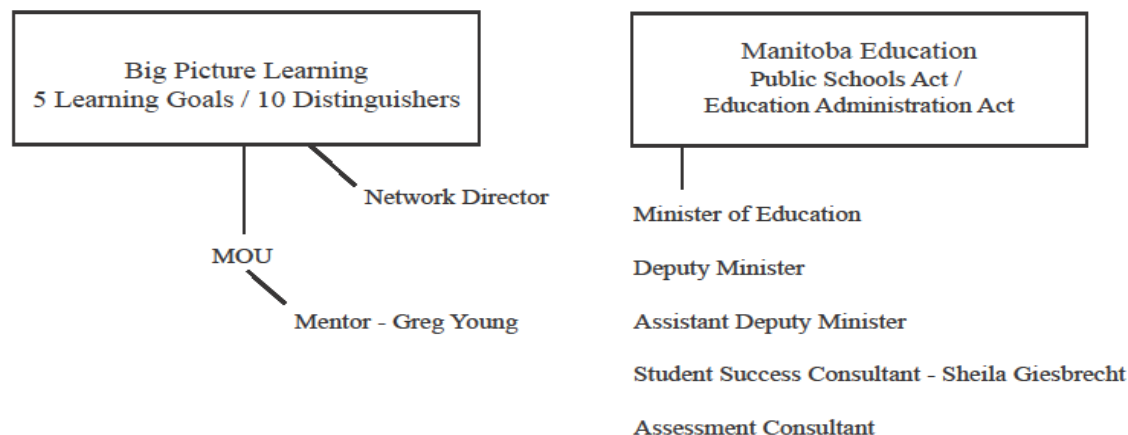
Figure 4.2
Environmental Context



The two institutions identified, in the construct of the environment that exerted pressure, set expectations, and influenced the SOSD Met school are Big Picture Learning (BPL) and Manitoba Education. Each of these institutions is comprised of elements and agents that directly shaped the change in the content of the strategy (Figure 4.3). While change in the content of the strategy involves planning, the opportunity for emergent strategies (Mintzberg, 2009) to form, acknowledges the complexity of programmed change initiatives.

Figure 4.3

Institutions, Elements, and Actors in the Environment of the SOSD Met School



Big Picture Learning

Big Picture Learning is a not-for-profit education design organization founded in 1996 to support the development of The Metropolitan Regional Career and Technical Center (The Met) in Providence, Rhode Island. The Met and BPL were co-founded by Dennis Littky and Elliot Washor, two experienced teachers at Brown University's Annenberg Institute for Educational Reform (Meier, 2004). BPL designs innovative schools, conducts research and replicates new models for education in Australia, The Netherlands, Israel, The United States and recently in Canada.

In a Met school, curricula designed around the philosophy of one student at a time is driven by three overarching factors: (1) planning by those who know the student, (2) teaching focused on knowledge acquisition and skill development, and (3) real world experiences

incorporated into the day-to-day activities of the students (Littky, 2002). The curricula draw from five areas termed as learning goals by BPL: empirical reasoning, quantitative reasoning, social reasoning, communication, and the development of personal qualities (Appendix Q). A key distinguisher of a Met school is authentic assessment in that exhibition and narratives replace grades.

Big Picture Learning (BPL) is a significant institutional factor in the environment as expectations outlined in the Memorandum of Understanding (MOU) set out the criteria (Appendix R) for the development of a Met school. The MOU between SOSD and BPL constitutes an institutional force applied from the environment to the Content of the Strategy and is theorized in the AR-S Model's Environmental Conditions and Changes (Link 1) as diagrammed previously in Figure 4.3.

Manitoba Education

The British North American Act of 1867 renamed the Constitution Act of 1982, constitutionally assigns the responsibility for education to the provinces rather than to the federal government, with some important exceptions. Adjustments to each delivery system then are more of a matter of local or regional concern, rather than what occurs in the nationally sponsored programs such as one finds in Great Britain. The presence of national organizations such as the Council of Ministers of Education, the Canadian Education Association, or the Canadian Association of Principals forms a loosely linked information and data sharing exchange amongst the provinces. "The Council of Ministers, which represents the ministries of education in each of the provinces and territories, provides a rather tenuous cohesion among educational policy makers and administers national performance assessments for the purpose of inter-provincial

comparisons” (Hargreaves and Fink, 2006, p. 257). The other organizations are professional or political organizations that form loosely coupled information sharing networks. This context creates a local view for school driven and district directed change efforts to improve education for the nation’s school age population.

Manitoba is geographically diverse, is historically ‘a have not province’ has recently experienced an alternative approach to education reform (Levin & Wiens, 2003). Over the last fifteen years an alternative approach known as “the *Manitoba Education Agenda for Student Success* has focused “on teaching and learning, respecting all participants, building capacity, and making use of research” and is believed to provide the way to achieve lasting benefits for students (Levin & Wiens, 2003, p. 658).

Manitoba Education is a critical institution in the environment of SOSD Met. The minister has the power to authorize, under Sections 3 and 4 of The Educational Administration Act, the granting of credits toward a Manitoba High School Diploma to a public or private school offering grade 9 - 12 courses. Under the Public Schools Act (PSA) [C.C.S.M. c. P250] schools grant credits, based on the power authorized by the minister, in accordance with high school regulations (Province of Manitoba, High School Graduation Requirements Regulation 167/99, Registered December 7, 1999, Schools Special Set, 2006). The granting of credits by the SOSD Met school is a key feature, as the content offering and the receipt of credits offered through the SOSD Met are not conventional and therefore in question.

To provide a clear understanding of the nature of this issue, it is important to develop an understanding of the governance structure of Manitoba Education and then the provincial high school credit system. As noted earlier, education in Canada is under the jurisdiction of each

province. In Manitoba's context, the ruling political party that forms the provincial government relies on Manitoba Education to administer, set policy, and oversee K-12 education and post-secondary education in the Province of Manitoba. The governance structure adheres to a hierarchical structure that situates the Minister of Education as the head of the Department with the powers of the minister stipulated in The Education Administration Act (Province of Manitoba, Schools Special Set, 2006). The Minister's authority flows through the Deputy Minister through various Assistant Deputy Ministers who lead departments responsible for education services in Manitoba.

Since amalgamation in 2002, there are 37 school divisions (Yeo, 2008) in the Province of Manitoba. Each division has its own elected school board and an appointed Chief Executive Officer/ Superintendent with a contingent of central office staff who administer, develop policy and procedures, and carry out the day-to-day operations of division business. While school divisions vary in enrolment and geographical size, each is characterized by organizing instruction through three groupings: Early, Middle and Senior years. The focus of this case study is at the Senior/high school level. While schools have the responsibility to meet Manitoba Education curricular outcomes through provincially accredited courses, school-initiated courses can be developed and approved for credit toward graduation. School initiated courses address the interests of staff and the students who register for them as optional courses. School principals are the instructional leaders of schools in both policy and regulation (MET, 1995; M.Reg. 468/88R Part V5. 68/97, September, 1997).

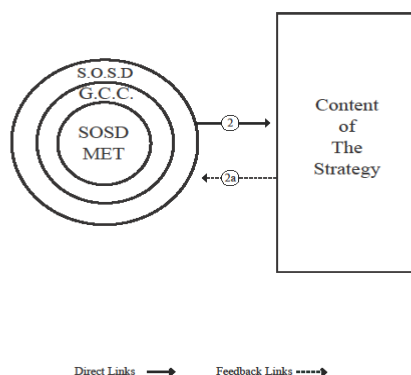
It is within this system of education that Manitoba Education exerts its authority through ensuring a certain standard of education for the residents of Manitoba. Under the current system, credit requirement (English Program) for students graduating in the Province of Manitoba is 30

(17 compulsory & 13 optional credits from Grades 9-12) (MECY, 2008, p. 10). Specifically for Grade 9 & 10 students, who comprised the first students to enroll at the SOSD Met in September 2009, ten compulsory credits are required: one credit per year in each of English Language Arts, Social Studies, Science, Mathematics, and Physical Education/Health Education (PE/HE) (MECY, 2008, p. 18). As of the 2008-2009 academic year, students entering grade 9 required four compulsory PE/HE credits to graduate (MECY, 2008, p. 10). The current model of education delivery in Manitoba high schools as evidenced by past practice requires students to complete 110 hours of instruction for each grade level requirement. Class periods typically last 70 minutes/day/semester and are subject/discipline specific. Course credit is typically granted upon completion of the course with a passing grade of 50% or higher.

Organizational Context

Similar to the findings for Link 1, I now look at the results associated with the Organizational Context (Link 2) and the Content of the Strategy (Figure 4.4). The organizational context (shown in Figure 4.4) shows the SOSD Met as a distinct school, housed in Garden City Collegiate. Both schools are part of the Seven Oaks School Division.

Figure 4.4
Relationship Between Organizational Units and the Content Of The Strategy



The placement of GCC as an organizational factor follows several reasons. Firstly, the school shares similar routines and policies with the SOSD Met. Secondly, both organizations share students, facilities, and resources. Thirdly, there are times, timetable planning for example, when the administrators work cooperatively in developing the timetable for GCC. Lastly and crucially, SOSD Met credits are entered under the GCC school code when reporting high school credits to Manitoba Education.

Organizational Layers

The first layer of the organization is SOSD, an urban school division in the City of Winnipeg. The context for this study is in Seven Oaks School Division (SOSD), established in July 1959 in the North West area of Winnipeg, Manitoba. Geographically it encompasses the communities of West Kildonan, Garden City, the Maples, Riverbend, West St. Paul and St. Andrews. The division is anticipating enrolment of over 10,000 students in September 2011 with an approved budget of \$109,123,373 (SOSD, Budget Presentation, 2011).

The agents¹⁷ of SOSD are comprised of the Superintendent of Schools (Brian O’Leary), the Principal (Steve Medwick) of Garden City Collegiate (GCC), a vice principal of GCC (Howard Kowalchuk), and board chair of SOSD (Claudia Sarbit). Steve Medwick and Howard Kowalchuk are actors in the broader divisional culture and are treated in this regard as part of the organizational context as both were in the host school (GCC) during the development of the SOSD Met.

The ability of Seven Oaks School Division as an open system to respond to the environmental conditions and changes is conceptualized by three sets of concepts widely

¹⁷ Agents or change agents are responsible for change.

described in organizational and educational journals: capacity, growth/decline, and opportunity/threat.

In terms of organizational capacity, Howard Kowalchuk, then a vice-principal of GCC, reported that he had become aware of the Met school concept in 2005 while attending a Coalition of Essential Schools Conference in Boston, MA. (H. Kowalchuk, Interview, March 22, 2011). It was here that Howard met Dennis Littky¹⁸, and through the course of the conference, he was able to chat with Littky about his ideas and the ideas behind The Met Center of Providence and Newport, RI. While the creation of a Met school in SOSD was not a consideration in Howard's mind at the time, the ideas resonated with him. Upon his return, along with the other administrators of GCC, he acquired Littky's book, *The Big Picture: Education is Everybody's Business* for the entire staff (H. Kowalchuk, Interview, March 22, 2011) and used the book to supplement his thinking on advisory systems. This professional reading activity aligns with the SOSD ethos of investing in the management capabilities of administrators through conversation. "We tend to be a school division that does a lot of reading and as a leadership group will read three to four books a year as a group, have conversations about our various experiences, and then have people pursue their own directions" (B. O'Leary, Interview, May 4, 2011).

For us, part of the decision to bring the Met to SOSD is bringing those practices into the division where we can learn from an experience base, develop them further and get good at some of them. With a Met school there are a number of finer points for organizing instruction in this novel approach and our teachers expressed a need for coaching. We moved fast on getting the Met up and running but we are going to be patient with the growth and not try a forced growth approach. One of the things that I

¹⁸ One of Ted Sizer's first Coalition high school principals.

have learned in this office is there are many things we often start without realizing how much time and effort they require. We tend to underestimate the work and difficulty and overestimate the initial benefit, but once the program is established, usually it is more successful than we thought possible. (B. O'Leary, Interview, May 4, 2011)

Steve Medwick, principal of GCC, commented that the staff at the collegiate had tried an advisory system once before Howard, Adair and he arrived, which ended in failure (April 19, 2011). While the negatively perceived experience by staff remained in people's minds, a strategy to reengage staff in discussion about advisories was to read Littky's book and then discuss it through the lens of good teaching practice and how lessons learned at the Met might be applied to the collegiate (S. Medwick, Interview, April 19, 2011).

Brian O'Leary as well made note that it was one of the four books that the administrator group read as part of their professional development activities as an administrative council (B. O'Leary, Interview, May 4, 2011). Therefore, in 2005-2006, staff and division administrators were becoming familiar with the concepts and having conversations around differing aspects of Littky's work.

Recent research on school failure (Murphy & Meyer, 2008) addresses the concept that schools can go through periods of growth and decline. In terms of SOSD and its three high schools, enrolment has been increasing which in 2011 presented new challenges for the division with respect to housing increasing numbers of students. GCC received a 10 million dollar addition linking the two wings of the school through a glass-enclosed common room (S. Medwick, Interview, April 19, 2011).

An interesting opportunity presented itself for Brian O’Leary when he served on the organizing committee of the Manitoba Association of School Superintendents (MASS). Given the opportunity to act as Elliot Washor’s chauffeur, who was presenting at the fall MASS 2008 conference, Brian engaged in conversation with him about getting a Met started in Manitoba (B. O’Leary, Interview, May 4, 2011). There was sufficient interest in the idea that members of SOSD went to The Met Center in Providence, Rhode Island in January 2009 for a conference.

The superintendent used this opportunity to move rather quickly in pursuing the SOSD Met school. Brian signed the Statement of Agreement Regarding the Establishment of Big Picture Schools, hereafter referred to as the MOU, on February 10, 2009 and by the Co-directors of BPL later that month (Appendix R). The standard BPL MOU has eight sections that are as follows:

- 1) Scope of the Agreement,
- 2) School Division Responsibilities (17 points),
- 3) BPL Reserved Rights (2 points),
- 4) Offer of Services,
- 5) License and Trademark,¹⁹
- 6) Limitation of Liability,
- 7) Notices, and
- 8) Signature Lines. (MOU, 2009)

¹⁹ Contingent on the faithful implementation of the core BP design components and elements

While the detail of the MOU is contained in Appendix R, several of the Division's responsibilities are listed with their accompanying numerical placement in the list to provide the reader with a sense of the conditions:

- 6) Select, in collaboration with the Big Picture Company, and appoint a principal(s) for the new school(s). Pay the salary and benefits of the principal(s) during the planning year, pursuant to the district's pay scale.
- 7) Provide training and support to the principal(s) during the planning year and release principals to participate in Big Picture principal training.
- 9) Develop a comprehensive curriculum addressing Big Picture School learning goals and appropriate District Academic Standards.
- 10) Apply for waivers from traditional regulations that would impede the full implementation of the Big Picture school design.
- 13) Employ a non-selective student recruitment and enrollment process.
- 16) Participate in the Big Picture annual peer performance review process. (BPS, 2009)

This action occurred within a school division environment that was making its high school philosophically more like middle schools.

Based on our previous work implementing new structures and program experiences in the middle years, we also started talking about the individual needs of kids and that is the philosophy of one kid at a time. During this time, we moved to GCC as an administrative team and our philosophy came with us. This accounts in part for the planning of our advocate program and in our transition year program for grade 9 students where they are

with only two teachers primarily for their first year of high school. (S. Medwick, Interview, April 19, 2011)

Further, the leadership of the superintendent, the school board's receptiveness to change, the financial ability of the board to support the innovation, and the division's vision, all give evidence of the institutional capacity of SOSD. In the central office of SOSD, the leadership of Brian, the superintendent, is demonstrated through two recent examples of innovative programming, according to the past chair of SOSD Board Claudia Sarbit - Bright Futures and the SOSD Met.

The Seven Oaks School Board is always looking for ways to improve education for all our students including students at the high school level. One of our goals has been to increase high school graduation rates and to increase the number of high school graduates who choose to pursue the many post-secondary options available to them. We have embarked on various initiatives to achieve these goals. The Bright Futures program, which we initiated before we started our Big Picture Met School, has been extremely successful. Bright Futures is a mentorship program which helps students in the Elwick and Watson communities with their homework to increase their success at school helps them develop life goals, and encourages the exploration of post-secondary education.

(C. Sarbit, Interview, August 24, 2011)

The Bright Futures program involves an after school volunteer program at an off campus site that provides students help with homework and assignments along with tutoring and mentoring (SOSD, 2011). This program proved to be very successful in helping students (C. Sarbit, Interview, August 24, 2011). Shortly after the Bright Futures program was initiated, the

board viewed a *YouTube*© program describing the philosophy of the Met school by Littky. This combined with a board retreat in 2008 continued the dialogue the board was having regarding graduation rates:

We were introduced to the MET School concept at our annual board retreat in the spring of 2008 and were generally in favor of the concept. The board discussed the concept in more detail at subsequent board meetings, gained more information about how Big Picture Schools work elsewhere, how it would work in our division, the benefits to our students and the costs involved. After much discussion, the board decided to implement it in the division at Garden City Collegiate with a few classes at the Grade 9 and 10 levels on a trial basis. (C. Sarbit, Interview, August 24, 2011)

The *YouTube*© program on the Met interested the members of the board as it fit with their discussions on improving graduation rates and participation rates at the post-secondary level. Discussions occurred over a period with the board being supportive of the venture and making the commitment to the project through its budget deliberations in March 2009.

When asked about the speed at which the SOSD Met was created, Claudia responded:

We do not believe it was a quick decision as it was compatible with our stated goals for our high school students. Our superintendent, Brian O'Leary, gave us the information we required and we felt confident it would be of great benefit to those students who took advantage of the program. A traditional high school program is not for everyone and this is another great option for our students. We were also getting support from Big Picture Schools who would be helping our MET School staff with implementation and the board

would be monitoring the program closely to ensure it met our expectations. (C. Sarbit, Interview, August 24, 2011)

The discussion referred to in the previous excerpt occurs within a division ethos that desires to improve educational opportunity for students and features an openness to explore innovative programs. In order to achieve this type of openness or culture as described by Schein (2004), trust is a key factor.

. . . Another thing I want to say is that there is a high trust level at the board in the superintendent. We all believe that when he comes to us, it is not because he is looking to his own best interest, he is interested in what is in the best interest for children. I think that helps when you have that relationship with your superintendent. (C. Sarbit, Interview, August 24, 2011)

An early response by Superintendent Brian O’Leary to his perceived concern about the granting of high school credits in a non-traditional fashion resulted in a meeting with the Deputy Minister of Education in the early part of 2009. This action represents institution-to-organization interaction (Figure 4.2, p. 80) that mediates the Environmental Context (Link 5) that bears on and influences the awareness [cognition] of the Met Coordinator²⁰, Adair Warren, and her subsequent actions (Links 13 & 6) as depicted in Figure 5.3, p. 154.

A second intention of the meeting was to bring the Department “on board” to the proposed creation of a Met school that was in the exploration phase (B. O’Leary, Interview, May 4, 2011). The government was receptive to the idea and gave permission to its Student Success

²⁰ The position was titled Met Coordinator, as the SOSD Met was not in existence at this time.

Consultant, Sheila Giesbrecht, to accompany the SOSD staff on its trip to Providence, Rhode Island (S. Giesbrecht, Personal Communication, August 10, 2011).

Of immediate interest is the decision by Brian to commit to moving forward with a Met school design. This decision reflected his interest in school change that had occurred in schools in Harlem, New York and Thayer, New Hampshire under the leadership of Debra Meier and Dennis Littky respectively. Brian recalled that:

. . . We explored a few places and I said, “We might like to give it a go, how would we go about it?” From that, we quietly arranged to take a group of people to Providence and do a multi-day visit. I already had it in my head that I would like to give this a go and I had already met with the Deputy Minister. (B. O’Leary, Interview, May 4, 2011)

The trip occurred in January 2009 and by February 2009, Brian had signed the MOU that officially committed the division to developing a Met school.

Next in interest is the principal appointment. To avoid a contract issue in the creation of a new administrative position “we didn’t advertise a principal position for the Met as we just appointed Adair and officially she is still classed as a GCC vice principal and we have not yet negotiated a position into the collective agreement” (B. O’Leary, Interview, May 4, 2011). In Brian’s mind, he believed that there were only two candidates for the tasks of creating and administering the Met. Both candidates were called into his office on a Friday afternoon in January 2009, and presented with the challenge of deciding between the two as to which of them would take on the leadership role of the SOSD Met.

After the board approved our trip, both a colleague of mine and I were asked to come to the board office and talk with the superintendent about the potential of developing the Met school in Garden City and to see if either one of us or both of us might be interested

in leading the project. I think the thinking there was that if you are going to develop something in an existing school; it helps to have a connection to that school. I do see that as having been a significant strength and I think as challenging as the process was, it may have been more challenging to have a person from outside the school take on that inside the school role of developing a new school. (A. Warren, Interview, March 7, 2011)

The two decided that Adair would take the lead on this project and be the principal. At that time Adair was the vice principal of GCC, and so it was a simple matter of reassigning her to the SOSD Met full time while keeping her status as a vice principal. No action had been undertaken to obtain another administrator position through the board. The position of Met Coordinator was absorbed through the Garden City Collegiate administration even though a replacement for Adair's other duties within the school was appointed for the balance of the term (B. O'Leary, Interview, May 4, 2011). Adair kept some of her duties as Vice Principal of GCC such as graduation ceremonies (A. Warren, Interview, March 7, 2011). It remains at the time of this writing, that the position of Met principal is officially listed with GCC as a fourth vice principal for budget purposes. Adair's official title, however, is principal and she has the full authority of a principal.

It would appear that BPL was comfortable with this process as no official or unofficial concern was registered and Adair remains as principal of the Met. The hiring procedure and what occurred in lieu of training will be discussed in the next chapter under subsection titled Principal Cognitions and Actions.

Environmental and Organizational Tensions

Clearly, without traditional subject matter boundaries and assessment strategies to assess course outcomes, concern over academic rigor²¹ and therefore credit acquisition come under scrutiny. In addition, due to the Met school's public profile (newspaper articles²², and announcements) and the interest generated around the project, this became an even more pressing point of concern in terms of accountability with the province (S. Giesbrecht²³, Interview, April 21, 2011). "In terms of alternative programs, you're much more interdisciplinary and you need to have essential learning outcomes in order to facilitate schools working in that direction" (S. Giesbrecht, Interview, April 21, 2011). Further, Sheila believed that while she enjoyed working with innovative models, her preference would have been for a model developed locally:

My first preference is always the localized model, which lets us self-design but in this case, they are going with sort of a pre-packaged approach, but it is still interesting to watch them evolve. . . A localized model always has a better chance of success because when you take a program that is pre-packaged, it does not necessarily meet your entire program and its components. (S. Giesbrecht, Interview April 4, 2011)

The issue with Manitoba Education was identified by Greg Young (Big Picture Mentor) through his view on what challenges the group faced: "To be honest, I think that the biggest issue that the staff struggled with and on which I tried to work with them was mostly centered around the Manitoba standards" (G. Young, Interview, March 16, 2011). How the SOSD Met school

²¹ Rigor defined as the ability to perform on standards tests.

²² For an example, see Appendix S.

²³ Student Success Consultant.

staff were to deal with accountability, in terms of addressing the essential learning outcomes in the Manitoba curriculum, would be critical to whether the program would in fact become reality.

In the signed MOU (Appendix R) 17 specific conditions were expected of the school district [division] and two listed conditions were reserved to BPL. In exchange for a contracted fee²⁴, BPL would agree -

To assist the district in carrying out these tasks, Big Picture will provide services as needed and requested by the district, including coaching and consulting, access to Big Picture Online, print materials, video conferencing, training, support, and conference/workshop attendance. (MOU, 2009)

The specifics of the contract are contained in the primary source document set (Appendix T) titled *Proposal to Seven Oaks School Division to Provide Technical Assistance and Support in the Development of a Big Picture Inspired School, September 8, 2010* [hereafter referred to as The Proposal] (Big Picture Services, 2010). Accompanying The Proposal was the Draft Big Picture Services Support Plan (Support Plan, January, 2009) that provided the breakdown of services offered by BPL with respect to establishing the SOSD Met. Only two assumptions are stated in the Support Plan – (a) “the opening of a school-within-a-school (S-W-S) Big Picture design in the Fall of 2009” (BPS, 2010) and, (b) that the school would begin with two or three advisories with no more than twelve to fifteen students per advisory and one principal.

A section of the BPL-SOSD agreement covered what came to be known as TYBO (The Year Before Opening) from January to July 2009. Also included in the agreement was BPL’s proposal for the services it would provide at a cost of US \$26, 000 which included “13 days of

²⁴ Principal and Advisor Development: US\$12,200, and TYBO: US\$26,000.

on-site consulting (and associated costs), attendance at [the] April Conference, and two site visits to Big Picture Schools” (BPS, Draft Proposal, January, 2009). The TYBO covered the basic organization of the school.²⁵ The Support Plan also included professional development service, directed at the principal and advisors, from July 2009 - July 2010 (BPS, Draft Proposal, January, 2009). A typical outline of services for each month in the Support Plan is exemplified by the January 2010 activities list:

- Professional Development Focus: school culture, grade-level expectations, internships, project development.
- On-site visit from network consultants – focus on student recruiting, planning and process.
- Weekly Network News from Big Picture, monthly Learning Through Interests Coordinator network call.
- Help plan and implement family engagement activity.
- Mid-year narrative reports to school/board. Mid-year, school self-evaluation.
- Weekly principal coaching call. (BPS, Draft Proposal, January, 2009).

Other services offered in the remaining months of the year (until July, 2010) included: a monthly professional development focus; networking opportunities for BP principals and staff; visits from network consultants; planning and implementation of grade-level expectations;

²⁵ This included “class set-up, requirements, content, schedule, links to local and national standards, portfolio requirements, required district and national assessments, potential in-take assessments, arrange waivers as needed” (BPS, Draft Proposal, January, 2009).

interest exploration; development and learning goals; advisory culture²⁶; project conference opportunities; and plan for the 2010-2011 academic year.

In fulfilling the obligations of the MOU by each party, several noteworthy exceptions occurred: principal appointment; training of the principal; principal planning time; and the authority of the principal to hire. Through the interview with Superintendent Brian O’Leary, it was conveyed that due to the “Manitoba context” exceptions just recognized the reality of a Manitoba school division’s accountability to the Government of Manitoba, the existing contract negotiated with the Seven Oaks Teachers’ Association²⁷ and current school division policies and procedures (May 5, 2011). Within this environment, BPL did not have input into the principal appointment, as this power falls under the authority of the school division in the Public school Act (PSA) (Schools Special Set, Volume 1, 2005). The training period of one year did not happen due to time constraints and more importantly the confidence level that BPL had in SOSD and the administrative personnel. The MOU covers local situations where newly appointed principals of Met schools possess a limited experience base along with being a charter school with limited access to resources. In the case of the SOSD Met, administrative experience was deep and the division offered many supports and resources (A. Warren, Personal Communication, July 15, 2011). In addition, the school had to be ready for operation in eight months, which compressed the planning time outlined for the principal. Finally, a school board to the superintendent generally delegates the hiring of staff within a public school division

²⁶ “The advisor’s role is to manage the student’s LTIs and individual, personalized Learning Plans. To do this, the advisor must get to know and build relationships with each student and his or her family (this includes home visits and one-on-one meetings with each student). Though certified in one area, the advisor does not “teach” his or her subject area; rather he or she draws on many disciplines to meet the needs of each student, their projects, and the advisory activities.” (MOU, 2009).

²⁷ The clauses that may have presented issues for the SOTA are contained in the standard BPL’s MOU regarding staff hiring, duties and work load. In the end, no issues were ever raised as conditions outlined in the MOU did not take full effect. BPL it would appear had confidence in SOSD’s ability to carry out implementation of a Met styled program.

(Section 52 (1) of the Public Schools Act , Province of Manitoba, Schools Special Set, Volume 1, 2006).

A significant part of the MOU pertains to services provided in the form of coaching/mentoring. The mentor assigned for the Met in SOSD was Greg Young. Greg's introduction to the SOSD group was initially through its visitation to the Met in Providence, Rhode Island in January 2009, where he was an advisor, and through their attendance in a couple of workshops that Greg and his students were facilitating during a January conference (G. Young, Interview, March 16, 2011). Two months later, in early March 2009, Greg and two of his students were invited to Winnipeg where student-led presentations to five grade 8 classes were conducted (A. Warren, Interview, March 7, 2011). In addition, joint presentations by Greg's Met students, himself, and Adair were made to teachers and administrators followed by Elliot Washor (co-founder of BPL) who presented to a group of five hundred parents (G. Young, Interview, March 16, 2011). Shortly after these presentations, the decision to move forward with a Met school in SOSD occurred. Starting in August 2009 Greg, in his role of mentor, made his first of six trips (totaling 17 days of contact time) to Winnipeg to work with the SOSD Met staff in preparation for the 2009-2010 school year (BPS, Draft Proposal, January, 2009).

When asked about a typical start-up of a Met school, Greg conveyed that every Met school starts up differently because of each school's unique context. Schools can start "with eight to nine advisors, multiple administrators and upwards of 100 students" and under different national, state, or local policies (G. Young, Interview, March 16, 2011).

Specifically the SOSD Met started with three advisors, one administrator and a targeted first year enrolment of 30-40 students. The school housed within GCC as a school-with-in-a-school (S-W-S) would follow a similar pattern to other Met schools in the United States (G.

Young, Interview, March 16, 2011). The decision to house the SOSD Met within GCC served a few purposes. First, a new building would not be necessary, as there was space available within the high school. Secondly, students would be able to access specific programs such as band, choir, performing arts and extracurricular programs such as football that a small school could not support. Further, both the Principal and the Vice Principal were supportive of the concept and were colleagues of Adair as part of the GCC administration team.

Before Greg arrived for school start up in August, staff attended the annual August Big Bang Conference in Providence, Rhode Island. The Big Bang Conference has representatives from fifty to sixty BP schools from around the network who participate in two to three day training and “big” planning sessions (G. Young, Interview, March 16, 2011). In addition to the professional development activities afforded through BPL, coaching and consulting along with other training and supports were available at the request of the division/district (MOU, 2009). The role of BPL mentor is one of coaching and mentoring the advisors and the principal.

I do not make personnel judgment decisions about staff capacity or about the quality of work carried out by the staff. I do try to help; it is like tumbling down the rabbit hole with Alice in Wonderland – I attempt to ascertain where staff is at, what they are doing well, what they are struggling with, and help them figure out those necessary next steps. This occurs in an environment of full disclosure in that I will be talking to Adair about items that can support them in their work. (G. Young, Interview, March 16, 2011)

Further, in a second interview, Greg expanded on his role as mentor through the leadership role that he assumes in the process of staff and principal development.

It is a very different structure in terms of leadership as well because it is not an evaluative leadership position. I am also coaching Adair about how to work and develop her staff,

about how professional development addresses their weaknesses, and about how to further develop their strengths. (G. Young, Interview, March 23, 2011)

The expectations set out in BPL's MOU did not conform with respect to how a student was to graduate from a high school in Manitoba as established by Manitoba Education outcomes. For example, in *Attachment A: BPS Philosophy and Design* (Appendix A), a line as part of the description on authentic assessment reads – “students engaged in this process at BPS are not assessed by tests and are not given grades” (MOU, 2009). In order to grant credits, compliance with regulations would remain as graduation criteria according to Manitoba Education (MECY, 2008). It was the task of the SOSD Met staff to ensure outcomes were achieved and in doing this, created the Met School Academic Plan with the inclusion of GLOs and SLOs in each student's Education Plan. Manitoba Education officials were satisfied; their concern over academic rigor reduced to the point where credits granted by the SOSD Met were accepted. It is important to note that in reporting credits to the province, SOSD Met students' credits are recorded under GCC's school code. These marks are electronically transmitted to Manitoba Education at the end of the school year. BPL's expectations of the SOSD Met, through its own philosophy of personalization, vision, and unique design “gelled” into a Manitoba context. As long as the ten distinguishers were incorporated into the school, it appears that there was “the flex” required to operate in a Manitoba environment. The school board remained supportive in terms of the school, staff, and administration (A. Warren, Interview, March 7, 2011; B. O'Leary, Interview, May 4, 2011). The leadership role of Brian and the school board's vision of helping students achieve more than just graduation created a context where innovative ideas such as Bright Futures or the Met could take hold.

The Assessment Consultant, working in conjunction with Sheila Giesbrecht on behalf of Manitoba Education reviewed the Met Academic Plan and found it to align with Manitoba guidelines. Consequently, the program was allowed to proceed (S. Giesbrecht, Personal Communication, May 30, 2011). Without the alignment of BPL learning goals with the provincial curricular outcomes, the school could not grant credits. This development of an innovative program represented more stress on the Department's part as it wanted to play a collaborative role with the division that never materialized (S. Giesbrecht, Interview, April 21, 2011). During my interview with Brian O'Leary, Superintendent of SOSD, he expressed the view that the division's intention was to keep the province informed as to what the program looked like, and did not think any direct assistance was required, as he had confidence in his staff's capabilities (B. O'Leary, Interview, May 5, 2011). The lack of alignment with a student's academic plan between PBL goals and with those of the province would necessitate the intervention of the province by Manitoba Education. This concern over rigor presented the most significant area of tension between Manitoba Education and the SOSD Met.

Part of the tension of the SOSD Met school's staff was to accurately employ the Met philosophy about one student at a time while being able to meet outcomes for each of the typically nine course credits earned at the end of grade 9 and 10 (Manitoba Education, 2011). This aspect of the issue, because of the involvement of the entire staff, is addressed under the section titled - Collective Leadership Group Cognitions and Actions, as the matter directly focuses on the Content of The Strategy even though the triggered response is through the understanding and perceptions of the environmental and organizational conditions.

The Seven Oaks School Division Met operates as a loosely coupled entity housed within the larger GCC and can be characterized as functioning as a S-W-S that offers a non-traditional

school structure and a non-standard curriculum delivery system. The student population of the MET in the last two academic school years averaged 40 students with three advisors and one principal while GCC is a school of 1300 students with 4 administrators and a teaching staff of 95 people (A. Warren, Personal Communication, August 30, 2011). It is important then to note in terms of the organizational context, the SOSD Met school is an embedded unit within a larger school community. The organizational context of this S-W-S arrangement presents elements of flexibility and constraint with influences operating between each school is the focus of the next section.

According to Howard Kowalchuk, who was a vice principal of GCC, there were no real physical obstacles or insurmountable pressures placed on the building when it was announced that the Met would be housed in GCC (H. Kowalchuk, Interview, March 22, 2011). One of the first things Howard, Steve and Adair looked at was physically how a Met styled school might work in terms of a larger school setting. The identified space requirements of three classrooms (Rooms 301, 302, and 303 – East Building) and administrative space (old counseling area – East Building, main floor) with an area for general office space (to accommodate a ½ time secretary) along with three smaller offices, which included one office for the principal of the Met²⁸ (Appendix U: Schematic Map) were allocated in the east wing of GCC. This occurred at a time the school had enough room to accommodate the space requirements (S. Medwick, Interview, April 19, 2011).

In terms of GCC staffing, the impact was almost negligible as well in that it did not put any new demands on existing staff or resources and the program had no direct bearing on them. The announcement of the opening of the Met school at GCC created a sense of

²⁸ Information obtained by a school visit during interviews by the author.

interest and curiosity in the program for many current GCC students, though I did not sense that it had any further impact on their classrooms or their teachers. In terms of the larger staff of GCC, no demands were placed on them but there was mostly an air of excitement with lots of questions of what the program would look like. (H. Kowalchuk, Interview, March 22, 2011)

In terms of school routine, the SOSD Met operates within the same school year calendar, school day (08:30 am - 3:30 pm except Wednesdays when it is 08:45 am - 2:30 pm), lunch hour (11:35 am - 12:40 pm) as does its host school GCC. The SOSD Met staff and students (SOSD Met, 2010) can access school facilities such as the cafeteria, gym, weight room, and library. In addition to the above facilities identified on the Met Web Site, students have access to the transportation and clinical support services of the division.

The SOSD Met classrooms are self-contained on the second floor in that access to the three classrooms is through an opening in two of the adjacent walls separating the individual classrooms. A colleague, who used to work at GCC, presented the idea to Adair. Adair who liked it, brought it to the SOSD Met staff who believed that it would assist with the movement of advisors and students and the exchange of ideas amongst and between both groups (A. Warren, Interview, March 07, 2011). Washor (2003) describes three tensions when thinking about building design: (1) purposes; (2) innovation vs. tradition; and (3) standard operating procedures vs. adaptation. While Adair readily admitted that while creating the ability to move through the classrooms was initially just an idea, it has been very well received by the students and the advisors (A. Warren, Interview, March 07, 2011). Students either as individuals or in groups remain or move between the three classes depending on the activity or the learning sequence. Typically, on Mondays, Wednesdays and Fridays (Academic Days), students are on site while

Tuesdays and Thursdays (Internship Days) are off site. Program delivery occurs through the student's individual learning plan. Group advisory meetings are held to address specific topics applicable to the group or at times, and as needed, by other members of the Met staff or in specific student situations students.

While the Met is a separate entity as evidenced by its own school structure and has the operational expectations of any other high school in the Province of Manitoba, it has close links with the larger school so that students can benefit from taking such things as PE/HE, band or choir in a timetabled section with GCC students. SOSD Met students have an open invitation to attend GCC school assemblies and they select which ones to attend based on their internship program and if there is a "good fit" in student program (S. Medwick Interview, April 19, 2011). In terms of organizational capacity, Steve, the principal of GCC, believes that he and the staff are quite fortunate that they have three gymnasias so timetabling Met students for PE/HE is achievable. As well with increased flexibility, should a student choose to take the PE/HE credit online, Manitoba Education offers courses through the internet.

Meeting the student-advisor ratio (15:1), as stipulated by the MOU, still allowed for flexibility in terms of meeting individual student program needs and program requirements offered within the larger host site – GCC.

Certainly many institutional structures that define the parameters of a secondary school are tangible in a concrete and readily observable fashion. These include school size, internal organizational structures such as departmentalization, time tabling practice as well as program delivery mechanisms such as streaming and optional courses. The chief organizational feature in the SOSD Met is the implementation of the advisory system where fifteen students are with one

teacher for the four years of their high school program. This feature in itself drives the other organizational elements - how students come together, how the school is administered, and how advisors interact with their advisories, and with each other in a professional collaborative sense.

In terms of prior history, no experience of the magnitude of the change examined in this study had ever occurred within the division. With the expressed intention of developing a sense of the organizational context in which the Met is embedded, the focus of this section will be limited to the experiences of the administrators, Steve, Adair and Howard, through their middle years' experience and then coming to GCC. In terms of the administrative team that came to GCC, the three administrators had acquired experience in creating a variety of different initiatives in the middle years environment, notably through the Industrial Arts programs and in the creation of advisories. They used this prior middle years' experience combined with an interest in kids to talk about individual needs of high school students around the theme "one kid at a time" (S. Medwick Interview, April 19, 2011). In terms of prior strategies, the Met school in Seven Oaks School Division represents a clear break from the traditional structure of a high school in the Province of Manitoba.

In terms of top management characteristics as a variable within the organization context of the model, three individuals are considered: as CEO of Seven Oaks School Division, the Superintendent of Schools, Brian O'Leary; Steve Medwick, Principal of GCC; and Adair Warren, Principal of the Met. The management characteristics of this nested structure are, simply put, supportive. The facilitative nature and the affirming tone of Adair reflect through all interviews with Brian, Steve, and Howard (currently a principal in another school). This support base was grounded years before with Adair, Howard and Steve as administrators of a middle years school. Prior to the development of the MET or even coming to the high school,

conversations were held regarding applying Littky's ideas on the advisory system into a middle years program. As time progressed and the three administrators were at GCC, conversations carried on about what a Met styled school would look like (S. Medwick, Interview, April 19, 2011).

In the early discussion stages Adair, Howard and Steve did not know whether the Met would be a school-within-a-school (S-W-S) or a stand-alone structure. According to Steve, he believed a possible scenario to be that if the division started up a Met school it would be housed in one of the Division's smaller schools. (S. Medwick, Interview, April 19, 2011). What they did not envision properly at the time was the idea that they would possibly need the access to a high school band program, physical education classes, pre-calculus classes, or other facilities. According to Steve as they carried on with further discussions and research, they soon realized Met styled schools operated in different contexts throughout the United States in different configurations, utilizing in many cases, the resources that large schools offered the smaller met schools that were within close proximity (Steve Medwick, Interview, April 19, 2011). The availability of accessing other school programs and resources in larger schools is a feature in a number of other American Met school models (G. Young, Interview, March 23, 2011).

The benefits of a S-W-S structure are fourfold:

- 1) Met students could take specialized courses of interest as the need warranted;
- 2) The four compulsory credits in physical education and health education remained on site, within a different part of the building;
- 3) For parents or students concerned about the new program, it would be easy to drop back into a traditional program in that students were still within the school; and

4) If a student had an interest in band or choir, he/she could continue as a SOSD Met student.

The benefits of an S-W-S structure can be negated by perceptions of elitism which can lead to resentment in Littky's view (Levine, 2002). Littky "believes that [S-W-S] designs should have multiple schools in a single building, not a single school with multiple subdivisions" (Levine, 2002, p. 16). Issues of elitism and resentment are discussed in Muncey and McQuillan's (1996) work on the Coalition of Essential Schools.

Amongst the three (Adair, Howard, and Steve), there is evidence of interest, commitment, and backing for the Met in GCC. An example of this supportive environment within the organizational setting at the host school occurred in the discussions about timetabling between Steve and Adair, once a picture started to form regarding the number of students enrolled and courses requested. For example, if a student wanted a Pre-Calculus Grade 10 Mathematics class or more specifically a compulsory physical education course, attention to timetabling in the larger school would be an important consideration due to the SOSD Met school's weekly structure and the desire to avoid conflicts in student timetables (Steve Medwick, Interview, April 19, 2011).

In terms of planning for 2009-2010 academic year and decisions regarding the number of grade nine sections to have, Steve met with Adair to look at potential numbers going into her program. Based on the numbers going into the Met and the enrollment for grade nine classes in GCC, he was able to look at how many sections to offer in physical education industrial arts, or other optional courses. This is significant in terms of student registration and course loadings. For example, at the grade 9 Woods Program if two sections were full, then there would be room

in a third that might have had to be moved during the building of the timetable that would accommodate Met students. In Steve's words:

So you know having that cohesion while working together eliminates some of what I think are stumbling blocks to having separate buildings and yet allows parents to say "Well, ok, I like your philosophy if this is how you deliver it, but is my kid still going to be able to take this and this and this?" (S. Medwick Interview, April 19, 2011)

This open and supportive relationship is important to both SOSD Met and GCC as the SOSD Met is increasing its enrollment by one advisory and one staff member in the 2010-2011 academic year. This information will affect not only the physical structure of the SOSD Met but also space accommodations in GCC (A. Warren, Personal Communication, July 12, 2011). This occurs at a time when GCC's enrolment is increasing and putting some pressure on the physical space of the building (S. Medwick Interview, April 19, 2011).

A school, like other formal organizations, must deal with the tasks of structuring, managing, and giving direction to a complex mix of human and material resources. However, unlike other formal organizations, the school has a non-economic output that gives rise to a unique problem of managerial control. On one hand, learning requirements suggest an environment that is not prescriptive or encumbered while on the other hand, requirements of efficiency and predictability in the management of the school requires more of a rational programmed environment. Bidwell (as cited in Hanson, 2003) comments on this organizational tension:

The looseness of system structures and the nature of the teaching task seem to press for a professional motive school system organization, while demands for uniformity of product

and the long time span over which cohorts of students are trained, pressed for rationalization of activities and thus for a bureaucratic base of organization. (p. 70)

The organizational tension outlined above by Bidwell to a great extent has been alleviated not only through the flexibility of individualized planning afforded by the Met structure and accommodations within the host site –GCC but crucially though the Academic Plan and monitoring system²⁹ employed by the Met staff.

The organizational tensions are identified in Table 4.2.

Table 4.2

Environmental and Organizational Tensions on the SOSD Met

Context	Goals	Constraints on Collective Leadership Group
Environment		
BPL	Personalization	BPL Design
MB. Ed.	Outcomes Based education	GLOs & SLOs of courses
Organization		
SOSD	Increase Graduation Rates	Financial
GCC	Support S-W-S	Physical Space

In the face of these goals and constraints, as an analyst, I can identify at least four options available to the CLG. I state them in a non-prioritized list:

²⁹ The monitoring system used by SOSD Met is the Comprehensive Information Management System (CIMS) that is the GCC student record keeping system.

Choice 1. Abandon Met design and create their own program while relying solely on provincial GLOs & SLOs.

Choice 2. Disband the CLG and maintain the status quo.

Choice 3. Develop a change in the content of the strategy that meets the goals of BPL and Manitoba Education.

Choice 4. Partially implement the BPL Design while meeting GLOs and SLOs. Increase direct teaching in the program and reduce the degree of personalization.

As the CLG selected Choice 3 over the other alternatives, it presents as the one best to meet the goals and constraints of the four organizations/institutions in the matrix. It was the most rational for the group, and from my perspective as an analyst, it was the most rational choice to achieve a Met-inspired school in SOSD.

Summary

This completes the findings related to the first research question with respect to a rational lens perspective. In summary, the tension in the environment and organization between BPL learning goals and Manitoba Education outcomes (GLOs & SLOs) forced the form of the content of the strategy to be comprised of two components. Firstly, the five Met distinguishers (Advisory System, LTI, Personalization, Family Involvement, and Authentic Assessment) that emerged through the work of the CLG that addressed the technical core of the school established the SOSD Met as a Met-inspired school.

The second task of aligning the requirements of both organizations required knowledge of the BPL learning goals, Manitoba Education outcomes, and a working understanding of the

Met Philosophy. While documents from Manitoba Education and information from BPL were relied on to create a blueprint called the Academic Plan, the belief was held by those members of the CLG interviewed, that achieving a perfect plan could not be implemented as the plan would be driven by student need. Herein lays a paradox, while the Academic Plan was needed by the CLG to implement the SOSD Met school, the thinking around it was in immediate terms and goals, while in the future tense, the group was open to contingencies, some of which were anticipated while others would have been unknown. The experience gained through their visitations and PD sessions with their mentor would have provided the necessary framework to operate in with the understanding that a Met styled program might not work for all.

The educational design of the SOSD Met was a rational choice on the part of the CLG because it satisfied the goals and constraints of the four institutions/organizations that were important to its continued existence. The design would be a radically different approach to secondary education, which was in keeping with SOSD's desire to be an innovative leader in education in Manitoba. Further, it seemed to have the potential to increase graduation rates of the division's secondary school students. It could be done in ways that did not put excessive burden on GCC and it offered students access to many of that school's services and faculties. It satisfied the conditions from BPL and so it could be labeled as a BPL school, and its program satisfied the goals and constraints of the provincial department of education who wanted to ensure that students met the GLOs and SLOs of secondary school courses.

Chapter 5

Findings to Research Question II: A Cognitive and Learning Lens Perspective on the Decisions of the Collective Leadership Group

Few, if any, strategies can be purely deliberative, and few can be purely emergent. One suggests no learning, the other no control.

- Mintzberg, 1994 (cited in Fullan 2007, p. 107)

Introduction

This chapter presents the findings of this study's second question: *Is this particular version of the content of the strategy the result of the interaction of the cognitions and actions of the Collective Leadership Group and their interpretation of the goals and constraints posed by the organization and environment?* Because this question yielded a substantial amount of information, the chapter is subdivided into two sections. The first section titled Principal, Advisor and Collective Leadership Group (CLG) Cognition is broken into two parts. The first part, a detailed section on principal cognition, is followed by a second part on advisor and collective leadership group cognition. The second is titled Principal, Advisor and Collective Leadership Group Actions and like the first section is divided into two parts related to the individual and collective actions of the members of the CLG. This chapter will demonstrate that the specific features of the SOSD Met school were very much affected by the thinking, values, and activities of the different individuals who comprised the leadership group.

Principal, Advisor and Collective Leadership Group Cognition

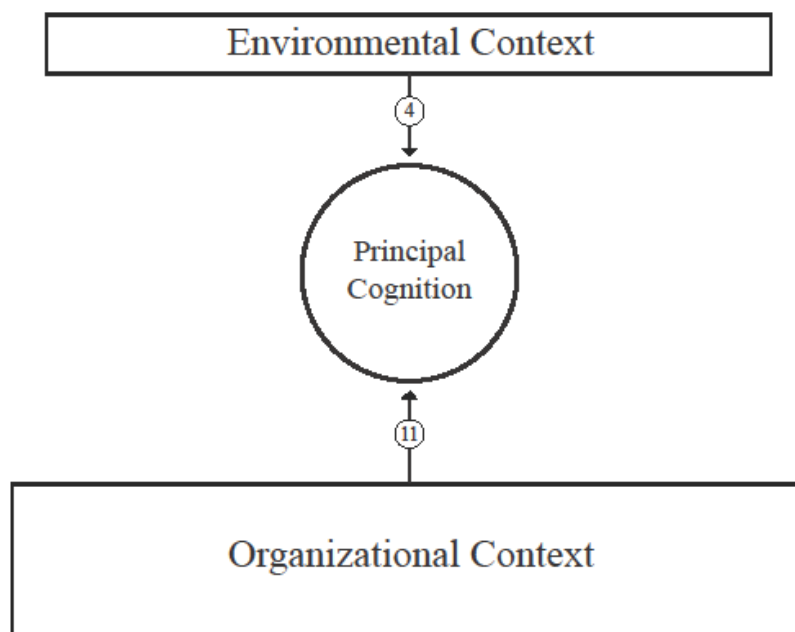
Principal Cognition

Walsh (1995) identified four components that operationalize managerial cognition: knowledge structures, core beliefs, causal maps, and schemas. Managerial cognitions are the

interpretive processes that are used by managers to frame the circumstances in which they find themselves. These circumstances are contextualized through one's interpretation and interaction with the environment and the organization within which one is situated. In a school environment that is undergoing a shift in knowledge structures as in the creation of the SOSD Met, the change process can be viewed as transformational (Rajagopalan & Spreitzer, 1997). A key assumption addressed by the cognitive lens perspective is that the environment cannot be objectively determined by rational means alone but is enacted by administrators and represented (Figure 5.1) through cognitions (Link 5) which form the basis for principal action (Links 6, 7, & 8) (Rajagopalan & Spreitzer, 1997).

Figure 5.1

Relationship Between Environmental and Organizational Contexts and Principal Cognition



The organizational structures, rules, procedures, and protocols form part of the organizational ideology by which administrative cognitions of the need for, and resistance to, change are embedded (Link 11) (Rajagopalan & Spreitzer, 1997). The effect of these cognitions (Figure 2.2, p. 42) is only apparent when manifested (Links 6, 7, 8, & 9).

The lack of unity between the requirements of Manitoba Education and the signed MOU between BPL and SOSD decidedly called for a response, which reflects a critical feature of reality facing school administrators, namely that content strategy changes must address the expectations and requirements of a high school's environmental and organizational contexts (Rajagopalan and Spreitzer, 1997). In the rational lens perspective, changes in the content of the strategy are linked (Link 1) to the environment and to the organizational conditions (Link 2). The adoption of the cognitive and learning lens in the model provides insight into the thinking and acting of the members of the CLG.

Cognitions form one's espoused theory while the enactment is one's theory-in-use for action (Argyris, 1999). The enactment or action by the administrator who seeks to create a shared need for change provides feedback to the staff that in turn may alter knowledge structures (Link 8). As theorized in the AR-S Model, administrator actions as diagramed in Figure 2.2 (p. 42) can influence stakeholders in the environment (Link 6), organizational structures and systems (Link 7), staff (Links 8a, 8b, & 8c) and changes in the content of the strategy (Link 8). This section of the chapter addresses the principal's cognition, individual advisor cognition, and distributed cognitions attributed to the collective leadership group (CLG).

Adair's appointment as Met Coordinator occurred in February 2009. She recalled her thoughts at that time –

. . . my recollection . . . literally in one day from that decision firstly being made, secondarily being announced, that one day I was Vice Principal at Garden City Collegiate, and the next, I was Met school Coordinator with the job of getting this project up and running. I was no longer technically Vice Principal at Garden City, even though I certainly had a vice principal connection in terms of the school and the people, but my office changed – I moved from the main pod of offices into next door here. You know, it was quite an interesting shift; in January, your life is unfolding one way and then in February, it is unfolding a different way. (A. Warren, Interview, March 7, 2011)

In application of Walsh's (1995) managerial cognition perspective to the principal, it would appear that Adair's experiences in the middle years environment formed part of the mental template that provided for the processing of new information necessary to create the SOSD Met. When asked to recount her experience in developing the SOSD Met school, Adair spoke quite clearly about how her administrative middle years' experience played a strong force in consolidating the fit with Littky's work at the high school. Part of Adair's understanding of the Met concept had been shaped through her reading and discussions of the school concept with her administrative colleagues – Steve and Howard and as an administrator at a middle year's school and recently at GCC. Coupled with these actions, Adair's visit to The Met Center of Providence and Newport, Rhode Island and the Met advisor sessions solidified her knowledge and understanding of the conceptual underpinnings of the program. Her reflections of the trip are as follows:

During my visit with other colleagues from SOSD in January 2009, we saw the Met campus. I went into that trip interested in what Met schools were all about - understanding the philosophy, knowing about the school, and my previous reading and

research made it even more fascinating. It was great to experience the school first hand and witness their student exhibitions. (A. Warren, Interview, March 7, 2011)

She had some prior experience with flexible grouping and drew on her knowledge of multiage classrooms to dream what a Met school would look like within the SOSD context. In practice, she saw planning for instruction as planning for individuals as demonstrated by this excerpt:

Well, it depends on whether you see it as planning as what you and I probably know about education. No matter how those children are labeled, they are all at their own place in terms of their academics and social abilities and functioning, so I do not believe that we entered into it with the understanding that we had two groups to plan for. We entered into it with the understanding that we had 40 ...— based on students' actual needs, our perspective was that we had two multi-age classrooms and we needed to address the curriculum. The strength of this structure is that we did lots of flexible grouping. Therefore, you as a teacher might take a Grade Nine Math for a couple of units, I would take grade ten mathematics for a couple of units, and then all of a sudden you are planning one grade again. . . . We did many of those kinds of things. I would say the essence of the program is at the level of one student; so yes there are complexities of having multi-age classrooms³⁰. It seems to be well understood in the early and middle years side of it. I think we have grown into an understanding of that as educators, and I believe that we have established and grown to that as a Met school in terms of now

³⁰ In a SOSD Met advisory, the age range can be more diverse than a typical high school class, as students are in three different grade levels within the advisory in 2011-2012.

currently having two multi-grade classrooms and one straight Grade Ten. (A. Warren, Interview, March 7, 2011)

In reflecting on the challenges that she found during the process of developing the SOSD Met Adair responded with these thoughts:

Some of the challenges were around our sense of the structure - what happens during the day? What will the academic plan look like and how will it flow through the year? ... How do we make sense of that? How do we develop projects? Very practical things, like what will our teaching practice look like, both individually and collectively? I would say that those were strong challenges, which we were able to overcome. [A second challenge] There is always a challenge of learning how to work together. Knowing you start from not knowing someone and in the process I would say that this is the challenge of bringing people together. I see these things as the nature of the job, the reality, and that is why in offering the job [to the others] I said that "this is different, give some thought to what it means for the next little bit". At that point, when the jobs were offered, we did not know that we would be hiring them on in a full-time development role in May. That evolved in response to recognizing that there is a lot of work to complete and that was a shared piece of work. (A. Warren, Interview, March 7, 2011)

She goes on to describe the challenge of adopting an American developed model within the context of Manitoba and the world of middle-years students:

I think during that process, it was the reality of making sense of what had been primarily a U.S. based model and to bring that into a meaningful context and to understand what that meant for curriculum expectations and assessment, to be well informed about middle

years students and what they are coming in with. One of the things that I did feel comfortable with was talking with Grade 8 students about this opportunity. The world of middle years is a world that I know really well and I think that to be able to speak to them from a place of understanding about their school experience, generally as a middle-years student, was important. . . . There was considerable learning, in the sense that this job stepped outside of the boundaries of a typical high school. (A. Warren, Interview, March 7, 2011)

While some facets of planning for opening day of the SOSD Met were routine for any high school administration team preparing for a new academic year – open houses, information sessions, registration procedures and the development of a web site, there was still a number of challenges. Whether it involved information sessions, meetings, or logistics, they all demanded Adair's attention and planning.

These are my thinking notes. . . . It was important for me to develop a strategy, a plan, to understand from a calendar point of view, and what needed to get accomplished by when. . . . I am booked at Leila North [middle years school] on this day, I had a PD day, we hosted an information session for staff at Seven Oaks Board Office and Elliott Washor and Greg Young were there . . . a middle years PAC Meeting, I did a Garden City PAC meeting, I did an information session at Admin Council. (A. Warren, Interview, March 7, 2011)

The second factor identified by Walsh (1995) is the core belief system of the manager. In this, Adair believed that change was a constant part of her life as reflected in her childhood memories through to her teaching and then administrative assignments.

. . . This is a personal reflection. Goodness knows by the time I was in Grade Seven, I was in my seventh school . . . and as I continued into adulthood . . . change was a constant part of my youth. A reality of that, there were often times where we would end school in June expecting to be back at the school and we would move very quickly in July. . . . That is the way the world worked in my mind and, in fact, I actually thought it worked that way for many people. It was about Grade 8 when I realized that not every one picks up and leaves. . . . I really reflected on the sense that the history of my personal life is one of change. . . . from my earliest recollection as a family member and as a student. So even if there was a moment of “Oh my goodness, can I do this?” I really sat myself down and I said, “This is just what you have done, this is just another example of the change that has always been a part of your life”. I really believe that those early experiences as a child in our family and the school experiences that I had, has created an understanding of impermanence. (A. Warren, Interview, March 7, 2011)

Other tenets of the Met philosophy resonated with her as well – the keys to building a strong family support base on which to build success was important – “I think the learning is around how we engage families and this is what we pay the most attention to. What is most important is to build strong families and then build in lots of opportunity for academic success – how do you do that time over time?” (A. Warren, Interview, March 7, 2011).

Further, establishing a Met in SOSD represented an alignment in her professional life, as to her philosophy of teaching young people, along with the sense of wonderment that drove her own learning. Adair made these observations:

The Met school experience became part of my strength in trying to develop this project. I would say it is relevant to my professional life as a teacher. I also realized that although I did not know everything I needed to know about the Met school on day one, I still had a lot of learning to do and that was a part of the job as well. My focus was to develop a very strong sense of the Met philosophy and do that within a context of high school education in Manitoba. Therefore, it was always a movement between school philosophies, which I felt I knew well. Certainly, I read the book [*The Big Picture: Education is Everybody's Business*] many times and there is also a book by Elliott Levine, *One Kid at a Time*. . . . Therefore, the job was clear - the Met school was opening in September 2009 and it was up to me to figure out what had to happen for that to take place and to position things so that this could actually make sense. Registering students and parents, informing Garden City staff, but also how could this make sense? (A. Warren, Interview, March 7, 2011)

The need to dream, as depicted in the following quote, which interacted with the influences of the normal and pragmatic, as portrayed in the second quote, created the information environments through which one's schema is applied in decision making and goal setting within a thought out plan that was strategic.

Nevertheless, if you have an understanding of what a Met school is, which we did, then it is just a matter of the dream. . . I did not come into it saying an advisory has to look like this and feel like this. We made intentional furniture decisions that have created certain possibilities in the classroom that if we had gone with 15 single desks it would be a different space upstairs, but you have been upstairs so...we made intentional decisions around the kind of day we wanted students to experience. It is all a decision making

process – you don't just take the concept of advisory, press a button and it just happens, you have to plan for it. (A. Warren, Interview, March 7, 2011)

The challenge while daunting to some was lessened with the realization that she was the one who was responsible for getting the school ready for opening in September 2009.

Well, I mean I wonder about lots of things in the future because I think part of being, what sets us apart as human beings, is we do think ahead, we do imagine. So of course I thought ahead and imagined not by, “crossing my fingers, gee I hope this works” kinds of ways. I would say that the decision was made in confidence and I believe that things evolve in unexpected ways. I do not spend a lot of time worrying about worst-case scenarios. I typically believe they do not happen anyway, we just think they do. (A. Warren, Interview, March 7, 2011)

When it came to staffing the SOSD Met, Adair found the process “really interesting and exciting” (A. Warren, Interview, April 19, 2011). The process of staffing started before the jobs were officially posted. Individuals would informally call or drop by to see her to introduce themselves as potentially an interested party or simply to obtain information about the Met School. The result of the March posting generated over sixty-seven applicants with the majority being on-line (A. Warren, Interview, April 19, 2011). From the initial list, Adair narrowed the field of applicants to twenty-four candidates and she interviewed and completed the accompanying three reference checks on all candidates (A. Warren, March 7, 2011). The mental processing that preceded the act of hiring the right candidate for the job was critical. In order to be certain in her own mind, a second interview with the intention of determining the content and structure or schema for the ideal job candidates as imagined by Adair was arranged. While Adair

completed all the interviews personally, she received assistance on several occasions in joint sessions with Brian O’Leary or one of the assistant superintendents in the Division (A. Warren, Interview, April 19, 2011). Adair adopted a ‘holistic’ view to each resumé with the intention of determining what the candidates had to say personally about themselves and how they conveyed their message.

Her response to my question with regard to what type of individual she was looking for is partially contained in the following response:

Obviously, being a formally trained teacher was important. In the case of recently graduated and certified teachers, I wondered what their student teaching experience had been like. What would they provide in terms of references or supporting documentation? . . . Part of the point of interviewing so many was to make the person contact. . . . I rejected some because they did not provide a resume; they did not provide adequate information. Some applications were incomplete or had errors in spelling. For example, when there was a systemic kind of lack-of-care that seemed to have gone into the application, while I had assumed that one would present with the best foot forward, if that was the best foot, then I was looking somewhere else. (A. Warren, Interview, April 19, 2011)

In a more specific response to general criteria, Adair responded with these comments:

Yes, it did matter what their subject specialty was. For example, I may have had some applications from someone like a band teacher . . . I was looking more for people whose background would allow them to contribute to the core high school curricula rather than individuals who are overly specialized. (A. Warren, Interview, April 19, 2011)

When asked if there was an overriding element in the selection criteria, her initial response was whimsical followed by a detailed account:

Competence, brilliance, I am not sure . . . An “interesting person,” one who connects with team members, students, families, and mentors, one who could juggle the demands of the job . . . we were not hiring for a three period teaching load a day high school course. I mean the question of, “How do you do this in a very specific curricular way?” Needed to be broader, because beyond their subject expertise, I had to get a sense of their view of teaching. That in the end[their view of teaching] is going to bring a Science teacher more strongly in the world of being able to become an English teacher as well and a Math teacher and an Art teacher . . . Of course, questions were Met school specific partly around the flexibility of the schedule. These people had to be able to imagine being a high school teacher without an 80-minute timetable. “What do you do with that as a teacher? . . . I say that my middle years’ experience is really helpful because often what a middle years teacher has to do is schedule activities for a full day rather than simply for a period, and during that time, she has to integrate the demands of different curricula. (A. Warren, Interview, April 19, 2011)

Throughout each interview, Adair wanted to probe a candidate’s philosophy of education, his/her ability to develop educational relationships with high school students (in grades 9 and 10), his/her ability to carry on a conversation, and the candidate’s responses to behavioural directed questions regarding classroom disruptions (A. Warren, Interview, April 19, 2011).

With the candidate pool narrowed to eleven and after having one of the assistant superintendents or Brian sit in on some of the interviews, follow up conversations occurred as to how three decisions would be reached.

We were in the kind of situation that you want to be in. Jobs for three and you would be happy with any one of the eleven short-listed. That is a good thing! The hard part was “How do you get to a determination of three?” . . . There are some formalized ways of thinking about it and I really do believe in being strategic and . . . systematic in terms of an approach. I also believe in intuition and things that are harder to pin down but very important to reflect on. I think that the concept of judgment is really the key here in two respects, firstly how you make sense of it all and secondly, how you decide what matters. (A. Warren, Interview, April 19, 2011).

At the time of our second interview, it appeared that the SOSD Met would be increasing its enrolment by another advisory with one advisor for September 2011. In anticipation of the job posting, I asked if Adair anticipated a revised job posting. The following was her response:

I would say that it would change fundamentally because our understanding of the position has changed. Whether we understand it [the job description] as re-vamped, or a new generation of the posting, or a tweaking, I have not gone back to look at it yet. It is on my list of things to do. Nevertheless, I would say yes, our collective understanding of what this job is has evolved also. . . . Then, the original job posting was in consultation with Brian O’Leary and the Personnel Superintendent. This time, I would like to include members of the CLG to collaborate on the formulation of the job description. (A. Warren, Interview, April 19, 2011)

Every organization, regardless of its internal structures, is made up of different people with different skills and knowledge structures doing a variety of work (Drucker, 2008). A central component of the organization is built through communication as in the case of the SOSD Met

(amongst the GCC staff, administration, students, parents, government officials, superintendent, and SOSD Met applicants for the advisor positions) through the practice of sound management. Throughout the process of development, Adair spent considerable time building support for the SOSD Met.

One of the things that I believe is that the key is through communication . . . that many, many misunderstandings are a result of poor communication. Many missed opportunities are reflective of forgotten or displaced conversations. It was my job to create understanding of the opportunity. “Why would you choose a Met school, why might you be interested, how do we do this?” These were some very fundamental questions and I very quickly developed a brochure that reflected a snapshot of the Met school, posters for open houses, and parent information booklets. (A. Warren, Interview, April 19, 2011)

Parents wanted to know about the program so that they could make an informed decision if the program was something from which their child would benefit. Students had questions about the program; what did the day look like, how would credits be obtained and others that reflected personal program concerns. The staff of GCC had questions about what the program would involve and what impact it may have on the larger school. In this regard, Adair, in the view of the principal for GCC, did an excellent job in conveying to the GCC staff the development and continuing activities of the SOSD Met (S. Medwick, Interview, April 19, 2011).

A key awareness developed two weeks after the hiring of the three advisors, which paved the way for the decision to assign two advisors full time to develop the program.

Brian knew we were going to Sacramento or he knew there was a PD opportunity and Sacramento emerged as the best match for our school context here. What I believe is that in discussing the reality of opening in September, Brian suggested assigning two of the staff full time for May and June; obviously, it was with his assent that staff members were hired and deployed. The superintendent recognized that there were many inherent challenges in this that are different and distinct from hiring a grade ten-science teacher for Garden City. This is a different endeavor and there is a necessity to come together around it. (A. Warren, Interview, April 19, 2011)

This occurred in a rather short time frame as the advisors were offered the positions around the third week in April and on May 12 was the scheduled trip to Sacramento to visit the Met Sacramento school in its first year of operation. At this time, Adair was putting in 10-12 hour days and welcomed the advisors who took on a significant piece of the work load [the alignment of the Manitoba Education standards with BPL goals] (A. Warren, Interview, March 7, 2011).

I mean this was a hard job. I saw the trip as a great opportunity and I really appreciated the support of the division to bring on something like this for us. It was together, first as a staff of four people, who did not really know the Met. I saw that aside from my having met with each of them, they had not met each other and that was really somewhat intriguing. That would have been probably late April and that was the beginning of what evolved into a meaningful, purposeful, positive and supportive staff relationship. It was a really interesting way to welcome staff because normally as an administrator you hire staff and welcome them into something, whereas the world that we all came at together

was ‘okay, what do we have to do for the next few months? (Adair Warren, Interview, March 7, 2011)

To keep the process moving and to avoid becoming mired in detail overload, Adair relied extensively on large flip chart sheets where she created a task – calendar matrix. These visual charts [Gantt³¹] established a clear ordering of tasks within a period for completion. Her planning supplemented with a “day planner” that had two-pages per day. One side was her “to do” list (tasks, calls, meetings, presentations, ordering materials etc.) while the other page was called her “thoughts page.”

An early decision by Brian, as reflected in the SOSD Draft Big Picture Schools Support Plan (The Proposal, September 8, 2010), created the flexibility to implement grades 9 through 11³² with three advisors, which allowed for a projected enrolment of no more than 12 -15 students per advisory and a staff of four – three advisors and an administrator.

We could have opened with two teachers and thirty kids or three teachers and forty-five, which were the two options that we considered. We originally thought that we would grow it to 120 kids within three years but it will take longer than that. We had three teachers last year and we will add one this year. We are seeing it maxing out at 120 kids. As for the present location, at the time that we started it we did not have the [increased] enrolment pressure that we have now at GCC. (B. O’Leary, Interview, May 4, 2011)

Adair’s view on planning is pragmatic – “we create the plan and that is what we live by” (A. Warren, Interview, March 7, 2011). Clearly, there was no inertia similar to that

³¹ A diagram on which activities or tasks are labeled vertically and the time required to complete them is shown horizontally.

³² This information was specifically written in The Proposal (Fall, 2010) for services. The intention was to have an intake of students across grades 9-11 in the first year of the program.

accompanying a typical high school staff's preparation for a fall term. The momentum had to originate with the principal as the rest of the SOSD Met staff members were adapting and creating a plan that suited their circumstances. It was the principal's job to get it going (A. Warren, Interview, March 7, 2011). The period placed on this project was clear, relatively short, with a number of critical points – the timely dissemination of information, appropriate forms made ready, speaking notes for presentations and web site developed. Target was the opening of school in September, “my job was to figure out what had to happen for that to take place and to position things so that this could actually make sense” (A. Warren, Interview, March 7, 2011).

Thinking about how to have the school ready was part of an evolving conversation for much of the work.

I would describe [the process of getting ready for school opening] as evolving conversations around what is the mandate, what is the scope of the initiative, and I would say that the direction I did not hear explicitly but implied, is how to make it work. There was not a lot of “do this, don't do that” kind of direction – there was certainly a lot of guidance and some early communication, when I developed a brochure³³; it was Brian that I ran it by. He had good feedback. When I was tagging along at the open house and developing a registration meeting, Brian would have been well informed. I was open with him that this is a new endeavour for me, so “please as I am taking a step if it is not the right step; just let me know where I may want to go with this.” (A. Warren, Interview, March 7, 2011)

There was a time when solitude was necessary in order to get the work completed.

³³ An example of the type of brochure developed is in Appendix V.

That was an interesting point of view, a change from high school administration to developing something new. Certainly, the first few months felt and were, I think by reality and necessity, somewhat solitary and I do not mean this in a negative way. It was clearly on my shoulders and it was certainly interesting to watch it evolve to the point where we had staff hired in April (the three advisors). It was interesting to have gone through a process of day-to-day practical planning and thinking about how to tell a story of the Met school that could be understood to then moving and becoming a part of the team. That I would say is a very interesting process [moving from an individual situation to that of a group]. (A. Warren, Interview, March 7, 2011)

The process for Adair involved part observation and part imagination. Decisions were intentional and reflected a clear vision “I have learned to have a clear vision and to always come back to what the purpose of why we are here and to be really mindful of where to push real hard” (A. Warren, Interview March 7, 2011). Being mindful of the Met philosophy along with the reality of the connectedness to GCC by SOSD Met students with clubs, sports, and friends informed Adair’s mental picture of how her students interacted. “We exist within and part of our reality is supporting our students in that context because there is an incredible link” (A. Warren, Interview, March 7, 2011).

Summary of Principal Cognition

This completes the findings attributed to principal cognition as theorized in the AR-S model. In summary, Adair’s previous life and professional experiences developed a mind set for the type of challenges and unknowns faced when implementing a new orientation that reflected a different set of strategies for a high school. While many of the decisions conformed to a typical

set for any high school opening based on her previous high school administrative experience, she was alone for over half of the time in creating the momentum to develop the SOSD Met. Her awareness of environmental and organizational contexts shaped her decisions. Her view was that decisions needed to reflect the pragmatic and practical realities of the task – creating the SOSD Met. An example, derived through one of our conversations, would be her awareness of the balance between generating interest in the program but not to the point where potential registrants would be denied access to the program because of over-subscription. Secondly, her conceptualization of the attributes required by advisors is important. Two key attributes of the successful interviewees appear to be their educational philosophy and the orientation toward students. Interviewees who came across as subject oriented would do less favorably than those who saw the student at the center of the enterprise. How Adair addressed the temporal aspects of goals and actions, time constraints imposed on decision-making and her value system as she moved from the known to the unknown influenced her mental model of the job. In the end, the quality of her actions would be a function of her ability to shift from the decision-making mindset needed for goal choice to the mindset needed for implementation.

In terms of the cognitive lens perspective on strategic change, the cognitions are linked clearly to principal actions (Link 5) with a direct link to the changes in the Content of the Strategy. The placement of the principal in the model adheres to the implicit assumption in the cognitive lens perspective that the environment cannot be objectively determined; “instead, it is enacted by managers and represented through cognitions” (Rajagopalan and Spreitzer, 1996, p. 62) (Link 12). It is through the environmental (Link 4) and organizational (Link 11) contexts that provide sources of information that affects the content and structure of individual cognition.

Based on these information environments, cognitions would have little effect on changes in the content of the strategy if they were not manifested as actions (Link 8).

According to Rajagopalan and Spreitzer (1996) changes in the content of the strategy (Link 3) are directly linked to organizational belief structures and combine with principal actions (Link 10) to produce enduring changes in the organizational belief structures that emerge.

Advisor and Collective Leadership Group Cognition

The practice of [school administration] management is fundamentally a social activity (Walsh, 1995). The study of the information environment and its organizational consequences allows for interpretation and action by the actors in those contexts. These processes of obtaining information, processing it, and then choosing to act or not, are now considered at the individual (advisor) and group (collective leadership group) levels in the organization (SOSD Met).

Adair in the following excerpt describes how the CLG developed their sense of priorities in the face of a multitude of competing tasks and ideas.

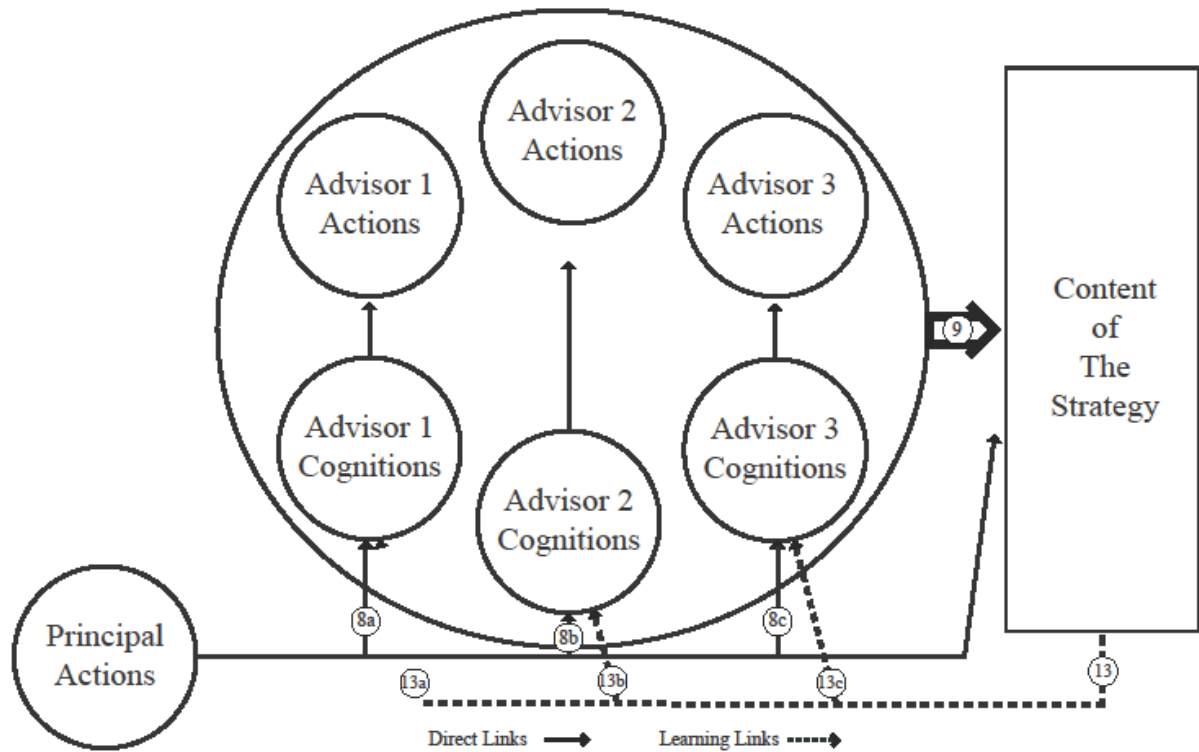
There is an understanding of the relationship when adults work. If we try to point at all the factors that influence our thinking or that guided us, there were some very normal, pragmatic pieces. Then there is the part that tells you what that one star is. When we orient ourselves to something, we know of the something because there is other stuff out there. (A. Warren, Interview, March 7, 2011)

The role of principal and advisor cognition relates to the cognitive restructuring Schein (2004) describes once an organization has been unfrozen in Lewin's conception of organizational change.

Once the organization has been unfrozen, the change process proceeds along a number of different lines that reflect either new learning through trial and error based on scanning the environment broadly, or imitation of role models, based on psychological identification with the role model. In either case, the essence of the new learning is usually some cognitive redefinition of some of the core concepts in the assumption set . . . this process is more than rationalization. It is a genuine cognitive redefinition on the part of [the members] of the organization and viewed ultimately as “restructuring.” (Schein, 2004, p. 325)

Drawing on the work of cognitive psychologists, Walsh (1995) claims that individuals process information in one of two ways. They can use a “top down” approach whereby their past experiences and similar circumstances guide present information processing, or a “theory driven” approach where they can let the current information context guide information processing in a “bottom up” or “data driven” fashion. “In the former case the cognitive structures generated from experience affect individuals’ abilities to encode and make inferences about new information; in the latter case, information itself shapes individuals responses to it” (Walsh, 1995, p. 281). The graphic representation of the Adapted R-S Model (AR-S Model) (Figure 2.2) portrays the theorized link of between advisor cognition and action. Figure 5.2 presents the link between advisor cognition and action. For the purpose of this study, advisors are used as an organizing framework to visualize the theorized role of cognition in individuals who form part of the collective leadership group (A1C; A2C; A3C) at the organizational level and its manifestation in the changes of the content of the strategy (Link 9).

Figure 5.2
Relationship Between Advisor Cognitions and Actions with Principal Actions
on the Content of the Strategy



At the individual level of analysis, individuals are the SOSD Met advisors while at the group level, the three advisors and the principal together comprise the collective leadership group and as will be shown, function at times as a tightly coupled structure and at other times a loosely coupled structure dictated by virtue of role demands.

The purpose of this section of the chapter is first to understand the interplay between individual and group level cognition and secondly to report on the importance of social organization of distributed cognition within the Met structure. “While BP Schools have a markedly different structure than other high schools” (SOSD, MOU, 2009) the principal’s responsibilities remain as those outlined in Part V of Manitoba Regulation 468/88 made under

the authority of The Education Administration Act of Manitoba (Special Schools Set, Vol.1, 1997). The core organizational structure is the advisory system through which the advisor as described in Chapter 1 is responsible for managing each of his or her advisory student's Learning Through Interest (LTI) and learning plan. "The day-to-day operation of the school, its management, the implementation of the curriculum, and generally student success, are responsibilities of advisors" (SOSD, MOU-Attachment A, 2009). This organizational structure implies a flatter set of organizational relationships; the structure is not completely heterarchical as there is a clear hierarchical structure when it comes to administrative decision making as indicated in the following excerpt:

Yes, there were times when we had a discussion – I remember saying we can have a good discussion on this and it would be valuable, but in the end, we are doing this way. . . . I think that there is value in terms of discussion . . . that was a place as an administrator, that I knew we are doing this and going here. . . . I think comes from an understanding of what is the role of administration and taking very seriously the fact that there is a responsibility to sometimes say we are going this way (Adair Warren, Interview, March 5, 2011).

This section of the chapter locates the collective leadership group at the operational core of the school where its members are intensely involved in the day-to-day activities required to implement goals and strategies to meet expectations from the environment - Manitoba Education and BPL and those from the organizational context – SOSD and GCC. What comes forward from the interviews, removed from the instrumental nature of most prescriptions of change management and what change agents should do to implement a strategy, is more about the interpersonal, relational, and symbolic aspects of their roles. The following narratives from two

of the three SOSD Met advisors, who agreed to participate in the study, develops the theorized inclusion of the advisors as part of the collective leadership group that extends the leadership role of the principal/manager as portrayed in management literature.

Teacher A, one of the SOSD Met advisors, was aware of Littky's book and its theme of "one child at a time" from having attended past professional development activities. The teacher's interest was piqued upon learning that a teacher advisor and some students were visiting Seven Oaks School Division from the Met Center in Providence, Rhode Island. After some considerable thought, Teacher A decided to give Adair a call and see if applications were still being accepted. This action ultimately led to Teacher A's new assignment in the SOSD Met.

When asked to recall the process of creating the SOSD Met, Teacher A described it as collaborative, particularly in the time following the staff visitation of the Met Sacramento school. When thinking about the SOSD Met school, Teacher A was drawn to the flexible dynamic structure offered by the program. Further, Teacher A was drawn to the forward thinking that situated students at the center of the enterprise. Finally, this presented Teacher A with an opportunity to work with a group of students in a rather exciting way that resonated with personal beliefs about education (Teacher A, Interview, April 19, 2011). The Met philosophy reaffirmed much of Teacher A's own ideas in the sense of focusing on student interest, parent involvement, and the concept of the advisory, and it certainly resonated with Teacher A's professional development experience and work with authentic assessment (Teacher A, Interview, April 19, 2011). While some of Teacher A's past experiences sat comfortably with a novel approach to programming, moving towards a SOSD Met would require considerable reframing and learning. To this extent, much of the pressure to help create the Met was self-imposed.

I can imagine there was certain pressure, not directly from the Board Office; they have always been super supportive. Trustees, superintendents, team, everyone has been really supportive, but we knew ourselves to be are taking a risk; we knew that the division is making an investment in this – we wanted them to be proud. (Teacher A, Interview, April 19, 2011)

For Teacher A then, there was a strong interest and the strong desire to focus on the kids' interests and embrace change, which proved to be highly motivating and exciting.

Teacher B was interested in alternative education and alternate forms of delivery. These interests drove a passion for change and education. Teacher B wanted to be a part of something different and was prepared to make a change (Teacher B, Interview, April 19, 2011). .

Teacher B had heard of the Providence Met school and Big Picture Learning but had not really delved into the topic to any great depth (Teacher B, Interview, April 19, 2011). Assigned to create a plan in the months of May and June, Teacher B saw it “as a great opportunity and to work through what it meant to bring Big Picture Learning into a Manitoba context and find common ground with Manitoba Education” (Teacher B, Interview, April 19, 2011).

Three core beliefs emerged from the interviews of the two advisors in the study. Firstly, they valued challenging work that allowed them to follow their passions. Secondly the building of relationships whether it be with other staff members, students, parents or the organization, was important not only to the tenets of BPL but also and significantly to the creation of a harmonious work environment that espouses trust and collaboration as important characteristics. Thirdly, the idea of embracing the philosophy of “one student at a time” and accepting change as a constant were attributes shared by the group (G. Young, Interview, March 23, 2011).

Teacher A as well stressed the collaborative nature of the four individuals working as the SOSD Met school:

It was a very collaborative process, where the four of us came together. Initially we went to Sacramento . . . we were just there to go and observe – we had already, all of us, had been reading about Met before and I think it was more team building . . . how can we work together to make this happen? (Teacher A, Interview, April 19, 2011)

As well, Teacher A referred to the experience as being an excellent opportunity to get to know each other very well.

I think that at the end of the trip we were all thrilled because we got along really well and, I mean, I have worked in enough jobs that you get along with people sometimes while other people rub you the wrong way. We are all mature enough people to understand that could have been what happened, but it did not. We came away from that trip feeling that we all got along really well; we all had different strengths and things that we could bring to the program, and a variety of other experiences. (Teacher A, Interview, April 19, 2011)

The trip had benefits for Teacher B as well, but with a different focus:

At that point, I was definitely “on board”. For me, that week was an opportunity to take the material that I had read and actually see it. . . Seeing it in action really tells a different story. That week for me was an opportunity to actually meet people that have been in the position that I was about to take on. [Some] have been there for a number of years and have had experience with different types of students. It was an opportunity to meet students and get their feedback directly. When you are reading a book, you are getting the stories that the author chose to give you, but when you talk to students directly, you are getting every story that they have to tell. Therefore, it was a good opportunity just to

inform us and just to give everything a reality and take it outside the context of a book and put it into action. (Teacher B, Interview, April 2011)

In terms of organizational supports offered the professional development that Teacher A had undertaken affirmed A's involvement with the SOSD Met. "Often it was reaffirming because you would find things that they were saying – well gee, we have been doing this in our division or this is something that I have been doing, or that is really interesting, I would like to try that" (Teacher A, Interview, April 19, 2011).

Teacher A had every confidence in the other colleagues and administrator, who A viewed as informed to guide and support the process:

. . . Adair is a very well informed person and as our leader, she was able to be a terrific guide and supporter. She has always been fabulous as our leader, but it was always a very collaborative coming together. Although we rely on her as our principal, when we get together to discuss things, it is very open and it is very collegial and she is always open to suggestions and ideas that we have. It has always been a very collaborative process. (Teacher A, Interview, April 19, 2011)

Utilizing what the staff felt were the core curriculum documents (English Language Arts, Social Studies, Mathematics and Science) for grades 9 and 10, two advisors over a two month period created the Met Academic Plan in response to Manitoba Education concerns over academic rigor.

In the beginning, we focused on the core - English, Mathematics, Social Studies, Physical Education, and Science - so we really focused on what we do with those courses, as we would be touching each student's learning plan with those curricula. From an elective

standpoint, we looked at that as its own bucket [set of course options]. We did not focus on picking any one elective because we had no idea, at that point, who was coming to us as students. (Teacher B, Interview, April 19, 2011)

Therefore, the compulsory courses would serve as the foundation of the SOSD Met program along with PE/HE timetabled through GCC. The group decided that the learning goals aligned with four of the provincial compulsory course. They were aligned as follows: Empirical Reasoning with Science; Quantitative Reasoning with Mathematics; Communication with English Language Arts; and Social Reasoning with Social Studies. The fifth learning goal – personal qualities, would be infused through the other programs. The options would entirely remain student choice. Teacher B found the process very challenging in creating a marriage between Manitoba Education and BPL standards:

Part of why I love the Big Picture Model is the learning goals. Sometimes it is hard to justify why curriculum goals are determined for the age and grade, which they are set for, whereas the learning goals are more focused on skills than specific topics. (Teacher B, Interview, April 19, 2011)

Another organizational factor that aided in the process of developing the academic plan was in creating a workspace for the advisors in the West Kildonan Collegiate. “West Kildonan school provided space at which everybody could meet, and it was a great place to work” (Teacher B, Interview, April 19, 2011).

Implementing the Met school concept and adhering to the philosophy of a Met program forced Teacher B to be continually thinking about students, curriculum, and relationships. One of the biggest challenges B faced was the match between student (interest) and internship

placement. Teacher B believed that every student was different and that planning had to reflect this belief. The development of the program was much like pioneering as they were venturing into “unknown territory”, but he believed that the program would require steering and not everything would play out as planned or hoped for (Teacher B, Interview, April 19, 2011).

In terms of dealing with interpersonal challenges in the work place, Teacher B expressed the following view:

Actually, I did not [experience interpersonal challenges]. You know, we have all worked well together right from the beginning. While we are all very different people, we are all very similar in so many ways, be they teaching philosophy or personal attributes.
(Teacher B, Interview, April 19, 2011)

A key factor in this process, and one that continues today, is the adherence and importance placed on individualization of a student’s program embodied by BPL’s philosophy and the importance of relationships. Teacher B believed strongly that a person should do and study whatever he or she is passionate about. Teacher B further commented on how the process was one of continual reflection (Teacher B, Interview, April 19, 2011).

The August 2009 PD session focused to a significant degree with Greg’s assistance on preparing for the first two weeks of school, the month of September and then the quarter (G. Young, Interview, March 23, 2011). Conversations were the main form of communication and problem solving, within the CLG and even with decisions that in the end only Adair would make in her role as principal. This nevertheless did not lessen Teacher B’s sense of involvement.

. . . Adair is going to make a decision, but I do feel involved in everything. She brings as much information to us as she can; she tries to involve us in her decisions. . . . When it

comes to things as we talked earlier, PD, field trip opportunities, how we are going to spend our budget in terms of supplies, outfitting the students with the materials they need to learn, and what they need to learn. Adair gives us many responsibilities and the flexibility in terms of how we approach them. I feel she is incredibly approachable as a person Up to this point in the two years that I have worked with her, she has never said no without at least having a discussion and developing an understanding from both sides of the coin. . . . everything that we've decided on whether it's being a green light or a red light at the end of the day, it's always been fair. I have never worried about approaching her with anything and the students do the same thing. . . . The students know that they can approach her . . . "we want to do this in the classroom, can you make it happen?" (Teacher B, April 19, 2011)

As a collective leadership group, the advisors along with the principal (Adair) were a cohesive and small group. In reviewing the transcripts and the above story that developed, it is very clear to the researcher that the group functioned as a supportive and collegial group. There is no evidence of unresolved or festering issues that can accompany such a radically transformed organization. Granted, for a group which had no history prior to its initial meeting, an informal evening dinner before the California trip in May of 2009, much can go awry within a group of four who are charged in the undertaking of a project. The individuals who comprise the group share the same philosophy that distinguishes a Met school while maintaining their own individualities (Teacher A, Teacher B, Interviews, April 19, 2011; A. Warren, Interview, March 7, 2011). They work as a team (Teacher B, Interview, April 19, 2011) that grounds itself on the "one child at a time philosophy", learning goals, and their own relationships together. The

experience afforded to them from the Sacramento trip and then particularly the collaborative writing of the Academic Plan “gelled” the group into a cohesive team.

The challenging nature of creating a new program from the ground up would not have happened without the collaboration and trust (Teacher A, April 19, 2011) afforded through the nature of the work. Further, the supportive leadership of Adair is clearly noted. Each individual’s knowledge, expertise, and life experiences that occurred prior to teaching was acknowledged and respected. There is a high degree of confidence in each other in meeting unanticipated challenges as indicated in this excerpt from the interview with Teacher A: . . . “I do not have to do everything. I respect them [other advisors] a lot and I totally believed in the work of developing an academic plan” (Interview, April 19, 2011).

As evidenced in the following comments about the anticipated hiring of a fourth advisor for the 2011-2012 academic year, Teacher A expressed the following sentiments:

. . . As staff we are open to new staff coming in, we are all feeling fine about that. Adair is a great judge of character and we feel she has made good choices – obviously, we feel she has made good hiring choices and put together a strong team. I think that speaks to her ability to put together a great team. She could probably see things that we do not see in ourselves, but we believe in her decisions, and we will do everything to make the new advisor feel welcome and support that person. (Teacher A, Interview, April 19, 2011)

Much of what informed the group as to how they were doing occurred in the implementation of the school design and through the feedback received from the students and Greg the BPL mentor. Greg holds a very strong belief about the power of student feedback:

Big Picture centers on kids and students – one student at a time. Ultimately, they are the benefactors and they can speak to their experiences and ideas. They can talk about the role of the advisor vs. the role of the teacher. They can really talk about the change piece; I think they can capture that in a way that would capture some senses of actual change, much more than talking to teachers about it. Because they will tell it like it is. I do not know the Winnipeg kids as well as I know my students, but I know them enough to say they have some great stories, great perspectives on change, and great insights on how this experience has affected their lives . . . They may not know the wording of the distinguishers because they are not necessarily something we focused on. However, they can speak to an advisor, they can speak to real world learning, they can speak to personalized learning plans, speak to the importance of relevance - I think it is an interesting voice . . . at the end of the day; this whole thing is about kids. (G. Young, Interview, March 23, 2011)

Receiving this type of feedback from students and the choices they make along with information from the partners through LTI mentors allows for an information-laden work environment that facilitates more flexible, self-managing structures that encourage responsibility for process and accountability for results (Pinchot & Pinchot, 1994).

The CLG members enjoy working within this challenging, novel, and student focused environment that forces all to “continuously plan ahead” (Teacher A, Interview, April 19, 2011). In terms of the functioning of the group and how work is distributed, it possibly is best summed up through Teacher A’s words – “I am comfortable with other people taking a job” (Teacher A, April, 19, 2011). This comment interested me as during my individual interviews with Brian and Adair, each made comments about the types of staff members they wanted in the Met school.

Two factors appear critical - other life experience besides teaching and the ability to be a part of the group or “to leave one’s ego at the door” (B. O’Leary, Interview, May 5, 2011).

At the organization level, the analysis has tangible products that result from the thoughts and actions of the CLG. The school follows the 10 distinguishers set out by BPL as is evidenced through the structure and programming of school activities. Based on the interviews and follow-up conversations with staff, morale is high in terms of an organizational outcome. All three advisors were asked if they wanted to transfer or remain with the program moving into the third year. All returned for the 2011-2012 academic school year. Further, there is a sense expressed by Teacher A and Teacher B through their interviews that welcome the establishment of other Met schools in Canada so that they could have a connection to other people.

Specific changes in the content of the strategy demonstrate evidence of the thought that went into the organizational outcome of creating Canada’s first Met school. While there are schools, as evidenced in the annual submission of school plans to Manitoba Education with plans to increase family involvement, utilize authentic assessment, personalize a student’s program, develop student engagement and finally employ advisories in terms of personalizing the high school experience for students (MECY, 2009), none attain the level of implementation as does the SOSD Met. This claim is based on the documented implementation of the distinguishers as defined by the content of the strategy. This is apparent in the language and references made in the Academic Plan to such features as exhibitions, LTI, and student interests in the Met school Learning Model (Figure 4.1, p. 76). Further SOSD Met interviewees expressed a common language when describing their work and showed commitment to the philosophy of BPL through an evolving content of the strategy. Additionally, “reform agendas at the provincial, territorial and often school district level have centered on government commitments to greater

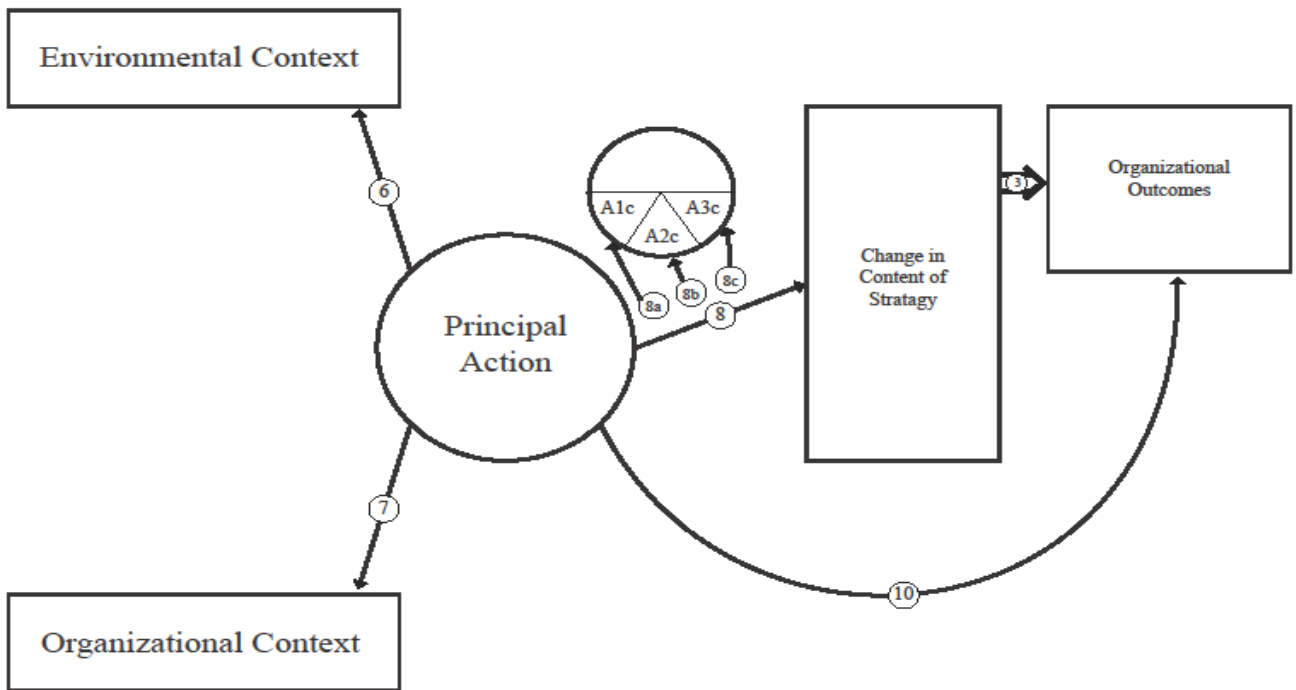
accountability and improved student achievement” (CEA, 2007, p. 3). How the thoughts of the staff and aspirations of the BPL philosophy translated into action is the subject of the next section of the chapter – principal and CGL action.

Principal and Collective Leadership Group Action

For action to occur, as noted by Weick (2009), the organization must undergo two transformations: firstly, the organization has to be contextualized so that it becomes a unique representation, as in the case of the SOSD Met. Secondly, it has to be ‘voiced by someone who speaks on behalf of the network and its knowledge’ (Taylor and Van Every, 2000, p. 243), as evidenced by Adair.

Action, as displayed in the AR-S model, is by the agents of the SOSD Met: principal, advisors who collectively act as the collective leadership group. Principal action as hypothesized in the model (Figure 5.3) is aimed at three contexts - the external environment (Link 7), the organization (Link 7), and the content strategy of the organization (Link 8); and at the internal composition of the CLG (Links 8a, 8b, & 8c). The CLG’s action (link 9) is by the adoption of BPL’s program and through the development of the Academic Plan that created the changes in the content of the strategy. The extent to which the changes made in the content of the strategy are uniquely reflective of the actions taken by the principal and the CLG is shaped through the cognitive interpretive processes of the goals and constraints posed by the organization and the environment concludes the section.

Figure 5.3
Principal Action



Actions by the principal aimed at the external environment fell into two categories: those that focused on the content of the strategy and those that built environmental support for the new school. Components of the change in the content of the strategy involve the creation of the SOSD Met as outlined in the MOU and the creation of the Academic Plan. The responses to administrative actions serve as forces that build environmental support – attracting registrants through a variety of communication activities, communicating with BPL and Brian O’Leary, and responding to questions from GCC staff, parents of and prospective students, individuals interested in applying for an advisor position, and importantly with the administration of GCC.

In pursuing the agenda for change through changing the content of the strategy, Adair viewed her approach as systematic and intuitive . . . “systematic in terms of an approach but I also believe in intuition and things that are harder to pin down but are very important for sound

judgment.” (A. Warren, Interview, April 19, 2011). Her own understanding of the Met had developed since 2005 through PD initiatives with staff. “We had paid a lot of attention to Littky’s book from a teaching practice point of view and from the perspective of educational relationships with students. We also looked at creative multiple curricular interdisciplinary projects of Met schools” (A. Warren Interview, March 7, 2011). Further, in her experience within the division,

We are always taking a look at what is out there and seeing if it has relevance, seeing if it has an application in our school community . . . What is on the edge in education and where are we relative to that? (A. Warren, Interview, March 7, 2011).

These professional development activities reinforced Adair’s experience in the middle years environment where she had “thrived and enjoyed the world of teaching” (A. Warren, Interview, March 7, 2011).

There is a lot of the philosophy that pulls into a Met school/high school environment in the sense of relationships with kids, and the teacher’s role in facilitating them. Certainly, it was something I definitely paid attention to and felt that I understood from Littky’s book and through the stance of an inquiring mind. (A. Warren, Interview, March 7, 2011).

The combination of professional development activities with Adair’s life experiences allowed her to develop a clear understanding and conception (through her beliefs) of achieving the SOSD Met. The conception and understanding of the Met continuously developed through the early months (February – April 2009) of developing the school until staff were assigned who

would make the actions a collaborative endeavour to achieve their agenda for change – change the content of the strategy through the creation of the SOSD Met (May and June 2009).

The building of environmental support was the direct responsibility of Adair in her role as Met Coordinator until the school came into existence at which time she carried out her responsibilities as principal of the SOSD Met.

In order to have a school operational by September 8, a number of sequential steps required action and completion. The reality of time, while a constraint, served as an organizing tool as well. Priorities were set based on typical timelines of a high school: information sessions for prospective students, March open houses and presentations, middle year school visitations, and registration procedures. All of these required the creation of information packages, brochures, coherent and informative presentations and the creation of a web site (A. Warren, Interview, March 7, 2011). This would be the first web site that Adair had created.

Concurrently, in fulfilling these typical administrative routines found in high schools, Adair needed to develop a deeper understanding of the technical and philosophical requirements of a BP school. To assist in this undertaking, BP offered support services in the following areas:

- Alignment of BP implementation to local/[provincial] standards.
- Identification of appropriate developmental activities for specific areas of need.
- Assistance in principal growth, as an instructional leader, and in promoting school growth.

- Developing a strong quantitative culture that includes both mathematics and qualitative reasoning.
- Developing a post-high school transition plan for all students.

(Big Picture Services, 2009)

During the time before the first information sessions and visitation to middle years schools, Adair engaged in meetings (telephone, e-mail, and face-to-face) with the superintendent, Greg (BPL mentor), and GCC staff along with any other interested party who had questions about what was proposed with the SOSD Met. These conversations were described as evolving. She relied on the use of flip charts to organize tasks and events monthly and used her own planner, which consisted of two-pages per day. One side was devoted to tasks while the other was a “thought page” where she recorded ideas or set targets. Her approach was strategic, pragmatic, and timely:

These were things I need to figure out – tables, drops[computer keyboard], cubicles, business cards – these are things that as I am doing other stuff – I go oh yeah, what about this, and so I just put “oh yeah, what about that?” over there. So, it extends, of course, I kept this system, so to speak, in place into March . . . the registration evening was huge and it shows you things that I needed to do, even things as mundane as signage – you know, announcing where we were and putting up signs in the school – all of those things – it was work, 10-12 hours day. (A. Warren, Interview, March 7, 2011)

Her actions driven by tasks and completion dates:

By registration evening [March 12, 2009] – I wanted to have the website up so parents could look at it. Into April/May now we are talking about student recruitment – accepting

students and adding them to the mail list – once again, I had to learn to do labels for envelopes – all of these things seem little but I had to figure it all out. If I accepted a student, I needed to make sure the family was on the mail list. By this time, we have staff assigned, and we had to deal with all the logistics of travelling abroad. Lots to do; the planning is huge. Doing newsletters for family information, setting up family interviews in June, just everything to keep it all going. (A. Warren, Interview, March 7, 2011)

The aspect of developing understanding of this innovation offered to high school students became a key factor. One concern that Adair was quite cautious about through her presentations and in communication with parents, was she did not want to oversell the idea of the SOSD Met (A. Warren, Interview, March 7, 2011). “I will use the word oversell; we did not want to have interest beyond what we could accommodate because we did not want to have to turn people away, we did not want to have families disappointed in what we could support” (A. Warren, Interview, March 7, 2011). So part of the challenge was to have the level of interest match what SOSD Met could support and to carefully position what information was out there to achieve that match. She needed students but to receive a large number of applications would have created a situation where student refusals would occur as the plan called for only three classes to start in the fall.

Adair described her strategy as follows:

More or less, generate the interest first. Going into Spring Break [typically the last week in March], getting some registrations in . . . I remember that it took some time for some of those registrations to come in and not all of them came in right on time. Brian and I met before Spring Break and we were at a point where we felt confident going ahead with

three classes, although we did not have all 40 students at that point, but we knew there were others coming in. We were close enough that we felt confident to go ahead and hire the three advisors, and so I believe we posted the position just before Spring Break. (A. Warren, Interview, March 7, 2011)

Actions by the principal aimed at the organization (Link 7) focused on developing the agenda for change through changes in the content of the strategy. Further actions taken covered a broad spectrum: liaising with the administration of GCC on timetable matters; integrating the Met structure with the Comprehensive Information Management System (CIMS) of GCC; hiring of advisors; building alterations; communicating with the staff of the host school; and leading and managing the advisor staff once selected.

Yeah, it was huge, airport pickups [in January 2009 of Elliot Washor, Greg Young and his students], billets, local transportation . . . the details that make or break hosting an out-of-town group. What makes sense? We brought this group along to any middle years that we were visiting during those times. We also hosted an information session for Garden City Grade Nine students and those students were helpful. I needed to download Big Picture stuff – we had it as part of our information package and had it on display for the open house and registration evening. (Adair Warren, Interview, March 7, 2011)

Actions by the principal, aimed at the Content of the Strategy (Link 8), divide in three phases: prior to advisor hiring, readying for school start up, and the running of the school. These actions were informed by Adair's understanding of the Met philosophy and the MOU.

There was an opportunity to attend a Big Picture Conference; in the end we did not do that. The timing was too tight – our picture was having staff in place and being able to

put it together. In reality, it was just not a good fit, so we delayed that trip to later.

Ordering agenda books for the students is a simple thing – but we did order the Big

Picture agenda books, which are student agenda books with a Big Picture point of view.

Our Met school students do not have the usual agenda books³⁴; they have the Met school agenda books. Also, just understanding how is a Met school going to function in terms of CIMS [Comprehensive Information Management System], our student organizing system in terms of credits and courses, how to get the Met website up – I had never done a website before and I had to learn, and just understanding how the finances of Met would work. (A. Warren, Interview, March 7, 2011)

While Adair developed the information communiqués and put the enabling structures into place, staffing became the next priority. Advertisements (Appendix W) for three staff positions went out before spring break, 2009 (Adair Warren, Interview, March 7, 2011). Prior to this, Adair had already been fielding calls and inquiries from interested teachers. She described the approach to hiring as holistic with the intention of the process to “get to know the applicants” along with exploring their philosophy of education. Interview sheets through SOSD, and Adair’s experience with the infusion of questions particular to the SOSD Met school shaped the interviewing process. Through the process, at times, Brian and/or one of the assistant superintendents conducted joint interviews with Adair, as the candidate pool got smaller. The hiring of appropriate personnel to fit the” job” is a key process in terms of building capacity.

With input from Brian, by the end of April, Adair had selected her three staff members. Interestingly, she made the call to offer the positions to the three candidates. The elapsed time was about one month. Within two weeks of the hiring, the SOSD Met staff commenced work:

³⁴ See Appendix X for excerpts from the student agenda book – Super Calendar 2010-2011.

Once we had a staff, after student registration and the job posting, which was a very interesting time because you did have those people headed in the same direction and we were doing it together. That was for those months of May and beyond; I would say that their enthusiasm and their willingness to put the pieces in place were noticeable and they really came at it with a vision of the Met school. It was nice to see some of the early steps evolving into initiatives that were now being done either by other group members or all of us as a group. That was really an interesting part of the job, - to step into a world where other people were actually there with you, rather than my having to step out and talk to someone like Howie or Brian. (Adair Warren, Interview, March 7, 2011)

Once the team formed, two key actions occurred: (1) the decision to assign two advisors full time to work on developing the academic plan itself, and (2) the plan to visit Met Sacramento.

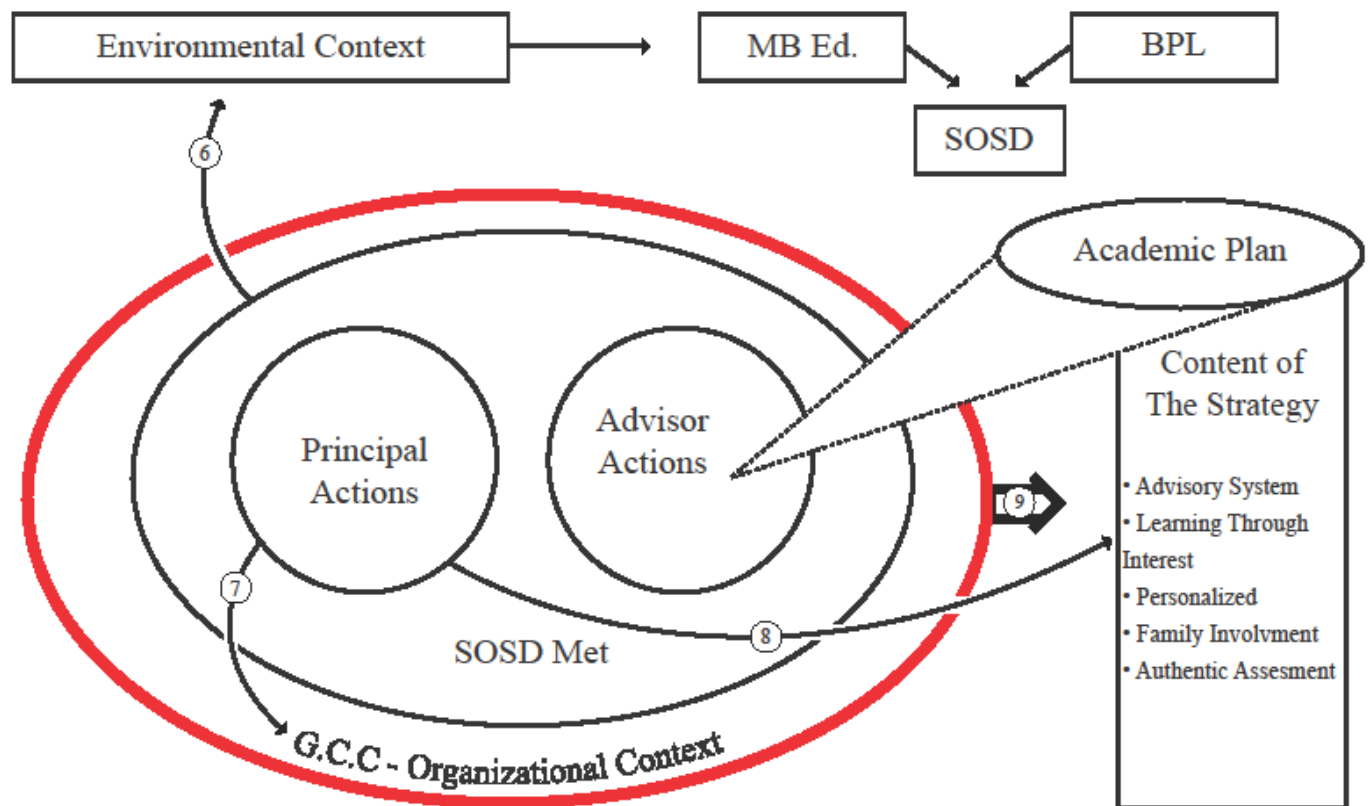
The decision to go to Sacramento was strategic. The Met Sacramento School in its first year of operation, while other schools were further along developing their programs, would be a more appropriate site based on their experience and implementation history to date. “The feeling was the site had more in common with where we were at then having to go to a school that had progressed through the early stages and hardships and was now a “model” school”. (A. Warren, Interview, March 7, 2011)

The choices made by Adair and other members of the collective leadership group reflected a strategic planning process. It is strategic in that the principal and advisors were “intentional about their goals and methods” (Allison & Kaye, 2005) – create the SOSD Met school relying on the philosophy of the Met and employ the distinguishers. The response to the

environmental conditions created by the interplay and institutional expectations shaped the actions of the collective leadership group (Figure 5.4) in establishing the SOSD Met is the phenomenon under scrutiny.

Figure 5.4

Action by Principal, Advisors, and Collective Leadership Group



Adair describes a sample of the collective leadership group's decisions, in this excerpt:

. . . What we have been talking about up to now is essentially planning for and then of course what happens is we go live. . . This is a dynamic staff-planning portion that we had, because we had to plan for the family interviews. We had to talk about the structure

of it, “What was the schedule of it for the days? What did we have to mail out? What had to be in the newsletter and to be on the checklist in terms of discussion with kids?”

Applications – “Did we have all of the forms?” Transportation – “What do we hand out to the families?” – So the four of us just sat around the table and asked, “What do we have to do for family interviews?” This is an example of a shared brainstorming session – it is organic – it is really an active process and it grows. It starts somewhere on the page and by the time you are finished we were actually able to form a cohesive list, where as a staff we could reflect our academic thinking around day one – week one. “What is our schedule?” What is the curriculum and how do we assess? I found it was challenging, the accommodation of the technology and the maintenance plan; to get the computer drops; to order furniture. It was a huge endeavor and, once again, something that took a lot of time. (A. Warren, Interview, March 7, 2011)

As the work on the Academic Plan progressed, some of the conversations moved to foundational types of questions as evidenced in the following two excerpts:

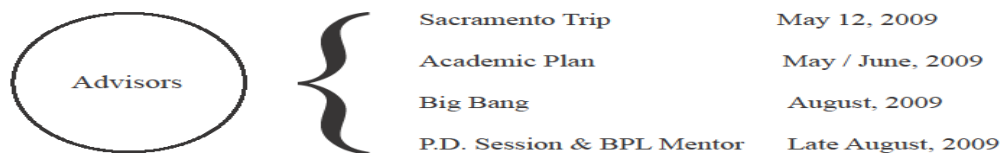
How do we measure this? I find it is interesting that student engagement we tied to student retention. We felt that if students engage they would stick around. We tied it to quality, well cared for portfolios. If kids care about their work, they will take care of their work. Therefore, we took measurable strategies and timelines and we did that very specifically. Some things we determined that we had to do now. These things, all of these things, were in our report to the community (Appendix Y) because we believe that we needed to demonstrate evidence of our work, our professional development, and the goals that we have for ourselves. (A. Warren, Interview, March 7, 2011)

In the following excerpt, discussion around the topic of assessment, and the public's awareness of the quality of work, was the focus.

I want to talk a bit about the idea of being publicly excellent, because this generated from a time when Howard and I as vice principals of GCC took that concept from the Met school philosophy and asked how we could implement it in SOSD. This same idea became the foundation of our plans for the Met school. (A. Warren, Interview, March 7, 2011)

Actions by the advisors (Figure 5.5) aimed at responding to the external environment (Link 4) are separated into two periods: before school opening in September of 2009 and then after school opening. This separation in time addresses the nature of the expectations and type of pressures placed on the SOSD Met and the responses defined by the type of actions taken. Attention is on three activities that the advisors were actively engaged: (a) in May and June of 2009 (b) participation in the Big Bang Conference; and (c) the August PD session with Greg Young. Cumulatively, the above actions underscore the development of the Academic Plan, an essential component of the changes made in the content of the strategy.

Figure 5.5
Actions by Advisors Prior to Implementation (September 01, 2009)



Much of the day-to-day activities appear loosely coupled but operate within a tightly coupled overarching structure. In cases where there was clear division of responsibility, it fell on the shoulders of two of the advisors to create the Academic Plan while it was Adair in her role as principal who liaised with Brian O’Leary (A. Warren, Interview, March 7, 2011). This is developed in the previous section as evidenced by Teacher A and B’s comments about roles and decisions.

The institution in the external environment exerting a strong influence was Manitoba Education. This influence continued until the end of June 2009 when the academic plan was completed. By completing the academic plan, the SOSD Met staff had a document that outlined the integration between Manitoba Education course outcomes (GLOs and SLOs) and BPL’s learning goals. This provided the staff with a plan for covering outcomes and provided a sense of direction set out by the demands of meeting provincial outcomes at the grade 9 and 10 levels. Equally, the expectation on the team to address and remain true to the underpinnings of the BPL philosophy as outlined in the MOU by the second institution in the external environment, BPL, remained foremost in the planning. After the trip to Sacramento, developing a “marriage between BPL and Manitoba Education” (Teacher B, Interview, April, 19, 2011) would be the full time task for principally two of the advisors with input from the other members of the collective leadership group. For Adair, the addition of “staff” created a new operating framework and

It was interesting to see others take a role, on things that I had been doing out of necessity. I would say that it was interesting and surprising to see things evolve. I was surprised by the clear vision that they had. The experience of each blended together well. I was pleased and encouraged by what I will call their competence, skill, and dedication.

[While] it was not a surprise, it was just interesting to see all of it . . . evolve. (A. Warren, Interview, March 7, 2011)

Their interactions with the agents in the external environment were limited, as the task would be consuming. This task assignment was formalized by the assignment of two advisors to the writing of the Academic Plan through May and June while other factors are classified as informal - such as interacting with friends and colleagues who were curious about the innovation. Teacher B expresses the spirit, curiosity, and excitement experienced in the following excerpt:

. . . I think part of why I knew what I was getting into was because the assignment started in May and June of 2009. Partially just because of the external, I guess, forces in my life, the people around me, the friends in education who were job hunting at the time and just knowing the reaction to "What is a Met School?" The people that did know about it were like "Wow, that's a great opportunity" and just like it was big, it was big right from day one. (Teacher B, Interview, April 19, 2011)

The advisors actively engaged within the organizational context of the emerging SOSD Met as a work place due to their collective experience in Sacramento and as two of the advisors took on the responsibility of developing the academic plan.

. . . The only real order was, "You are going to create a Met School in Manitoba." In Manitoba, we have a completely different set of standards and there is a completely different political background in Providence, Rhode Island or Sacramento, California where we visited, or any other Met School. . . . Just like we had to find our way of doing things in a Manitoba context, every Met school has its own set of state laws and state

politics and the people need to find a way to make it work. So that set of instructions is you're going to make a Met School, we don't want to lose any of the Big Picture philosophy but we also can't lose any of the Manitoba Education requirements or standards and so that was basically it, "find a way to make those two ends meet". . (Teacher B, Interview, April 19, 2011)

With respect to developing the Academic Plan, Teacher A's recollection of their approach as strategic in their planning was similar to Adair's.

We had many conversations about the spirit of Met: what it is, how it works, and then how we fit into the Manitoba context. That was a big part of what we did last year – figuring out how that can work and keeping it within the Met school spirit but having to have report cards with grades. (Teacher A, Interview, April, 19, 2011)

These conversations were for the most part informal and spontaneous as they evolved out of the work. Regular meetings were held as well with Adair as she felt that "it was important to keep a structure to some of our discussions and to have an administrative role in terms of a point of view" (A. Warren, Interview, March 7, 2011).

From the outset, all respondents commented on how well everyone came together and worked as a cohesive team. In this excerpt, Teacher A stressed how each of them complemented each other's skill set . . . together we were able to align what the kids were doing with the appropriate credit" (Teacher A, Interview, April 19, 2011).

To make the design of the academic plan manageable, the decision was to concentrate on the compulsory courses offered in the first year and leave the options with student choice and individualized programming until September.

At that time, we were not as advisors in direct contact with Manitoba Education. We took it upon ourselves to get a solid understanding of the curriculum of the four core courses because we knew that Physical Education would be something that students would be doing in the gym with a Phys. Ed. teacher. We took it upon ourselves to know Grade 9 and 10 Science, English Language Arts, Social Studies, Geography, and Mathematics at an essential or consumer level³⁵. We knew what Manitoba Education required of a school and we went with that. (Teacher B, Interview, April 19, 2011)

The learning plan created by the staff was comprised of the Manitoba curricular outcomes, grade level standards, LTIs (Learning through Interest/Internship), SBPs (School Based Projects), Met school learning goals, assessment plan, timelines, and resources needed for completion. Tracking documents created for the core courses covered all GLOs and SLOs and integrated with the five learning goals of BPL. The student and his or her advisor had the responsibility to link LTI projects and SBPs curriculum. This information is placed directly into the Learning Plan created on the BPL website – www.bigpictureonline.org. Three forces shaped the learning plan: BPL, Manitoba Education and the individual student aided by the advisor.

The exhibitions and assessment conformed to the philosophy of BPL with respect to quarterly exhibitions, ongoing dialogue, and portfolio development. Documents contained in the Learning Plan include the set criteria for the quarter, curricular outcomes, journals, and LTI and SBP work. Advisors assess the rigor of the work in terms of depth and breadth. Credits for high school are obtained through student LTI projects and SBP work. A general 5-point rubric created by the staff is used to assess student progress and the extent that goals have been met in the quarter.

³⁵ Essential or consumer level is that mathematic skill level required of an individual for an entry level job or career.

The Met School Calendar reflects the annual structure of the program. The calendar highlights the Learning Plan and the exhibition schedule and additionally the planned workshop schedule to ensure that difficult curricular outcomes have been met. The break down is contained in Table 5.1.

Table 5.1

Time Devoted to Topics in Met School Educational Calendar

Topic	Number of Weeks (out of a maximum of 37)
Who am I?	03
Book Report	22
Journaling (3 x per week)	37
Community Service (Emphasis on Social Studies)	37
Workshops	
English Language Arts	10
Mathematics	16
Science	05
Social Studies	06
Technology	08
Physical Education	37

Learning Plans	08
LTI Preparation	12
LTI	24
Exhibitions	08

The calendar represents a strong example of the unique contributions of the four individuals that comprise the CLG in terms of how they structured the academic year based on their understanding of the curricular outcomes, the learning goals and the philosophy of BPL.

In terms of the content of the Academic Plan, Teacher B identifies some influences but in general, the plan was to be a made for the group and in the context of SOSD Met:

We started developing our own. We asked – “Ok, what does a Big Picture Advisor need to look at? What does a Manitoba teacher need to look at? How can we make those two things work together?” We completely developed our own concept of what it is going to look like in our classrooms. “What are our class systems going to look like on our computer?” We started from scratch and Providence was an opportunity to look at what other people were doing and then look at what we made and then say, “Ok, what's going to work? What might we have put too much emphasis on?” Now before we developed those documents, we did spend that time in Sacramento, so there were influences you could say but we never had any physical templates or documents. (Teacher B, Interview, April 19, 2011)

At the end of June, the academic plan was ready, students were registered and it was time for a break.

We took the opportunity to have a summer and I think that's one of the important parts of the job is taking some time off and I think it was important that we did distance ourselves from it a little bit. We did come back to it towards the end of August. As you are aware, we have a mentor from Big Picture Learning and he came to us before the school year started at the end of August. I think that was important to bring our heads back together. (Teacher B, Interview, April 19, 2011)

In August of 2009 was the Big Bang Conference hosted by BPL in Providence, Rhode Island.

When I went to Big Bang, it really set the tone for the spirit of what Met school was. . . I think in terms of meeting other teachers, being able to have many casual conversations: interesting to talk about advisory and looking at different kinds of things. . . I think it was just a great way to start to feel part of that community feeling . . . a part of the bigger community is important. A big part of [Big Bang] is team building and helping people develop relationships. (Teacher A, Interview, April 19, 2011)

The common experiences of the collective leadership group through the Met Sacramento trip and attendance at the Big Bang Conference shaped the physical structure of the Met, which according to Teacher B had a significant impact:

I think a lot of that influence came initially from the schools we visited: Sacramento School and meeting advisors in Providence for their summer conference. Before we started, they had a lot of influence just in what they did and how they worked. One of the big influences to our advisory system in our school are six-foot openings in the adjacent classroom walls, which allows movement through all three classrooms. That alone lends

itself to a certain kind of culture and so making that decision changed how we looked at the school as a system of advisories. It now limits our opportunity to contain everything because it is sort of a semi-open area. That decision was a huge determining factor in how we eventually ended up being what we are today . . . (Teacher B, Interview, April 19, 2011)

Other professional development opportunities such as the Big Bang Conference promote development of relationships amongst staff and the development of habits that will translate into behaviours when working with students in their advisories.

[At a Big Bang Conference] many things that one does not necessarily think about in regular schools such as bonding activities with other teachers are regular features of the PD activities. These enable you to learn from the strengths of your coworkers and especially, how they approach their work with kids. (G. Young, Interview, March 23, 2011)

Actions (Link 8) aimed at the content of the strategy were taken by the principal and the collective leadership group (Link 9). The actions had reciprocal effects on the expectations created by the 10 distinguishers in the MOU to reflect the environmental and organizational conditions. This feedback, primarily from students in the program, interacts with cognition and determines behaviour (action) of the advisors in the SOSD Met. The feedback serves as part of double loop learning (Argyris, 1995) for the organization as a whole as adjustments made to reflect a response to the student feedback. In Greg's view, this is the most powerful type of feedback possible as "it comes directly from the students in response to their experiences" (G. Young, Interview, March 23, 2011).

Actions aimed at the content of the strategy focused in first aligning the five distinguishers in the Manitoba context. Five of the ten distinguishers emerged to define one component of the content of the strategy as outlined earlier. The five distinguishers (Learning through Interest [LTI], Personalized Instruction [P], Family Involvement [FI], Authentic Assessment [AA], and the Advisory system [AS] drive the technical core of the school by changing the delivery system of education. The five other distinguishers (school organization, school culture, leadership, school/college partnership) were not addressed in the content of the strategy, as they are concurrent actions or organizational outcomes after implementation. As indicated above, the decision was to develop the academic plan around the compulsory courses offered at the grade 9 and 10 levels. The plan needed to be in place by the end of June for school start up in September. Once the plan was in place, there was a break for summer as indicated by Teacher A and Teacher B. In mid-August, members of the Met attended the Big Bang Conference where they further developed their understanding of a Met school, followed up by Greg's visitation near the end of August. These professional development activities provided the group with information, strategies, resources, and an action plan that covered Day 1; Week 1; Month 1; and Term 1 (G. Young, Interview March 23, 2011).

This completes the findings derived through the case study of the SOSD Met that addresses the second research question as viewed through the AR-S Multi-Lens framework. According to the AR-S Model, changes in the content of the strategy as outlined by BPL and the gap with Manitoba Education requirements were mediated by the CLG through the development of the SOSD Met Academic Plan. The environment exerts forces that determine the magnitude of the organizational change and the importance of leadership and institutional capacity to

embrace innovation. Without the actions of the superintendent and the school board, it is unlikely innovation of this magnitude would have been possible.

In the organizational component of the model, embedding the SOSD Met within GCC addresses the reality of a S-W-S model which enhanced the programming aspect and viability of the SOSD Met. Further, the supportive relationships within the administrative team cannot be overemphasized. Organizational barriers in the host school would have adversely affected the outcome of the SOSD Met school had they been present.

The actions of the principal occurred in overlapping phases characterized by framing, scheduling, communicating, doing, and linking strategies. These actions blend into a dynamic model that favors action. Adair completed the groundwork during the period from February 2009 until April 2009. In May and June 2009, her work continued but in tandem with the actions of the advisors who were developing the academic plan. Once school opened in September 2009, the implementation of the content of the strategy occurred and sustained through the nature of the strategies that comprise the radically altered technical core of high school education.

In Chapters 4 and 5, I have discussed the findings related to the two research questions posed. Specifically Chapter 4 addressed the first research question, *“To what extent is this particular version of the content of the strategy a rational choice in light of the goals and constraints poised by the environmental and organizational factors?”* The discussion, informed by the AR-S Model, began with an examination of BPL and Manitoba Education as environmental factors. The conditions to be a Met inspired school as set out by BPL’s MOU were not congruent with the GLOs and SLOs of Manitoba Education curricula. It was determined that pragmatic decision-making (Martin, 2001) was present in many instances where

decisions reflected both rationality and the reality of the situation. The goal of achieving a Met school would not happen under a regulatory agency such as Manitoba Education. This was a significant constraint.

With respect to the organizational factors, discussion followed the layers of the organization: SOSD, GCC, and then SOSD Met. Through this discussion, it was determined that the Met concept resonated with the desires of the school board to improve graduation rates and to be open to innovation. The leadership role of the superintendent was critical along with the support of key colleagues in GCC. The organizational conditions established by the GCC school principal were significant factors in terms of reducing barriers to implementation. In terms of the SOSD Met staff, the selection of personnel and then the creation of a trusting and collaborative environment created the conditions for the staff to address the gap between the goals of BPL and the outcomes of Manitoba Education.

The second research question was, *“Is this particular version of the content of the strategy the result of the interaction of the cognitions and actions of the Collective Leadership Group and their interpretation of the goals and constraints posed by the organization and environment?”*

The cognitive lens perspective “indicates that gaps between objective reality” and [principal] cognitions [Links 4 and 11] must match the requirements of [the organization’s] external and internal context [Links 15 and 16] in order to be successful (Link 3)” (Rajagopalan and Spreitzer, 1997: 70). The theoretical basis of cognition for principal and CLG action highlights the learning lens perspective. In my view, there is interview evidence that indicates a common cognitive view emerged in the members of the collective leadership group. This view is

significant as it shaped the actions of the collective leadership group in creating the SOSD Met Academic Plan to close the gap between the goals of BPL and the outcomes of Manitoba Education. The actions taken and the development of the SOSD Met are unique in many respects as a function of the goals and constraints posed by the environment and organization. A strong indicator of this is presented in how the Academic Plan was structured (Appendix Z) based on the collective structuring and planning of the CLG.

To conclude, the findings contained in this the study identify the content and process elements of the change in the content of the strategy that created a radically different technical core. The content of the strategy was comprised of two components - the five BPL distinguishers and the Academic Plan that addressed Manitoba Education outcomes. Question 1 focused on Links 1 and 2 (how environmental and organizational forces shaped changes in strategy) and through Links 4 and 11 (how environmental and organizational forces shaped cognitions) and Link 5 (how cognitions shape actions) and Links 8 and 9 (how actions shaped content changes in the strategy). In responding to Question 2, the integrative framework provides a deeper understanding of the processes of the principal and the collective leadership group that determines the manifestation of the content of the strategy. These processes involve principal and advisor actions directed toward creating environmental support (Link 6) through the development of the Academic Plan and creating options for the change to occur. Secondly, organizational momentum for the change process (Link 7) initially created by the principal and then by the staff increase the likelihood of the change occurring. Finally, the collective leadership group learns through the initial problems of the strategic change and employs this learning in adjusting the subsequent actions and cognitions (Link 13) to the Content of the Strategy that provides the sustainability of the change after implementation.

The Adapted Rajagopalan-Spreitzer Integrated Multi Lens Framework

In this section of Chapter 5, I develop the proposition that an integrated multi lens framework provides a deeper understanding about organizational change. The rational lens strategy typically addresses the environmental and organizational constraints and expectations as they shape the changes made in the content of the strategy by the organization. Decisions that address these content factors are labeled rational in that decisions reflect the best choice or option available at the time. These decisions reflect the critical reality for school administrators, in that strategies must match the realities of the organizational and environmental contexts. By proposing the inclusion of advisors as part of the collective leadership group, I am further advancing the notion of teacher leadership as described by BPL but teacher leadership roles are constrained by the demarcation of roles and responsibilities within a hierarchical school system. Their inclusion is an important viewpoint due to the nature of their developmental role in the Academic Plan and by virtue of the structural changes brought to bear on the school in achieving a “one student at a time” philosophy.

At the heart of school improvement issue, in my view, is the fundamental tension between opposites. The issue revolves around the fundamental tension between system transformation and standardization. These opposites confront principles with conflicting pressures, which often demand that both be dealt with simultaneously. The SOSD Met advisors are in the “thick of things” and by virtue of the Met styled school, their capacity to exercise agency is structured within the content of the strategy and through their experience, gender, age, and background. Furthermore, their dispositions toward the Met philosophy are revealed through their ongoing work at SOSD Met. According to the AR-S Model “environmental and organizational conditions directly influence the options for changes in the content of the strategy

(Links 1 and 2) and shape managerial conditions of the need for, and the resistance to, change” (Rajagopalan and Spreitzer, 1996, p. 53) (Links 4 and 11). Principal and Advisor cognitions, in response to this information trigger principal and advisor actions aimed at responding to the demands and understanding environmental/organizational conditions through gathering information and analysis (Links 8, 8a, 8b and 8c). Rajagopalan and Spreitzer, (1996) see the actions then as part of a feedback loop that “reshape cognitions of the need for, and resistance to change” (Links 13, 13A, 13B, and 13C) “and attempt to influence the environment” (Link 6), “the organization” (Link 7), “and the content of the strategy” (Link 9). Actions aimed at the environment/organization determine the response of those agents associated in each context as being supportive or ready for change or non-supportive and resistant of the changes in the content of the strategy. Changes in the content of the strategy result in the organizational outcome of a high school unique to Canada. Link 13 portrays how the principal, advisors and the collective leadership group learn during the strategic change process.

Summary

The reporting and analysis began with the environmental and organizational conditions and changes, followed by principal cognition, and individual and group cognition. Through the cognitive processes, actions by the principal and the Collective Leadership Group (CLG) developed responses to environmental and organizational forces through their changes in the content of the strategy. The thesis that underpinned this work was the specific manifestation of the SOSD Met school was consistent with the cognition of the principal and members of the CLG and by their actions.

Addressing change in the organizational structure by the instrumental case study as presented in this dissertation demonstrated how a change in the content of the strategy has radically altered the organizational structure of the high school through altering processes, routines, and schedules.

As the five learning goals³⁶ are not content-oriented curricula and are not to be viewed as distinct categories, there is no intention that these learning goals become ‘subjects’ in themselves. Further, through Down & Hogan’s work in the Australian context, goals “will never completely and satisfactorily describe everything that is key to the goal” (p. 63). The openness of the learning goal framework promotes an action learning orientation (for both students and advisors) that allows no two students to follow an identical program. In any system where accountability is measured through an outcomes based or standardized curriculum, the openness of this framework is problematic. Appendix Y presents a summary description of the Learning Goal 1: Empirical Reasoning.

Manitoba Education outlines GLOs and SLOs for each course and grade level in high school. In order for students to graduate with a recognized Manitoba high school diploma, these outcomes are to be met. In order to meet the obligations of BPL and those of the province, the SOSD Met responded through the development of an academic plan that would allow the tracking of GLOs and SLOs for the compulsory courses in the Manitoba curriculum (with the exception of Physical education) while offering a personalized education program for students. The decisions that shaped the distinguishers and the Academic Plan represent rational choices by the SOSD Met staff in order to offer this type of program to students. The final content of the

³⁶ Three of the learning goals use the word reasoning. The term originated sometime in the 1300s and is the process of forming conclusions, judgments, or inferences from facts or premises, that is, the process of thinking especially in orderly rational thought ways (<http://www.merriam-webster.com/dictionary/reason>).

strategy developed by the collective leadership group around the BPL MOU as mediated by the GLOs and SLOs of Manitoba Education was the focus of this section of the chapter.

The critical challenge of creating a plan that would address accountability issues and be in alignment with the philosophy of a BP school became the primary responsibility of two advisors during May and June of 2009. The plan needed to address the GLOs and the SLOs of the Manitoba curriculum along with addressing the philosophy of BPL. Therefore, it became a matter of creating a common framework, which would address both external institutions' requirements. To have the school ready for September, the SOSD Met staff faced three broad tasks, in my mind. Firstly, the preparation and planning for a Met styled school along the five identified distinguishers; secondly, the alignment of BPL goals and Manitoba Education outcomes as achieved by the Met Academic Plan; and thirdly, the development of administrative processes in order to have the school operational for school opening.

The first task was accomplished through the series of professional development activities that occurred May through August. The alignment of learning documents would have occurred in May and June. Finally through the work and energy of the principal much of the administrative processes would have been in place by the end of June. These first two tasks represent planning within different sets of limitations. The plan to develop the philosophy and understanding of the Met concept occurred through the PD activities, which represents a process of becoming knowledgeable about the Met concept, and developing the integrative distinguishers that created the action plan for the first day, week, month and quarter of school. This approach reflected a rational approach in that the content of the plan was set out and decisions addressed the external and organizational environments. What are less understood offered by a rational lens approach are the cognitive predispositions of the group members and their openness to being flexible and

adaptable to the various situations with which a Met school must contend. The understanding here is that there was a process to acquire new attributes or reinforce those attributes already possessed by the individuals, of a Met advisor, who would need to contend with demands of a personalized program that required the ongoing creation of new goals as set goals were met by individual students.

In viewing the cognitive descriptions of the members of the CLG and the actions it took, I return to the choices presented near the end of Chapter 4 (p. 113) with the choices CLG would have considered. Again, I would argue that Choice 3 (Develop a change in the content of the strategy that meets the goals of BPL and Manitoba Education) was acted on over the other three choices. This is the case not only because of the features of that choice, but also in how the group actively moved toward changes in the content of the strategy as it did. My argument is that the choice was most consistent with their values and beliefs, how they wanted to work together, and individually, what each person was prepared to do as a member of the staff. An example of this was their decision to match the Learning Goals with the core subjects of the Manitoba curriculum: Empirical Reasoning with Science; Quantitative Reasoning with Mathematics; Communication with English Language Arts and Social Reasoning with the Social Studies. This idea was presented in the Met School Learning Model that situated personal qualities in all the other goals. This occurred even though it was known that the learning goals could not be equated with subject content. In consideration of the two models, cognitive and learning, and their complexities, the effect would have been to reduce the number of alternatives actually considered in a purely rational perspective.

Education for SOSD Met students is radically different from a traditional high school. On its own though, the school would not be allowed to grant credits without addressing the General

and Specific Learning Outcomes of the Manitoba Curriculum. In order to grant credits for high school courses the staff needed to address how the GLOs and SLOs would be met. The creation of the SOSD Met Academic plan addressed both institutional requirements through an integrated plan achieving a coherent curriculum between learning goals and outcomes. The School Board's expectation of attaining higher graduation rates remains a question until an established pattern for graduating classes emerges.

The content of the strategy for educating high school students as outlined previously (pp. 84-85) reflected a constant form, substance and process. While there are examples of alternatives, such as through academies, magnet schools, Edison Schools, 90/90/90 schools, Corner Schools, and provincially, schools such as Children of the Earth School, R.B. Russell, or Argyle School, the structure of these programs and schools reflect the traditional conception of high school. How teachers teach and how their work is structured reflects an industrial model of education, influenced by an agrarian calendar with the noble goal of providing education to all school age citizens. The strategy for educating young people in high school then is familiar yet operates well for only 80% of the students entering public education.

CHAPTER 6

Discussion and Conclusions

[Lincoln] also understood something else. He recognized that while each of us must do our part, work as hard as we can, and be as responsible as we can – although, we are responsible for our own fates, in the end, there are certain things we cannot do on our own. There are certain things we can only do together. There are certain things only a union can do.

- President Barack Obama,
On the 200th anniversary of the birth of
President Lincoln, February 12, 2009
(as cited in Alvy & Robbins, 2010, p. 39)

Introduction

On September 08, 2009, Canada's first Met inspired school opened in Seven Oaks School Division in Winnipeg, Manitoba. While school openings occur annually in Manitoba, this school opening was significant as it represented a radical departure in the delivery of high school education to students. Possibly even of greater significance, is the fact that this school, following the principles of BPL – the embodied philosophies of Dennis Littky and Eliot Washor- opened following a planning period that lasted only seven months. Finally, the case is significant in the aspect that high school is historically impervious to such radical change. The field of organizational/school change, a topic of academic consideration, suffers from a paucity of examples on which to draw lessons to deepen our understanding of organizational change. Additionally, how to structure a technical core of secondary schooling that is diametrically opposed to current practice is of interest.

Chapter 6 begins with a brief overview of the study with a recapitulation of the AR-S Model in light of SOSD Met is undertaken. The final section will address implications derived from this study and recommendations for further research, theory, and practice.

Overview of the Study

The purpose of this study was to analyze the factors that account for the version of the Seven Oaks School Division Met school that was implemented. This purpose was achieved by answering two specific research questions that were elaborated in Chapter Two following the presentation of a conceptual framework that was utilized in the study.

As detailed in Chapter 3, this study was an instrumental case study that utilized an adapted version of Rajagopalan and Spreitzer's (1997) Multi-lens Integrated Model to develop a deeper understanding of school change. The reflexive nature of qualitative study places me within my research; thus, choice of whom I study and what I study is important. I employed the AR-S Model and incorporated Stake's (2006) instrumental approach in this study - using the SOSD Met as an instrument to understand how a change in the content of the strategy affected organizational change. I also adopted Yin's (2009) general approach to single case study, which seeks in-depth knowledge about a unique case instead of broad knowledge about several cases. The research employed a qualitative perspective in order to develop an understanding of how environmental and organizational conditions and changes influenced the cognitions and actions of the principal and additionally the group of advisors charged with the task of creating the school.

Previous research traditions in the content and process schools of thought have yielded conflicting and at times non-replicable results according to Rajagopalan and Spreitzer (1997).

These traditions of research developed through three separate lens or paradigms – rational, cognitive and learning. The approach offered through these lenses applied to each research traditional yield equivocal findings.

In response to these equivocal findings in the management and organizational change literatures, Rajagopalan and Spreitzer (1997) developed a multi-lens integrated model to conceptually and theoretically assist in the understanding of organizational change. This understanding of organizational change develops through study of how administrator cognition informs action to address environmental and organizational conditions and changes. These actions are responses to alleviate pressure, meet demands, or address expectations placed on the organization by the environmental and organizational contexts. Depending on the situation, pressure to adjust the content of the organization's strategy manifests itself through the contexts of the environment and organization. The change in the content of the strategy determines how well the organization has met the demands. While the model is useful for understanding management cognitions and actions, less understood is the role of others in addressing these contextual conditions and changes. The addition of the CLG fills an important dimension of the model that addresses President Obama's acknowledgement "there are certain things we cannot do on our own. There are certain things we can only do together". The application of the quote to the conceptual and theorized role of the CLG in the AR-S Model is apparent. Without the committed staff, implementation of the Met concepts would not have occurred. Utilizing the framework facilitated the collection of relevant data informed through the parameters of this study as operationalized by the overarching research question –

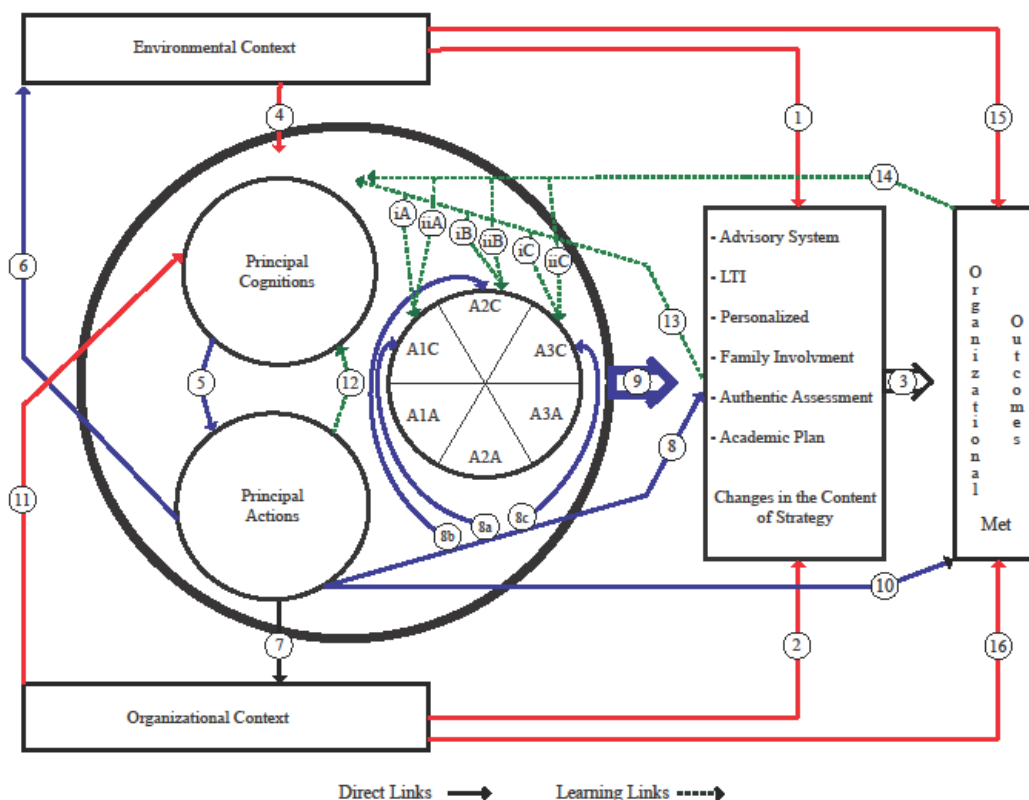
To what extent are the features of the SOSD Met school explained by factors in the environment of the collective leadership group, by factors in the host

school, and by the mindsets, interactions and actions of the four members of the collective leadership group?

The AR-S Model

In this section, I restate the multi-lens framework that integrated the key conceptual and theoretical relationships from the R-S Model that includes the positioning of a collective leadership group with managerial actions and cognitions (Figure 6.1). According to the R-S “environmental and organizational conditions directly influence the options for changes in the content of the strategy (Links 1 and 2) and shape managerial conditions of the need for, and the resistance to, change” (Rajagopalan and Spreitzer, 1997, p. 53) (Links 12 and 13).

Figure 6.1
Adapted R-S Multi-Lens Integrated Model



Principal and advisor cognitions, in response to this information trigger principal and

advisor actions aimed at responding to the demand of environmental/organizational conditions through gathering information and analysis (Links 6, 8a, 8b, 8c and 9). Rajagopalan and Spreitzer (1997) see the actions then as part of a feedback loop that “reshape cognitions of the need for, and resistance to change” (Links 13, 13A, 13B, and 13C) “and attempt to influence the environment” (Link 6), “the organization” (Link 7), “and the content of the strategy” (Link 9) (Rajagopalan and Spreitzer, 1997, p. 53). Actions aimed at the environment/organization determine the response of those agents associated in each context as being supportive and ready for change in the content of the strategy or non-supportive and resistant. Changes in the content of the strategy resulted in the organizational outcome of a high school unique to Canada. Links 13 and 14 portray how the principal, advisors and collective leadership group learned during the strategic change process.

Findings of the Study

The Rational Lens Perspective

This section of study details the findings through the rational lens perspective. The environmental (Link 4) and organizational (Link 11) contexts that affected the school’s capacity to create SOSD Met as documented through the actions of the principal (Link 8) and the CLG (Link 9) to implement changes to the technical core of teaching or the content of the organization’s strategy are the linkages as proposed in AR-S Model.

In applying the AR-S Model in this study, the following observations are reported. The environment (Link 4) held two significant agents that directly shaped the SOSD Met: Manitoba Education and BPL. In attempting to identify the nature and scope of alignment issues between the MOU and Manitoba standards, three areas of “strategic” tension are identified: 1) purposes;

2) standard operating procedures (SOPs) vs. adaptation, and 3) innovation vs. regulation. In terms of purposes, tension goes to the different purposes of the curriculum designers that reflect different goals and motivations. While overarching philosophies at first glance may not be too far apart - *Success for All* for Manitoba Education and *One child at a time* for BPL – the initial gap on credit acquisition was wide. The second area of tension addresses SOPs and adaptation. The Met school concept did not exist anywhere in a Canadian educational jurisdiction and the BPL program would not have conformed to any program development procedures set by Manitoba Education. Further, the government usually provides support for implementation of new curriculum but generally does not have direct control (other than through grants) over compliance processes. Implementing a curriculum as open ended, as the five BPL Learning goals solely with the expectation of credit acquisition would not be acceptable to Manitoba Education. Teacher responsibility for making professional judgments would be even more demanding. While these two areas of strategic tension are apparent, it is the third area of tension that presents as the most significant. The innovation would run counter to the regulations providing for high school graduation. After initial discussions between Superintendent Brian O’Leary and the Deputy Minister, plans for the SOSD Met continued to develop under the “eye” of Sheila Giesbrecht. While the two parties never developed a joint working relationship in this endeavour, Manitoba Education saw its needs addressed through the development of the SOSD Met Academic Plan (Warren et al., 2009). This approval process followed the review of the Academic Plan by the Assessment Consultant of Manitoba Education and later, several site visits. With no apparent “red flags”, the innovation was allowed to proceed. The Academic Plan reflected the goals of BPL and those of Manitoba Education. Despite the flexibility in

compliance monitoring for grades 9-11, SOSD Met students will still be required to write grade 12 outcomes tests in English Language Arts and Mathematics.

It is important to note the ethos of the Division. At least four years prior to the implementation of the SOSD Met school, divisional staff members were not only aware of but also were learning about Littky's work. This occurred within a division that is accustomed to "thinking forward" (Teacher A, Interview, April 19, 2011). The board chair noted this culture at the time (C. Sarbit, Interview, August 25, 2011). As well the division was continually open to exploring new avenues to engage students. The short gestation period for the SOSD Met school can be attributed at least in part to the Division's culture. Another part of the culture of SOSD was the conversations at the board level regarding the SOSD Met school. The "passionate and knowledgeable superintendent" (C. Sarbit, Interview, August 23, 2011) in pursuing the project managed to get the Board to approve the expenses for the Met school as part of the budget for the next school year rather than as a separate motion (C. Sarbit, Interview August 23, 2011). The actions of Brian O'Leary, superintendent, that created the compelling vision and its articulation is a clear act of leadership (Schlechty, 1990).

The second and final agent in the environment that exerts a significant force is BPL. Provincial and divisional constraints affect the style of the SOSD Met as stipulated in the MOU is most evident through the creation of the Met Academic Plan by the Met staff. Once the formal MOU document was signed, the SOSD staff had access to an assortment of different supports, not the least of which was the BPL mentor – Greg Young. Prior to and in the school's first year of operation, Greg had been on site almost 20 days providing support to the entire SOSD Met staff.

The conditions created in the SOSD Met as a school-within-a-school (S-W-S) and the host organization GCC support the development, implementation, and as the school moves into its third year, the sustainability of the innovation. The collaborative work relationships occur within the SOSD Met and between GCC foster a climate of open communication and problem solving. The existence of the S-W-S structure creates an interdependent state for each organization. The AR-S Model accounts for this state of affairs by placing the SOSD Met within the GCC organization. The philosophy of putting students at the center of the enterprise in both organizations provides for a common language and understanding about how to approach kids. The importance of openness to the SOSD Met housed in GCC by Steve, its principal, cannot be overstated. The integration of SOSD Met students - their use of resources, their participation in GCC classes, their consideration in timetabling for the host school, and their access to facilities and services -allowed for the SOSD Met as an entity to function in a comprehensive way. Importantly, it also provided a safety net for parents who may be uncertain, as to what their child was “getting into” (S. Medwick, Interview, April 19, 2011).

According to French and Bell (1978), any major organizational change receives the initial thrust from the human-social and the structural systems of the organization. In the case of the SOSD Met as an organization, both the human and structural systems were significantly altered. The structure of the SOSD Met as operationalized through changes in the content of the strategy created a very different structural system in theory. Once the staff was hired, work started on the Academic Plan. The human-social system was transformed into a new structure through communication and the process of working together in the developmental part of the “plan” in May and June, 2009. The structure alters the technical core of the school and other processes and routines. This follows French and Bell’s generalization that “there is an immediate interrelated

impact between the human-social and the structural subsystems (p. 43). Lastly, French and Bell generalize, that whatever development the organization takes, external forces confront the organization.

This is demonstrated through several accounts. First, there was a loose compliance of some of the MOU conditions by SOSD Met. In Adair's view, there were a number of charter and public schools in the United States that lacked the experience and or the support base that the SOSD staff could draw from (A. Warren, Personal Communication, August 30, 2011). The resources of SOSD for administrative, curriculum, and logistical support were readily accessible. There then was little need for absolute compliance to the MOU. The service provided to the SOSD Met by BPL is supportive in clear and measurable ways. Interesting, the mid and year-end reports by BPL have not occurred. Instead, the SOSD Met follows division procedures outlined in Policy GBI: Professional Learning Framework (Appendix BB) (A. Warren, Personal Communication, August 30, 2011) as part of its process to evaluate the progress the school is making.

While SOSD was able to supply a vast resource base, BPL provided instrumental support in curriculum alignment (most notably with the Met Sacramento), mentoring, and providing access to print and non-print resources. Adair personally has continued to be in constant communication with the National Director of School and Network Support, of BPL. Further adding to this support network, Adair during her interviews commented on several occasions about the supportive environment in the division and the role that Howard and Brian played in assisting her.

In answer then to research question 1, my claim based on the evidence, is that the CLG and the Division made a rational choice in light of the goals and constraints posed by the environmental and organizational factors.

The Cognitive and Learning Lens Perspectives

The role of knowledge and experience that forms cognition and guides action of the principal helps to understand the nature of the passion, energy and commitment of the principal. The inclusion of an emergent leadership group that has a significant role in the school is integral not only to the AS-R Model but also in the implementation of the school as well. Evers and Lakomski (2000) maintain that educational and administrative practice is social practice in that it is “distributed between other knowers and their material contexts” (p. 37). The situated action perspective encompasses these two ideas and contributes to this discussion on principal and CLG action. This approach allows one to focus on how the principal and the advisors as part of the CLG display their cognition in interaction with others and in the physical- structural systems that comprise the Met school which in turn shape and change the actors’ cognitive behaviour. These coalesce into how the organization can effectively meet the challenges associated with starting up a new school and of implementing a radically different high school delivery program in the province. How the school went about achieving these ends in the face of complexity and uncertainty can be described as conforming to Argyris’ tacit theory-in use, which captures elements of organizational learning (Argyris, 1999) that enabled the creation of the Met. In Evers and Lakomski’s (2000) view, “it is a living example of distributed information processing and problem solving which embodies a variety of strategies of decomposition and coordination” (pp. 84-85).

In the area of cognition, there is a developmental shift, a change in the abstraction of high school education, where the emphasis has shifted from “education for all” to “one child at a time”. This accompanies a content shift at the same level of abstraction in how a high school education should be delivered, assessed, and credentialed.

Hutchins’ (1996) work on socially distributed cognitions of a ship’s crew (comprised of many groups) can be framed as communities of networks. The focus on organization “learning/functioning then becomes: how do the networks interact with each other, and do they interact differently” (Evers and Lakomski, 2000, p. 85), given the Met structure? Evers and Lakomski (2000) cite Hutchins’ (1991) findings from his simulation activity on the social organization of distributed cognition and these are directly applicable to decision-making in the SOSD Met. The decentralized structural arrangements such as the advisory system, implicitly improves group decision making by having divergent and rich information derived through the advisories and the principal.

Organization emerges through communication as described by Weick (2009) who cites Taylor and Van Every’s argument that “conversation is the site for organizational emergence and language is the textual surface from which organization is read. Thus, organizations are talked into existence locally and are read from the language produced there. The intertwining of text and conversation turns circumstances into a situation that is comprehensible and that can serve as a springboard for action” (p. 5). The loosely connected conversations and meetings held among the advisors and Adair collectively form patterns of understanding that are more complicated than any one person can replicate. Weick (2009) notes that this distributed organization does not know what it knows until “macro-actors” articulate it. In this instance, the articulation has come long before in the initial conversations that produced the first Met in Rhode Island. This is true to

a degree, as the Big Picture has been articulated, but each school must find its own path (G. Young, Interview, March 23, 2011). The ongoing conversations articulate what people have said and give voice to the collective leadership group and enabling communication paths and actors to “see what they have said, to understand what it might mean, and to learn who they might be” (Weick, 2009, p. 5).

The advisors and Adair as the CLG functioned within an organization of impermanence in Weick’s terms. Learning new patterns of behaviour and “mindful attention” as a way of keeping up with the changes characterizes the implementation process. Weick describes the anchors of sensemaking during times of organizational impermanence as involving the properties of doubt, information overload, enactment, and recurring processes. As Brian and Adair talked and took steps to bring the SOSD Met into existence, “they attend, interpret, act, and learn (Daft & Weick as cited in Weick, 2009, p. 8).

The organizational conditions allow for rich contextualized environments where principals manage “meaning” in an effort to achieve a sense of shared purpose. The process whereby a principal creates meaning and engages in sensemaking is a key organizational activity (Weick, 1995). When others are involved, as in the case of the three teacher advisors who comprise part of the CLG, “sensemaking is no longer an isolated activity by management but one of sensegiving where it is communicated, and used to influence both sensemaking and the behaviours of others” (p. 220).

Sensegiving is conceived within the acts of developing statements or activities such as developing mission statements. Sensegiving thus pertains to what the members of the CLG said as well as what they did. The development of the SOSD Met mission statement in June 2010

occurred after the first year of operation in order to make it meaningful for the staff (A. Warren, Personal Communication, August 30, 2011)

Instructional delivery was premised on a constructivist image of learning and aimed at the needs of individual students. The effort to ensure the achievement of Manitoba Education outcomes was addressed by the Academic Plan. In keeping with the BPL philosophy, expositions as part of authentic assessment still formed an integral part in the evaluation of students. The use of rubrics allowed for marks to be given and satisfied reporting requirements.

Based on the interviews with Adair, Brian, and Claudia, I conclude that leadership is a significant contributing factor to the development and implementation of the SOSD Met. An obvious example is Adair's dedication to the project and her ongoing motivation to advance the program. She was a phone call away, covered classes, and established cooperative and collaborative relationships with the community, GCC, the central office of SOSD. She possessed strong task oriented behaviours coupled with a deep seated sense of mission.

Frequently, action is the pretext for subsequent conversations and creates the "tests" that interpret the enacted event. In Weick's (2009) terms and that of sensemaking: "how can we know what we think (texts) until we see (listening) what we've done (conversing)?" (p. 5). The information on sensemaking can be directly applied to the process of responding to the challenge faced by the SOSD Met staff to determine students' marks in an authentic learning environment. A significant piece of a student's assessment in the year is through exposition. When looking at the expositions two questions came up in the conversations of the staff: "What does a 75% look like and what do *we* mean by publically excellent?" (Adair Warren, Interview, March 5, 2011). While not typical of a Met school, a percentage grade would assist in meeting accountability

concerns that Manitoba Education had early on in the discussions. The process would achieve rigor by determining the criteria for a passing grade and therefore whether or not the outcomes had been met.

Becoming publically excellent required a series of discussions among staff so as to develop a collective understanding of that concept. This link is demonstrated through the understanding of the idea that if cognition lies in the path of action, then texts and conversations lie in its path (Weick, 1995). Weick presents this under the umbrella of organizational importance. This results in advisors who have agency, through their ongoing dialogue, between the known and the unknown, through which events emerge. Adair spoke of the pragmatic necessity of getting the school ready for September opening (A. Warren, Interview, March 7, 2011). The process conveyed by Adair is that of a dynamic process in flux – a mix between known and unknowns. The Met, having no history, had no inertia of a typical high school. The momentum and energy had to come from Adair (Interview, Adair Warren, March 7, 2011). Much like the shifting of the desert sands, the landscape of the Met began to take shape. Clearly, a significant act was the completion of the Academic Plan as without it, the school could not grant credits and its existence would remain a non-entity. The Academic plan as well would serve as the anchor for the school as the program could demonstrate Achievement of GLOs and SLOs. The core curriculum would be the spine of the program on which to build the rest of the program. This action is foundational to future sensemaking of the CLG with respect to credit acquisition.

Adair promoted the program during high school information evenings with prospective students and parents and in the registration evening. Greg Young, two of his students, and Elliot Washor were utilized as well to convey what the Met program would be about. Adair felt the

process as supportive in the sense that parents, students and other staff asked “tough questions” (A. Warren, Interview, March 7, 2011). Ongoing discussions with Howie, her colleague in the administrative team at GCC, were critical as he was a constant source of feedback, encouragement, and support while at the school and after his departure (A. Warren, Interview, March 7, 2011).

There was a sense of pioneering but with the familiar elements as embodied in the recurring processes typical of a high school start up in September. These would have been mainly custodial: registration, timetabling regular classes like PE/HE for 9 and 10, organizing the parent-teacher information books, distributing student handbooks (BPL order), and implementing policies and procedures established by SOSD.

Weick makes the case that “emergent, continuous change forms the infrastructure that determines whether planned, episodic change will succeed or fail” (2009, p. 239). Strategies of rebalancing rather than strategies of unfreezing are factors in the SOSD Met as the advisors respond to student need on an individual basis. This structural feature sustains the changes and provides the momentum to evolve.

This momentum developed through the first year as envisioned by the staff along with their planning, reflected in the changes in the content of their strategy, set the stage to develop the mission statement. The formal and informal conversations amongst staff and their collective experience allowed them to develop their mission statement at the end of their first year of operation. In commenting on the timing of the development of the mission statement³⁷

³⁷ SOSD Met school Mission: The SOSD Met school provides a respectful, positive, and challenging learning environment where meaningful learning is linked to student passions and interests. Each student’s experience is centered on the goals that are relevant to the student and are connected to the real world. Our “One Student at a

Adair expressed this view: “You can’t come up with a mission until you have lived in the experience...that’s why we chose to leave it until the end of year one in June timed with Greg’s visit. (Adair Warren, Interview, March 7, 2011).

In answer to research question 2, my claim is based upon the evidence shown by the particular content of the strategy. In my view, five of the ten distinguishers of a Met school and the development of the SOSD Met Academic Plan, altered the content of the strategy. The outcome is the result of the actions by the collective leadership group, which were consistent with their interpretations of the environment and organizational contexts.

Recommendations

In the introduction to this research, I explained how I would apply the adapted version of the Rajagopalan-Spreitzer (1997) Multi-Lens Framework to show how this study was significant. This study has generated several broad research agendas that have implications for theory, research and practice

Recommendations for Theory

This study began as an exploratory study that sought to understand and describe school change and specifically second order change through changes in the content of the strategy for a high school. Taking advantage of the iterative, continuous nature afforded by qualitative methodology, I sought to understand how these groups of people were able to create the SOSD Met.

Through this investigation emerged the conclusion that changes in the content of the strategy matched the requirements of the school's external and internal contexts (Links 1 and 2) in order to become a Met inspired school. The rational lens perspective identified a critical component of the reality the principal and advisors faced, namely, in order to function as a Met inspired school, requirements in both the environmental and organizational contexts needed to be fulfilled. While the rational lens perspective explained this phenomenon, it does not explain why the changes in the content of the strategy manifested as they did. Different schools and divisions in the province respond through different strategies to increase graduation rates. The cognitive and learning lens perspectives afforded a deeper understanding, by adding to the rational lens perspective, because they helped me understand:

- (a) Why the SOSD moved toward a Met styled program in the way that it did, and
- (b) How actions of the SOSD staff aimed at the environmental and organizational forces brought about the specific strategy changes that created the SOSD Met.

Further, the integration of the three lenses considers the reality faced when engaged in a strategic change. Simply, plans do not unfold as conceived but require ongoing learning, adjustment and allow emergent or unplanned actions to develop. The plan does not occur in a linear, unidirectional way.

What do these results imply for the body of knowledge on school change?

First, the Rajagopalan-Spreitzer (1999) model has proven to be theoretically useful in examining strategic change in organizations. The findings support the conceptual and theoretical underpinnings of an Integrated Multi-Lens Framework that brought together content (as

demonstrated by the rational analysis) and process (as demonstrated by the cognitive-action analysis) schools of thought. The model is recommended for theoretical testing.

Second, the integrative approach to understanding strategic change presented a more completely specified model that allows for the further development of psychological and cognitive science elements in a model of school change. Further testing of the theoretical links between the environment and organizational contexts with principal, advisor/teacher cognitions and action would serve to strengthen the model or challenge it.

Third, the inclusion of the CLG was supported as their actions had a direct bearing on the content of the strategy and the implementation of the program. Further, distribution of leadership roles and responsibilities to teachers is a significant factor that speaks to the reality of a professionally oriented school and the effect it has on establishing organizational change. Whether this role expansion creates a professionally oriented school or not would further serve to assess the theoretical strength of the model.

Fourth, this study has contributed to the concept of radical change in that changes made in the content of the strategy reflect the magnitude of the strategic change. The intention is that change and the degree of change are more completely operationalized. Furthermore, by virtue of the change in the content of the strategy, the technical core of high school education transformed into a very different model and structure of education.

Fifth, this study has contributed to a more completely specified understanding of strategic change in organizations/high schools. The theoretical model employed is especially significant to other research dealing with the topic of school/organizational change. The ability to study

organizational change across different domains would enhance management, organizational change, and school change bodies of knowledge.

Finally, the Met concept itself presents as an alternative theoretical model of secondary schooling. After more than fifteen years of success in the United States, with some of the most disadvantaged students, the philosophy of Big Picture Learning is challenging the application of a common theory of education for all.

Recommendations for Research

First, the limited nature of this instrumental case study inhibits attempts to generalize findings to other sites. Therefore, research on other schools that have fundamentally changed their content strategy will deepen our understanding of radical organizational change. Further, I have only been able to tell part of the story in terms of organizational change. The primary focus of this study was on the content of the strategy and those forces that influenced the organizational strategy. The secondary yet imperative focus remains of how this affects student success. Defining success as indicated previously should involve far more than academic achievement. Therefore, follow up research of how successful students are in this program needs to be undertaken. While comparison to other school sites undergoing changes in their strategy, ongoing research into how the SOSD Met continues to evolve addresses the sustainability of the program. The impact of this research and the attempts to promote change beg the question – to what extent has high school changed, and has it mattered to student learning? The interest in the two parts of the question speaks to the very purpose of a public high school education. The scope of this study has focused on the first part of the question in addressing how a school changed the

approach to educating students in a radical way. Change in the content of the strategy occurred within a seven-month period.

Secondly, as stated in the previous paragraph, further research into change through the strategy choices of a school needs to be undertaken. The Adapted Rajagopalan and Spreitzer (1997) Multi-Lens Integrative Model provides a sound conceptual and theoretical model on which to develop further organizational change studies. As this study has identified certain agents and factors as being of influence in producing significant school change, development of other case studies might help to generalize further about strategic change by demonstrating conditions that favor or impede school change. Using the multi-lens framework – rational, cognitive, and learning – deepens our understanding of the actions of the principal. As in this case, the role of principal, which has a predominant place in school change literature, is central given the context of the environment and organization.

Thirdly, the evidence and expectations for a structure labeled under distributed leadership through a collective leadership group model is not normatively characterized, nor practiced widely within high schools. Educational leadership is highly political as a building capacity strategy. The SOSD Met school may serve as an example about distributed leadership and the utility of inclusion of a collective leadership group.

Fourthly, the conceptual framework for the CLG rests on situational cognitions distributed amongst a group of teachers, which shape action. Further investigation would seek to address the role of distributed cognition and actions in an organizational change endeavour.

Finally, researchers have an expanded integrated framework with specific research questions that directly identify a school change research agenda for the future.

Recommendations for Practice

This study's findings have several implications for practitioners in the field of education. This instrumental case study focused on a single organization: SOSD Met. However, the implications of the study apply to any school or school division contemplating strategic change.

First, defining school change as change in the content of the organization's strategy provides for a focused discussion that develops understanding about change efforts in the high school. The SOSD Met school represents a partial response to Fullan's call for examples "where a setting had been deliberately transformed from a previous state to a new one that represents clear improvement" (Fullan, 2007, p. 117). We have evidence of a transformed setting. Time and further study will decide if "clear improvement" is a characteristic of the SOSD Met.

Second, a recent environmental change was Manitoba Education's decision to have students remain in school until they are nineteen (Province of Manitoba, 2010). Such an environmental expectation should create considerable impact on the high school, as in effect, 20% of students leaving school would be required to remain. It is hard to imagine that forcing this group of young people to remain in an unchanged system will yield any positive results. Alternative programs that address this group present possible avenues for graduation, whether in the spirit of a Met school or other innovative program.

While attempts at large, whole school reforms through large-scale, whole designs are often problematic (Berends, Bodily, & Natarq Kirby, 2002), the Met concept appears to be successful. The evidence here points to the conclusion that teachers can lead as instigators of change. Regarding the organization of work in terms of form and function (system as bureaucracy or network) will depend on the will and skill of formal leaders. The provincial

anchor of public education is contained in the document *Success for All* and while it is philosophically commendable, it falls short of meeting the needs of 20% of students in Manitoba (*Manitoba Child Health Atlas*, 2004). How school divisions respond to this environmental change will have direct implications for high schools, their ability to embrace change, and more importantly for students and whether their graduation rates improve.

Third, the organization of the SOSD Met provides a different perspective from that of the ‘egg-carton structure’ (Spillane, Halverson, R. & Diamond, 2004) that can reinforce teacher isolation (Senge, et al., 2000) to one of interdependence within a collaborative professional community. How teaching is shaped by the dominant content of the strategy may undermine rather than promote change in addressing the 20% of the school population that are being underserved.

Fourth, “Who do we hire?” What is the role of collegial relationships in facilitating school change? The creation and sustainability of school change falls on those who lead the school improvement effort and are involved in staff selection or hiring. As Cranston (2010) suggests, “research into understanding effective teaching [as a function of situation] and the kinds of knowledge, skills, dispositions and affective attributes” may serve as an answer (p. 74).

Fifth, the degree, scope or magnitude of change has a bearing on how people behave. In the SOSD Met example, the school structure, routines and technical core of teaching have been altered. This does not allow for a reliance on traditional or typical teaching behaviours. In a system where a novel teaching practice is tried - does it become fully adopted or is there too much leeway to continue in the comfort of past practice?

Sixth, in terms of innovations, schools embarking on the journey need to have the support of division office, the ability then to market their idea and the on-site authority to address situations created by the change.

Seventh, for some, the issue of purchasing a foreign program (costly) and of contextualizing it within a local environment is a concern. Thrupp and Willmott (2003) do not view this as a concern but see the need to recognize the rise of the knowledge entrepreneur who buys and sells know how within the marketplace as an acceptable practice.

Finally, the challenges of implementing an innovation may be all too common as voiced by an Australian in the following excerpt:

The biggest problem for all schools, including Big Picture schools, is the progressive enforcement of centralized curriculum, not through compliance processes but through high stakes testing. Central authorities will increasingly use the results of external tests to drive accountability and to make judgments about the performance of schools and systems, and in many cases school funding and teacher salaries and progression. Even Big Picture schools in the USA have to place effective programs on hold while they subject students to drill and test routines. This was the subject of controversy within and between the Rhode Island schools around the time of the 2010 Big Bang. (Bonnor, 2011)

Conclusion

In conclusion, this study investigated and analyzed the change in a school's strategy to affect organizational change. Through the application of a qualitative research design using an instrumental case study approach, two research questions were explored using an adapted multi-

lens framework. The analysis of the data yielded understanding of the environmental and organizational forces that promoted change. The findings as reported support the combination of rational, cognitive, and learning perspectives offered through the multi-lens model developed by Rajagopalan and Spreitzer (1997). The inclusion of the CLG as part of the AR-S Model extended the model to school based groups that work and function together and extended the principal cognition and actions to this group as well. This adaptation of the model situates teachers in a distributed leadership context and builds school capacity.

Incremental change is ongoing in schools (Sackney, 2007), but many of these innovative steps are not systematic, substantial, or student centered. The research findings about school change are equivocal. In spite of Fullan's (2006) optimism as embodied in his book *Breakthrough*, schools persist in the structural form as they did at the turn of the 20th century.

To aid in school change, this case illustrates the importance of a framework of school change applied to a model of education that places the technical core of teaching at the center of the change strategy. The Met philosophy situates the student at the center of the enterprise and has been an alternative way of educating high school students for 15 years (Littky, 2004). The development of these schools around the world indicates that this organization type has a global context. The continued expansion of the Met program and the reported graduation and post-secondary school attendance rates of Met graduates provide indicators of an emergent trend on the impact of student learning with an organization remade. The ten distinguishers, encapsulated by the Met philosophy, with the mantra - "one student at a time, promote relationships, relevance, and rigor" (G. Young, Interview, March 23, 2011) are the signatures of this remade organization. These beliefs in education have driven a radically different technical core of

teaching that has created organization processes, routines, and structure not found in a typical high school.

These actions focused on being true to the Met philosophy as best they could and through the development of the Academic Plan, which allowed their students to meet graduation requirements of the Province. To conclude, the planning of the SOSD Met took place significantly in the mind of Adair and later in the minds of the CLG and later “implicitly in the context of their daily actions” (Mintzberg, 2009, p. 25). In stressing this point – the members of the CLG adopted particular actions because of the nature of the changes in the content of the strategy.

The multi-lens approach provides for a robust understanding of organizational change that occurred in this situation. Using the AR-S Model as the conceptual and theoretical framework confirmed the presence of learning and cognition perspectives as changes in the content of the strategy when changes are linked with principal and advisor cognitions/actions and by the CLG as shaped by environmental and organizational forces. Changing the content of the strategy radically altered the technical core of teaching and in so doing the entire structure and routines of the school. By changing the content of the strategy, organizational change was manifested. What remains unanswered is - by changing the content of the strategy of a school, does that improve graduation rates and for whom?

EPILOGUE

You plan and then you go live it.

- **Adair Warren, SOSD Met Principal (March 7, 2011)**

... So, Mrs. Warren, what got into your head and put the motivation behind it to make this all happen? See, you started something with my friends and me. I'm not sure that any of us will ever go back to being normal people. Especially after two years of incredible schooling.

I was known as a troublemaker in middle school, and spent quite a bit of time in the principal's office. I never really saw myself completing high school, let alone going on to further education. When I heard about this school, I was considering dropping out as soon as I was old enough. However, for whatever reason, I chose to try it, and it was the right decision for me.

Change has been a part of my life for the last two years and it has made all the difference in the world. For the first time, I felt a part of school, people cared about me – cared beyond whether I was getting good grades or not. This has opened my eyes to a whole different world here and outside of school. I have started to speak up in class and found that there are people outside of school that care about what I do as well. For a long time, I was afraid people would not accept me for who I was. I was used to being the “dumb kid” or the one who would not succeed.

My brother is amazed at how school has become important to me. He actually thinks I will graduate! There is so much more opportunity for me than I could have imagined. He has always been there for me. Now with school behind me as well, I really wonder what would have happened to me without all of your support. I am fortunate to have people in my life that believe

in me. At the Met, I have learned to make learning matter for me and apply those lessons to my life.

One of the most memorable events this past year was my exhibition on the science of acupuncture. My experience at the Physiotherapy clinic and the help that Barb, my mentor provided, really opened my eyes to different forms of medical treatments and has motivated me to stick with my schooling. As you know, I did very well in terms of my grade, but the two pages of comments from my mentor along with the three pages from my advisor told me people really listened and were interested in what I had to say. Even my brother wrote something. Having my classmates there as well for moral support did not hurt either.

I want to thank you and the staff for giving me the opportunity to shine. I do not think I would have made it in a regular school. I cannot wait to get back next fall.

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Appendix A

Big Picture School Philosophy and Design

Attachment A Big Picture School Philosophy and Design

A PHILOSOPHY OF PERSONALIZATION, A FAR-REACHING VISION, AND A UNIQUE DESIGN

Big Picture Schools are defined by their commitment to educate "One Student at a Time." Our schools are built around the recognition that each child has unique interests, needs, and abilities that the educational program must take into account. We believe that the key to achievement lies in fostering students' individual interests and encouraging their active participation in the learning process. Big Picture Schools focus on authentic learning in order to develop students' ability to apply knowledge and skills to real life experience and challenges.

Each Big Picture School has a small student population but is connected to a greater whole, both locally and nationally. Each small school is expected to grow and branch into multiple schools in a given district or region in two to four years. All Big Picture Schools will be electronically networked and will participate annually in our national conference.

Because of our philosophical commitment to interest-generated, real-world, personalized learning, Big Picture Schools have a markedly different structure than other high schools. These differences may necessitate waiver language, particularly around curriculum requirements and personnel regulations. Some circumstances may require the pursuit of charter status.

ESSENTIAL COMPONENTS AND ELEMENTS

Those who start Big Picture schools agree to follow the guiding philosophy of "One Student at a Time" by establishing a school with these essential components and elements:

1. **Learning in the real world.** The most important element of the education at a Big Picture School is that students learn in the real world. The main component of every student's education is the LTI (Learning Through Internship). In this minimum 10-12 hour, two-day-a-week internship with a mentor, an expert in the field of the student's interest, the students complete authentic projects (projects at internship sites that benefit the student and the mentor) with deep investigations. These projects are the main root to academic growth and investigation in the curriculum. These authentic projects are connected to the student's interests and needs and are "real to" or meet the needs of the mentors. Students have an LTI each year they are in school, unless in 12th grade their senior thesis project (the large, culminating independent real world project) encompasses the LTI.
2. **Personalization—One Student at a Time.** Learning at a Big Picture School is not constrained by the school day or the school year. Students are encouraged to pursue their interests and grow academically, and given credit for activities outside of the school day and the school year. One student at a time expands beyond "academic" work and involves looking at a student holistically. Every student's work is documented on an individual Learning Plan created and updated each quarter (or trimester) with the learning team (the student, parent, advisor, and whenever possible, mentor) in a Learning Plan meeting. The curriculum, learning environment, use of time during the school day, choice of workshops or college class, focus and depth of investigation in the Big Picture Learning Goals based on the student's individual interests, talents, and needs. Students with IEP's follow the same process, personalized to their needs. It involves "doing what's best for kids".

pushing and pulling at the right time, not dictating or punishing, but problem solving and mediating. Overall, the advisor's job is to know students well and provide the right measure of challenge and support for each student in each activity to promote growth. Students are responsible to follow their interests and passions in the real world and in their project work.

Five general learning goals provide a framework around which the student and advisor organize this customized plan. The learning goals are:

- Empirical reasoning – *How do I prove it?*
- Quantitative reasoning – *How do I measure, compare or represent it?*
- Social reasoning – *What are other people's perspectives on this?*
- Communication – *How do I take in and express ideas?*
- Personal qualities – *What do I bring to this process?*

3. **Authentic Assessment.** Learning at a Big Picture School is a process that is substantiated with quality products. There are high expectations for each student at Big Picture Schools. The criteria of assessment are individualized to the student and the real world standards of a project (as gauged by the mentor). Students engaged in this process at Big Picture Schools are not assessed by tests and are not given grades. The assessments at a Big Picture School include public exhibitions (one per quarter or trimester) that track growth, progress, and quality work in the learning plan and academic depth in the Learning Goals), weekly check-in meetings with advisors, weekly journals, yearly presentation portfolios, and transcripts (to translate the information in a way colleges can understand). Gateways for students' progress are between 10th and 11th grade and at graduation.

4. **School Organization.** Big Picture Schools use time, people, facilities/space, and other resources in unique ways. The organizing principle around Big Picture Schools is to educate one student at a time. In order to carry out our design each school serves no more than 130 students, with no more than 17 students (1:15 is strongly recommended) in an advisory. Students work in one-on-one and small group learning environments around their interests and needs both in and outside of school doing authentic work.

Big Picture Schools are organized around a culture of collaboration and communication that includes staff and school meetings, writing in the TGIF, scheduling school functions and events, and retreats. Each school is a small community of learning and is also part of a system of small schools in their locale and part of the network of Big Picture Schools. School facilities are small, personalized and are organized to facilitate the Big Picture programmatic design. This is reflected in the outside-in, inside-out design of the schools where real world learning occurs in the community and is also occurring in the schools. The design necessitates an interdependence between the school and the community

A Big Picture School cannot exist in a vacuum outside of the community. The core of the students' education is the LTI. As a result, the community plays an integral role in the educational success of the school.

5. **Advisory Structure.** The advisory structure is the core organizational and relational structure of a Big Picture School. It is the heart and soul of the school and is often described as the "home" and "second family" by students. All BP schools have a small number of students (goal of 15) with one advisor for a minimum of two years (preferably four).

The advisor's role is to manage the student's LTIs and individual, personalized Learning Plans. To do this, the advisor must get to know and build relationships with each student and his or her family (this includes home visits and one-on-one meetings with each student). Though certified in one area, the advisor does not "teach" his or her subject area; rather he or she draws on many disciplines to meet the needs of each student, their projects, and the advisory activities. Ultimately, the success of the student is the responsibility of the advisor.

The advisor also organizes the "advisory time" (the half-hour to hour-long meetings of the group) in the morning and the afternoon to meet the needs of the students. He or she facilitates the group activities that are designed to expose students to new ideas and concepts, provide academic learning opportunities, create a group identity and group process, and build a sense of belonging and trust in school and the educational process.

6. **School Culture.** School culture is not a means to an end, but an end in itself. One of the things that is striking about Big Picture Schools is the ease with which students interact with adults. There is culture of trust, respect, and equality between students and adults, as well among themselves. Students are encouraged to take leadership roles in the school and student voice is valued in decision making processes.

For the adults in Big Picture Schools, team work is a defining aspect of the culture. Principals create regular opportunities for professional development and life-long learning. Staff members also reflect regularly and share ideas through a weekly publication called TGIF. Additionally, staff members meet regularly in a variety of configurations (whole staff, grade level, buddies, etc.).

7. **Leadership.** In Big Picture Schools, leadership is shared and spread between a strong, visionary principal and a dedicated, responsible team of advisors. The community functions as a democracy.

Principal Leadership:

All BP principals will be trained by Big Picture staff through immersion. They are trained around BP principal leadership criteria as delineated in our materials through mentor/intern relationships with other Big Picture principals and coaches including: human relations and communication, moral courage, vision, flexibility and efficiency, life-long love of learning and leading, and public support. The principals participate in on-going year-round professional development by BP and are supported in the start-up years of operation by Big Picture. They are part of, and actively participate in, the Big Picture network of schools nationally and in their locale. Principals are both the BP cultural/instructional leaders and the CEOs/entrepreneurs for their schools. They are the liaisons to districts, Big Picture, and staff. Overall, the success of the whole school and the advisors in particular is the responsibility of the principal.

Advisor Leadership:

All advisors are trained by Big Picture-trained principals and supported, through the principal, with BP materials and coaching. Advisors take great responsibility in the day-to-day organization of the school, the successful managing of the school, successful implementation of the curriculum, and generally the success of students in the school. In addition to formal professional development, advisors learn from each other on a daily

basis; they serve as mentors and leaders to one another. Each year they talk about what they taught, passing down information from year to year. Much of the learning about how to be an advisor is done by interactions and the collegial relationship with other advisors, which results in a collaboration and a passing on of knowledge.

8. **Parent/Family Engagement and Adult Support.** Parents and families are an essential element of a Big Picture School from start up through everyday operation. They feel welcome and valued at a Big Picture school. Families are engaged around each one of their children by participating in Learning Plan meetings and exhibitions. Families are resources at these meetings for knowledge about their children as well as supporting the school community by suggesting mentoring possibilities and using their assets in ways that support the school. They play an active role in the school community that includes political issues, social gatherings, and supporting new parents and students. They get educated in playing a proactive role in the school life of their children through high school and out to college.
9. **School-College Partnership/College Preparation.** Big Picture Schools show deep faith in all students and work to make college an opportunity for all of their students in order to provide options for them in life. They plan backwards to maximize these opportunities: challenging individual learning plans, visits to colleges, educating families about the process, and building relationships with local colleges.

All students must take college entrance exams and apply to college or post-secondary school programs. In addition, Big Picture schools continue to follow and support their students even when they become alumni. Big Picture schools require and help students to create post-high school plans.

10. **Professional Development.** Professional development for advisors is done at each and every school by principals, other staff at the school, and by BP staff and coaches at staff meetings and retreats. Professional development is on-going both at the school and within the Big Picture network. Advisors participate in all BP professional development activities including an annual Big Bang conference, our TV workshops, and other Big Picture events at their locale.

ORGANIZATIONAL DESIGN

Though each Big Picture School has a small student population, the vision extends far beyond the building. Big Picture Schools are literally and figuratively networked to promote the philosophy of "one student at a time" and share best practices. Schools agree to use and contribute to development of Big Picture's school design materials, and staffs from all Big Picture Schools attend an annual retreat in the summer.

Principal. Each school is led by a principal whom local decision-makers select together with the Big Picture Company. It is highly desirable and intended that this principal comes on board full-time by August, one year prior to the school's opening. During the year before opening, this individual participates in Big Picture's leadership training, which includes consultation in Big Picture's philosophy and design and start-up issues. As part of the training, each principal develops a thorough learning plan that identifies leadership development needs and timelines the organizational development of the school.

Each Big Picture Center must organize an active Advisory Board that meets four to six times a year, giving guidance and support to the principals in the center. This Advisory Board should be in addition to any district-based school board.

Site-Based Decision-Making. Each Big Picture School needs considerable autonomy to fully implement the school's philosophy and design, as described in this document and in Big Picture's extensive materials. The principal, with board approval, must be able to hire, evaluate, and terminate staff as necessary. The principal must control allocation of the school's budget and have direct and easy access to funds.

Student Population. Big Picture Schools are designed to serve students of all abilities, interests, aspirations, and socio-economic backgrounds. Because of the individualized approach, Big Picture Schools can successfully meet the needs of all students, from the most severely at-risk to the highest achieving. Students must be recruited throughout the given district and selected by a lottery system to ensure that the school population reflects the demographics of the community as a whole.

Contract Language. Two basic tenets underlie staff contracts in Big Picture Schools: 1) trust, respect, and open communication characterize relations between the principal, teachers, and families; and 2) concern for the communal good guides all decisions. Staff members play an active role in site-based decision-making and must have ample opportunity for productive dialogue and problem-solving. Big Picture School staff are given full benefits, including retirement and health packages, and competitive salaries.

Advisors and other full-time staff at Big Picture Schools are considered salaried professionals whose responsibilities often extend beyond a traditional school day. Staff may be part of the local union, but contractual language waivers must be established to ensure that staff members have the flexibility necessary to implement the school's design.

Appendix B

MOU: Statement of Agreement Regarding the Establishment of Big Picture Schools



Attachment B MOU: Statement of Agreement Regarding the Establishment of Big Picture Schools

This statement sets forth the scope and substance of the agreement between _____ and Big Picture Learning to create one or more new, small high schools based on the Big Picture philosophy and design (Attachment A). The first school will open in the fall of _____.

The District will:

1. Appoint an administrator who will serve as a champion for the Big Picture School, facilitating its development and full implementation in a timely manner.
2. Plan and implement one or more schools incorporating the Big Picture school core components and elements.
3. Engage the faculty and staff in planning for the Big Picture School and the facility, where appropriate.
4. Engage the community in planning for the Big Picture School and the facility, where appropriate.
5. Provide funding for planning the new school(s).
6. Select, in collaboration with Big Picture Learning, and appoint a principal(s) for the new school(s). Pay the salary and benefits of the principal(s) during the planning year, pursuant to the district's pay scale.
7. Provide training and support to the principal(s) during the planning year and release principals to participate in Big Picture principal training.
8. Develop a detailed program design / implementation plan for the school(s).
9. Develop a comprehensive curriculum addressing Big Picture School learning goals and appropriate District academic standards.
10. Apply for waivers from traditional regulations that would impede the full implementation of the Big Picture school design.
11. Provide an appropriate facility for the school(s).
12. Invest the principal(s) with appropriate authority and responsibility for recruiting and hiring teachers and staff in accordance with district policy.
13. Employ a non-selective student recruitment and enrollment process.
14. Provide funding for the school(s) consistent with the District's school funding formula.
15. Provide student and school performance data to Big Picture Company.
16. Participate in the Big Picture annual peer performance review process.
17. Support the school's participation in the Big Picture Schools national network.

In working with the District to conduct these tasks, Big Picture reserves the right to:

1. Select, in collaboration with the District, a principal(s) for the new school(s).
2. Monitor the implementation of the core Big Picture Schools design components and elements.

To assist the District in carrying out these tasks, Big Picture will provide services as needed and requested by the district, including coaching and consulting, access to Big Picture Online, print materials, video conferencing, training and support, and conference/workshop attendance. Big Picture will develop and submit to the District a proposal and estimated budget for providing these and related services, and will enter into a contract with the District to provide such services.

Big Picture agrees that, during the term of this Agreement, the District shall have the right and license to call each school a "Big Picture School" and to otherwise use the name and trademark "Big Picture School" in such a manner as Big Picture shall approve in advance of any such use. All such use will be contingent on the district's faithful implementation of the core Big Picture design components and elements, as delineated in Attachment A.

This agreement will be reviewed annually and will be adjusted to reflect new needs and circumstances.

Limitation of Liability

Neither Big Picture or any of its directors, officers, agents or employees ("Big Picture Persons") shall be liable, responsible or accountable in damages to the District for or in connection with this Agreement, any of the materials and services provided hereunder by Big Picture Persons, or otherwise, except for acts or omissions constituting gross negligence or willful misconduct of such Big Picture Person.

Notices

Any notice required or permitted to be given under this Agreement shall be in writing and shall be sufficiently given and deemed effective when delivered personally, or transmitted by facsimile with transmission acknowledged, or deposited in the United States mail (certified) postage prepaid, addressed as follows:

If to Big Picture, addressed to: M.R. Pagano at Big Picture Company, 325 Public Street, Providence, RI 02905. Phone: 401-752-2604. Fax: 401-752-2602.

If to the District, addressed to:

Attention:

or to such other addresses as may be hereafter specified from time to time in a written notice given by such party. Both parties agree to acknowledge receipt of any notice delivered in person.

By signing this agreement, we understand and agree to the above-named actions.

Superintendent of Schools

Date

Elliot Washor
Co-Director, Big Picture Learning

Date

Dennis Littky
Co-Director, Big Picture Learning

Date

Appendix C

University of Manitoba Ethics Approval Certificate



CTC Building
208 - 194 Dafoe Road
Winnipeg, MB R3T 2N2
Fax (204) 269-7173
www.umanitoba.ca/research

APPROVAL CERTIFICATE

December 20, 2010

TO: Eric Dowsett (Advisor J. Stapleton)
Principal Investigator

FROM: Stan Straw, Chair *SS*
Education/Nursing Research Ethics Board (ENREB)

Re: Protocol #E2010:113
"Realizing Change in a Manitoba High School: A Multi-Lens
Perspective and Integrative Framework Explaining the Linkages
among Contexts, Agents, and Strategy"

Please be advised that your above-referenced protocol has received human ethics approval by the **Education/Nursing Research Ethics Board**, which is organized and operates according to the Tri-Council Policy Statement. This approval is valid for one year only.

Any significant changes of the protocol and/or informed consent form should be reported to the Human Ethics Secretariat in advance of implementation of such changes.

Please note:

- If you have funds pending human ethics approval, the auditor requires that you submit a copy of this Approval Certificate to the Office of Research Services, fax 261-0325 - please include the name of the funding agency and your UM Project number. This must be faxed before your account can be accessed.
- if you have received multi-year funding for this research, responsibility lies with you to apply for and obtain Renewal Approval at the expiry of the initial one-year approval; otherwise the account will be locked.

The Research Ethics Board requests a final report for your study (available at: http://umanitoba.ca/research/ors/ethics/ors_ethics_human_REB_forms_guidelines.html) in order to be in compliance with Tri-Council Guidelines.

Appendix D

Letter to Superintendent and School Board Requesting Informed Consent From People with Control Over Documents and Permission to Approach Staff

Letter head

Date

Address ---

Dear Mr. O’Leary and Members of the Seven Oaks School Board:

I am a doctoral student in the Faculty of Education, University of Manitoba, and presently engaged in completing the requirements for my dissertation research under the supervision of an advisory committee comprised of Dr. John Stapleton (advisor), Dr. Jon Young, and Dr. Dan Albas. The focus of my study is the development and implementation of the Met School as a case study in organizational change. Specifically, I am interested in the factors that promoted the development of such a unique school. My approach to this research topic will employ two methods of data collection – documentary analysis and individual interviews.

I am writing to request your consent to conduct research for a doctoral dissertation with the Met school and associated staff in your division. My proposed dissertation topic is: *Realizing Change in a Manitoba High School: A Multi-Lens Perspective and Integrative Framework Explaining the Linkages Among, Contexts, Agents, and Strategy*.

The research model I intend to use is a qualitative case study through which I seek comprehensive descriptions of those factors that supported or impeded the creation of the Met school. Through the participation of the Met school principal, staff, the superintendent of schools, and the principal of Garden City Collegiate along with other non-divisional respondents that were associated with the Met, I hope to understand the factors of school change processes as they reveal themselves through documentary analysis and interviews. **In total eight individuals have been identified for digitally recorded interviews lasting between 60-120 minutes. Six individuals are employed with your division and two are non divisional personal.** Participants will be asked to recall and to reflect upon their experience, situations, or events that are associated with the development of the Met school. Their participation will be voluntary and only after individual consent has been provided.

As researcher, in order to complete the documentary analysis, I request access to board minutes, briefing notes, the memorandum-of-understanding, and school/division information that bears on the decision to go ahead with the Met school. My access to these documents **will be consulted only on site and returned immediately after use. During the consultation of these documents I can** be supervised by a divisional employee should you desire this.

Because of the uniqueness of your institution, I will use its full name in the final report of the study rather than a pseudonym. I will include passages, sections, or entire documents that

pertain to the Met school. I will provide the Superintendent with the text of my reference to the remarks and manuscript context in which those remarks are presented so that he can decide whether or not to allow the remarks to be reported or referred to in the report of the study. Additionally, consistent with the ethical protocols with which I am bound to comply as a researcher, you would have the ability to discontinue your participation in the study at any time. **Following your request to no longer participate in the study, all of my notes and our recorded interview will be destroyed.**

I value the unique contribution that the Met staff, along with you and others involved in the school can make to my study. Based on my preliminary discussions with Mr. O'Leary and Ms. Warren and upon my review of the Met philosophy, I believe this study may have not only theoretical value with respect to school change but to the practice of educating our students at the high school level.

The Education Nursing Research Ethics Board (ENREB) of the University of Manitoba, has approved the procedures for this study. If you have any questions regarding this research, please contact me at 204-725-1196 or through e-mail at 37samuel@mts.net. You may also contact my advisor, Dr. John Stapleton (john_stapleton@umanitoba.ca) for further clarification or information.

At the conclusion of my dissertation work, I will provide the board with an executive summary of the findings.

I would appreciate your permission to conduct this research during the months of December, 2010 to March, 2011. Thank you for your consideration of this request. I look forward to your response.

Sincerely,

Eric Dowsett
Ph.D. Candidate
Faculty of Education, Office 430
University of Manitoba
Winnipeg, MB R3T 2N2
Phone: (204) 725-1196
E-mail: 37samuel@mts.net

Appendix E

Letter Requesting the Principal's Participation in Research Study on the Creation of the Met

Letter head

Date

Ms. Adair Warren, Principal Met school
Address –

Dear Ms. Warren:

I am a doctoral student in the Faculty of Education, University of Manitoba, and presently engaged in completing the requirements for my dissertation research under the supervision of an advisory committee comprised of Dr. John Stapleton (advisor), Dr. Jon Young, and Dr. Dan Albas. The focus of my study is the development and implementation of the Met School as a case study in organizational change. Specifically, I am interested in the factors that promoted the development of such a unique school. My approach to this research topic will employ two methods of data collection – documentary analysis and individual interviews.

I am writing to request your consent to conduct research for a doctoral dissertation within the Met school. My proposed dissertation topic is: *Realizing Change in a Manitoba High School: A Multi-Lens Perspective and Integrative Framework Explaining the Linkages Among, Contexts, Agents, and Strategy*.

The research model I intend to use is a qualitative case study through which I seek comprehensive descriptions of those factors that supported or impeded the creation of the Met school. Through your participation and that of the staff, I hope to understand the factors of school change processes as they reveal themselves through documentary analysis and interviews. Participants will be asked to recall and to reflect upon their experience, situations, or events that are associated with the development of the Met school. Their participation will be voluntary and only after individual consent has been provided.

As researcher, in order to complete the documentary analysis, I request access to school minutes, briefing notes, and school information that bears on the decision to go ahead with the Met school. My access to these documents **will be consulted only on site and returned immediately after use. During the consultation of these documents I can be supervised by a divisional employee should you desire this.**

I value the unique contribution that the Met staff, along with you and others involved in the school can make to my study. Based on my preliminary discussions with Mr. O'Leary, you, and upon my review of the Met philosophy, I believe this study may have not only theoretical value with respect to school change but to the practice of educating our students at the high school level.

Because of the uniqueness of your institution, I will use its full name in the final report of the study rather than a pseudonym. I will not include the entire transcript of the interview with you, but I would hope to use certain of your remarks or observations. When I cite these remarks in their literal expression or in paraphrase form and attribute those to you by name, position, office, or capacity, I will seek your formal permission to do so. Further, where I identify certain remarks or observations that will not want to have attributed to you personally, I will ask you to consider allowing me to cite such remarks or observations by attributing them to an “informed observer”, “participant in the deliberations”, or some other appropriate anonymous acknowledgement. In any case, I will provide you with the text of my reference to the remarks and manuscript context in which those remarks are presented so that you can decide whether or not you will allow the remarks to be reported or referred to in the report of the study, and if so, what form of attribution, personal or anonymous, you would authorize.

All of my notes, recordings, and interview transcripts will be kept in a safe in my home, and I will be the only person with access. Any typed documents will be stored on my computer and a back-up drive, and both will be protected with a password. The tapes and notes will be destroyed three years after the conclusion of the study.

The Education Nursing Research Ethics Board (ENREB), of the University of Manitoba, has approved the procedures for this study. If you have any questions regarding this research, please contact me at 204-725-1196 or through e-mail at 37samuel@mts.net. You may also contact my advisor, Dr. John Stapleton (john_stapleton@umanitoba.ca) for further clarification or information.

At the conclusion of my dissertation work, I will provide the school with an executive summary of the findings.

I would appreciate your permission to conduct this research during the months of October, 2010 to February, 2011. Thank you for your consideration of this request. I look forward to your response.

Sincerely,

Eric Dowsett
Ph.D. Candidate
Faculty of Education, Office 430
University of Manitoba
Winnipeg, MB R3T 2N2
Phone: (204) 725-1196
E-mail: 37samuel@mts.net

Appendix F

Letter Requesting Participation in Research Study on the Creation of the Met

Letterhead

Date

Address

Dear

Re: Request Participation in Research Study on the Creation of the Met School.

I am a doctoral student in the Faculty of Education, University of Manitoba, and presently engaged in completing the requirements for my dissertation research under the supervision of an advisory committee comprised of Dr. John Stapleton (advisor), Dr. Jon Young, and Dr. Dan Albas. The focus of my study is the development and implementation of the Met School as a case study in organizational change. Specifically, I am interested in the factors that promoted the development of such a unique school. My approach to this research topic will employ two methods of data collection – documentary analysis and individual interviews.

On the information derived from public documents and information, I have identified a number of individuals from whom I might seek information and opinion regarding this matter. You have been identified as such a person and I would sincerely appreciate your assistance. I would like to interview you. The interview would be between 60-120 minutes in length and digitally recorded. On the Response Sheet accompanying this letter I ask you to indicate the location of where you would like to be interviewed and the time that is suitable to you and your employer if the interview will occur during work hours. The location should be suitable to conduct the interview.

At no time will the entire transcript of the interview be used in the dissertation but it is my intention to be able to acknowledge certain remarks or observations by you as part of the final report of the study. Where these remarks are cited in their literal expression or in paraphrase and attributed directly to you, by name, position, office, or capacity, I will seek your formal approval to do so. Further, where I identify certain remarks or observations that you do not want attributed to you personally, I will ask you to consider allowing me to cite such remarks or observations by attributing them to an “informed observer”, participant in the deliberations”, or through some other appropriate anonymous acknowledgement. Regardless, you will be provided with the text of my reference to your remarks and the manuscript context in which those remarks are to be reported or referred to in the report of the study and, if so, what form of attribution, personal or anonymous, you would authorize. Additionally, consistent with the ethical protocols with which I am bound to comply as a researcher, you would have the ability to discontinue your participation in the study at any time. This can be done by simply contacting me at any stage of the study and by indicating you no longer wish to participate in the study. Following this request, all of my notes and our recorded interview will be destroyed.

Risks to the organizations and individuals who participate in the study are minimal but not non-existent. As organizations will be identified by name and as participants may be identified by name, you need to be aware of your own assumption of risk in that your remarks may be linked directly to you. Because of the uniqueness of your institution, I will use its full name in the final report of the study rather than a pseudonym. I will not include the entire transcript of the interview with you, but I would hope to use certain of your remarks or observations. When I cite these remarks in their literal expression or in paraphrase form and attribute those to you by name, position, office, or capacity, I will seek your formal permission to do so. Further, where I identify certain remarks or observations that will not want to have attributed to you personally, I will ask you to consider allowing me to cite such remarks or observations by attributing them to an “informed observer”, “participant in the deliberations”, or some other appropriate anonymous acknowledgement. In any case, I will provide you with the text of my reference to the remarks and manuscript context in which those remarks are presented so that you can decide whether or not you will allow the remarks to be reported or referred to in the report of the study, and if so, what form of attribution, personal or anonymous, you would authorize.

All of my notes, recordings, and interview transcripts will be kept in a safe in my home, and I will be the only person with access. Any typed documents will be stored on my computer and a back-up drive, and both will be protected with a password. The tapes and notes will be destroyed three years after the conclusion of the study.

The potential benefits of the study are significant. It will provide an account of a radical change effort in an educational system typically characterized by stability and incremental change, it offers the ability to field test and assess a theoretical model (Rajagopalan and Spreitzer, 1997) of change, and will outline a series of recommendations for the consideration of those scholarly and practicing communities interested in organizational change.

If you decide that you do not wish to be interviewed or to participate in the study, please know that no observations will be made, or conclusions drawn, as to that fact in the research report. Your decision regarding participation is completely voluntary.

Whether or not you choose to participate, I would ask that you please complete and return the attached Response Sheet. A stamped, self-addressed envelope is included. However, should you wish to contact me first, regarding any aspect of the study, I can be reached at 204-761-2378 or by e-mail (37samuel@mts.net); or you may contact the chair of my Doctoral Studies Committee, Dr. Stapleton through e-mail (john_stapleton@umanitoba.ca).

Once I receive the Response Sheet and your interview times, I will contact you to confirm our time and place. Enclosed are copies of the consent form. There will be two identical copies, one for your file and one for me. The letter of informed consent is only one part of informed consent. The form will provide you with background information about the study and what your participation will involve. Should you have any concerns or questions after reading the letter of consent, or require further information, not included here, do not hesitate to ask. Please take time to read this carefully and to understand any accompanying information.

If you are willing to grant permission to be a participant in my research, I ask you read and sign the enclosed Consent Form and return it to me with the Response Sheet for available interview times, in the self-addressed envelope.

Thank you for your consideration in this request along with your time.

Sincerely,

Eric Dowsett
Ph.D. Candidate
Faculty of Education, Office 430
University of Manitoba
Winnipeg, MB R3T 2N2
Phone: (204) 725-1196
E-mail: 37samuel@mts.net

Enclosures

Appendix G

Letter of Informed Consent

Letterhead

LETTER OF INFORMED CONSENT

Title of Research Project: *Realizing Change in a Manitoba High School: A Multi-Lens Perspective and Integrative Framework Explaining the Linkages Among, Contexts, Agents, and Strategy.*

Researcher: Eric S. Dowsett, PhD Candidate, Faculty of Education, University of Manitoba

The Consent Form: This consent form, a copy of which will be left with you for your records and reference, is only part of the process of informed consent. It should give you the basic idea of what the research is about and what your participation will involve. If you would like more detail about something mentioned here, or information not included here, you should feel free to ask. Please take the time to read this carefully and to understand any accompanying information. Your participation in this study is voluntary.

Purposes of the Research Project: The research model I intend to use is a qualitative case study through which I seek comprehensive depictions or descriptions of those factors that supported or impeded the creation of the Met school. Through the participation of the Met school principal, staff, the superintendent of schools, and the principal of Garden City Collegiate, I hope to understand the factors of school change processes as they reveal themselves through documentary analysis and interviews. Participants will be asked to recall and to reflect upon their experience, situations, or events that are associated with the development of the Met school.

Procedures Involving Participants: If you agree to participate in the study, you will be interviewed by the researcher Eric Dowsett for approximately one hour. The time and place of the interview will be arranged through mutual agreement with the priority given to your own circumstance. During the interview, I will ask you questions pertaining to the challenges and opportunities faced in the creation of the MET school. People invited to participate in the study include the superintendent of schools, the MET principal, the MET advisors, the BPL mentor, the principal of Garden City Collegiate, and a government official and other individuals identified as knowledgeable about your school.

Recording and Transcription: I will digitally audio record the interview, and either I or a paid transcriptionist will do the transcription.

Confidentiality of Information: Because of the uniqueness of your institution, I will use its full name in the final report of the study rather than a pseudonym. I will not include the entire transcript of the interview with you, but I would hope to use certain of your remarks or observations. When I cite these remarks in their literal expression or in paraphrase form and attribute those to you by name, position, office, or capacity, I will seek your formal permission to

do so. Further, where I identify certain remarks or observations that will not want to have attributed to you personally, I will ask you to consider allowing me to cite such remarks or observations by attributing them to an “informed observer”, “participant in the deliberations”, or some other appropriate anonymous acknowledgement. In any case, I will provide you with the text of my reference to the remarks and manuscript context in which those remarks are presented so that you can decide whether or not you will allow the remarks to be reported or referred to in the report of the study, and if so, what form of attribution, personal or anonymous, you would authorize.

All of my notes, recordings, and interview transcripts will be kept in a safe in my home, and I will be the only person with access. Any typed documents will be stored on my computer and a back-up drive, and both will be protected with a password. The tapes and notes will be destroyed three years after the conclusion of the study.

General Comments: Your signature on this form indicates that you have understood to your satisfaction the information regarding participation in the research project and agree to participate as a subject. In no ways does this waive your legal rights nor release the researcher or involved institution from their legal and professional responsibilities.

You are free to withdraw from the study at any time, and/or refrain from answering any questions you prefer to omit, without prejudice or consequence by simply contacting me at any stage of the study and by indicating that you no longer wish to participate in the study. Following this request, all of my notes and out recorded interview will be destroyed.

Your continued participation should be as informed as your initial consent, so you should feel free to ask for clarification or new information throughout your participation.

Researcher’s Contact Information:

Eric Dowsett
Tel: (204-725-1196) or
E-mail: 37samuel@mts.net
Fax: 204-727-3595

The education/Nursing Research Ethics board had approved this research. If you have any concerns or complaints about this project you may contact the above named person or the Human Ethics Secretariat at 204-474-7122, or e-mail: Margaret_bowman@umanitoba.ca.

Feedback: Information gathered in this research study may be incorporated and quotes from these interviews in my research report, but only for academic purposes and after participants have had the opportunity to vet the verbatim raw data included in the text. I also may use this information in professional articles, conference papers, or other publications in the future.

- ☐ If you would like to have access to a copy of the summary findings of this research project upon its completion, you may do so by checking the box preceding this message and including a mailing address below.

Participant's mailing address:

Address: _____

City/Postal Code _____

Acknowledgement: *I am aware that both my name and my position will be used in the reporting of the data and that there is no guarantee of anonymity or confidentiality:* ☐ *yes* ☐ *no*

Participant's Signature: _____ Date: _____

Researcher's signature: _____ Date: _____

Appendix H

Response to Request to be Interviewed

Letter head

Please return this sheet at your earliest convenience in the *stamped, self-addressed envelope* provided.

Respondent's Name: _____

Phone No. _____

E-mail: _____

Please respond with a check (✓) as appropriate.

- a. ____ I would be available for an interview. The following times, dates, and locations are most convenient for me:

_____ on _____ at _____
Time Date Location

_____ on _____ at _____
Time Date Location

_____ on _____ at _____
Time Date Location

One of these dates will be confirmed with you in advance.

- b. ____ I would like an opportunity to talk to you and/or Dr. Stapleton about the study. Please contact me again for this purpose.

- c. ____ I will not be available for an interview.

- d. ____ I suggest that you might also contact the following person(s):

Name _____ Phone No. _____

Address _____

Name _____ Phone No. _____

Address _____

Thank you for your assistance with this research project.

Eric Dowsett

Appendix I

Interview Questions for Principal of Met

INTERVIEW GUIDE – REALIZING CHANGE

ELITE INTERVIEWS: COLLECTIVE LEADERSHIP GROUP/PRINCIPAL

Preamble

“My name is Eric Dowsett and I am a Ph.D. student in the Department of Educational Administration and Foundations at the University of Manitoba. I would like to explore some questions about the topic of school change and your role in and observations about the formation of the Met school. I am also am interested in how people within the school and outside of the school influenced or created strategies to implement the Met school in your division. The questions are open-ended, so that you can say whatever you think, or say as much as you wish. There are no ‘right’ or ‘wrong’ answers. It is important that I hear what your perceptions and thoughts are on this matter. As I have already indicated, your participation is voluntary and your particular answers can, at your choosing, be attributed to you, to some anonymous acknowledgement, or not used at all. I will digitally record this interview in order to ensure accuracy when I later review and analyze your responses.

Do you have any questions?”

“Alright. Let us begin.”

Consent

1. Witness signature on the consent form and collect one. (For face-to-face interviews, obtain confirming response. For telephone interviews, read informed consent form and state date and time.)

Interview

2. For the record, please state your name, current position, duties and responsibilities in the Met school.
3. What kinds of experiences have you had with teaching at the high school level? (number of years, types of schools, subjects taught, positions held)
 - a. Probe: How did you find this experience to be?
 - b. Probe: What views do you hold about how public education is delivered in Manitoba?

4. Please tell me the way that you were recruited for the school?
 - a. Probe: What directions were you given one hired?
 - b. Probe: What were your initial expectations that you had coming into the school?
 - c. Probe: Where any written instructions provided to you with respect to the job?
5. Please tell me about your thoughts, experiences and involvement with the development of the Met school. (role, duties, teaching philosophy)
 - a. Probe: How prepared were you for this new school?
6. Please describe your involvement in the process of creating the Met school.
 - a. Aid: provide time line (attached)
7. Was a plan developed and followed to achieve the Met school?
 - a. Probe: How was the plan developed?
 - b. Probe: What surprises were encountered?
 - c. Probe: Where any parts of the plan abandoned or altered?
 - d. Probe: Is there anything you would like to go back to and do over?
8. During the process of working together to create the Met, what were some of the challenges that stand out in your memory?
 - a. Probe: in cases of interpersonal conflict – how were these resolved?
 - b. Probe: in cases of broad issues – how were these resolved?
 - c. Probe: in cases of intrapersonal conflict – how were these resolved?
9. Please describe the influences, pressures, demands or expectations you were aware of in terms of creating the Met.
 - a. Probe: within the school itself.
 - b. Probe: from outside of the school.
 - c. Probe: from within yourself.
 - d. Probe: from your colleagues.
 - e. Probe: from the administration.
10. In terms of your own learning, which sources of feedback have been the most influential for you to take action on?
11. How would you describe the management of the school and your role during the first year of operation?
12. Please explain the determining factors behind the decision to develop the school in the way you did.
 - a. Probe: advisory system
 - b. Probe: internship

- c. Probe: authentic assessment
 - d. Probe: parent involvement
 - e. Probe: individual learning
13. What have you learned through this experience?
14. Is there anything you would like to add?

Debrief

“This concludes the interview. Thank you for your participation. Again, the purpose of my study is to explain the relationships between the context of the school, the agents and strategy of the school and how the theories of organizational change might apply. Your participation in this study and the information you have provided has been very useful and is sincerely appreciated. Please contact my advisor, Dr. John Stapleton, or me, using the information of the copy of the consent form that has been provided to you, if you have any questions or comments about this study.”

Eric S. Dowsett
Ph.D.Candidate
Faculty of Education
University of Manitoba
Winnipeg, MB R3T 2N2
Phone: (204) 725-1196
E-mail: 37samuel@mts.net

Appendix J

Interview Questions for Collective Leadership Group

INTERVIEW GUIDE – REALIZING CHANGE

ELITE INTERVIEWS: COLLECTIVE LEADERSHIP GROUP/ADVISOR

Preamble

“My name is Eric Dowsett and I am a Ph.D. student in the Department of Educational Administration and Foundations at the University of Manitoba. I would like to explore some questions about the topic of school change and your role in and observations about the formation of the Met school. I am also am interested in how people within the school and outside of the school influenced or created strategies to implement the Met school in your division. The questions are open-ended, so that you can say whatever you think, or say as much as you wish. There are no ‘right’ or ‘wrong’ answers. It is important that I hear what your perceptions and thoughts are on this matter. As I have already indicated, your participation is voluntary and your particular answers can, at your choosing, be attributed to you, to some anonymous acknowledgement, or not used at all. I will digitally record this interview in order to ensure accuracy when I later review and analyze your responses.

Do you have any questions?”

“Alright. Let us begin.”

Consent

1. Witness signature on the consent form and collect one. (For face-to-face interviews, obtain confirming response. For telephone interviews, read informed consent form and state date and time.)

Interview

2. For the record, please state your name, current position, duties and responsibilities in the Met school.
3. What kinds of experiences have you had with teaching at the high school level? (number of years, types of schools, subjects taught, positions held)
 - a. Probe: How did you find this experience to be?
 - b. Probe: What views do you hold about how public education is delivered in Manitoba?

4. Please tell me the way that you were recruited for the school?
 - a. Probe: What directions were you given one hired?
 - b. Probe: What were your initial expectations that you had coming into the school?
 - c. Probe: Where any written instructions provided to you with respect to the job?
5. Please tell me about your thoughts, experiences and involvement with the development of the Met school. (role, duties, teaching philosophy)
 - a. Probe: How prepared were you for this new school?
6. Please describe your involvement in the process of creating the Met school.
 - a. Aid: provide time line (attached)
7. Was a plan developed and followed to achieve the Met school?
 - a. Probe: How was the plan developed?
 - b. Probe: What surprises were encountered?
 - c. Probe: Where any parts of the plan abandoned or altered?
 - d. Probe: Is there anything you would like to go back to and do over?
8. During the process of working together to create the Met, what were some of the challenges that stand out in your memory?
 - a. Probe: in cases of interpersonal conflict – how were these resolved?
 - b. Probe: in cases of broad issues – how were these resolved?
 - c. Probe: in cases of intrapersonal conflict – how were these resolved?
9. Please describe the influences, pressures, demands or expectations you were aware of in terms of creating the Met.
 - a. Probe: within the school itself.
 - b. Probe: from outside of the school.
 - c. Probe: from within yourself.
 - d. Probe: from your colleagues.
 - e. Probe: from the administration.
10. In terms of your own learning, which sources of feedback have been the most influential for you to take action on?
11. How would you describe the management of the school and your role during the first year of operation?

12. Please explain the determining factors behind the decision to develop the school in the way you did.
- a. Probe: advisory system
 - b. Probe: internship
 - c. Probe: authentic assessment
 - d. Probe: parent involvement
 - e. Probe: individual learning
13. What have you learned through this experience?
14. Is there anything you would like to add?

Debrief

“This concludes the interview. Thank you for your participation. Again, the purpose of my study is to explain the relationships between the context of the school, the agents and strategy of the school and how the theories of organizational change might apply. Your participation in this study and the information you have provided has been very useful and is sincerely appreciated. Please contact my advisor, Dr. John Stapleton, or me, using the information of the copy of the consent form that has been provided to you, if you have any questions or comments about this study.”

Eric S. Dowsett
Ph.D. Candidate
Faculty of Education
University of Manitoba
Winnipeg, MB R3T 2N2
Phone: (204) 725-1196
E-mail: 37samuel@mts.net

Appendix K

Interview Questions for BPL Mentor

INTERVIEW GUIDE – REALIZING CHANGE

ELITE INTERVIEWS: BPL MENTOR

Preamble

“My name is Eric Dowsett and I am a Ph.D. student in the Department of Educational Administration and Foundations at the University of Manitoba. I would like to explore some questions about the topic of school change and your role in and observations about the formation of the Met school. I am also am interested in how people within the school and outside of the school influenced or created strategies to implement the Met school in your division. The questions are open-ended, so that you can say whatever you think, or say as much as you wish. There are no ‘right’ or ‘wrong’ answers. It is important that I hear what your perceptions and thoughts are on this matter. As I have already indicated, your participation is voluntary and your particular answers can, at your choosing, be attributed to you, to some anonymous acknowledgement, or not used at all. I will digitally record this interview in order to ensure accuracy when I later review and analyze your responses.

Do you have any questions?”

“Alright. Let us begin.”

Consent

1. Witness signature on the consent form and collect one copy. (For face-to-face interviews. For telephone interviews, read informed consent form and state date and time.)

Interview

2. For the record, please state your name, current position, duties and responsibilities with the Met school.
3. What kinds of experiences have you had with teaching at the high school level? (number of years, types of schools, subjects taught, positions held)
 - a. Probe: How did you find this experience to be?
 - b. Probe: What views do you hold about how public education is delivered in North America/ the United States?

- c. Probe: Please tell me how you were recruited for the job of mentor.
4. Please tell me about your thoughts, experiences and involvement with the development of the Met school. (role, duties, teaching philosophy)
 - a. Probe: How prepared were the people you worked with for this new school?
 5. In your current role with the school, what types of decisions and problem solving do you come up against?
 - a. Probe: What activities have been the most challenging?
 6. Please describe your involvement in the process of creating the Met school.
 - a. Aid: provide time line (attached)
 7. During the process of working together to create the Met, what were some of the challenges that stand out in your memory?
 - a. Probe: in cases of interpersonal conflict – how were these resolved?
 - b. Probe: in cases of broad issues – how were these resolved?
 - c. Probe: in cases of intrapersonal conflict – how were these resolved?
 8. Please describe the influences, pressures, demands or expectations you were aware of in terms of creating the Met.
 - a. Probe: within the school itself.
 - b. Probe: from outside of the school.
 - c. Probe: from within yourself.
 - d. Probe: from your colleagues.
 - e. Probe: from the administration.
 9. How would you describe the management of the school and your role in the first year of operation?
 10. Please explain what the determining factors behind the decisions on the various school features (advisory system, learning through internship, personalized education, parental involvement, and authentic assessment) were.
 11. Was a plan developed and followed to achieve the Met school?
 - a. Probe: How was the plan developed?
 - b. Probe: What surprises were encountered?
 - c. Probe: Where any parts of the plan abandoned or altered?
 - d. Probe: Is there anything you would like to go back to and do over?

12. Have any Met schools failed?
 - a. Probe: What challenges typically face the development of a Met school?
 - b. Probe: How does your experience here compare with other schools you mentor?
 - c. How similar were the challenges here to other sites you have worked with?
13. What have you learned through this experience?
14. Is there anything you would like to add?

Debrief

“This concludes the interview. Thank you for your participation. Again, the purpose of my study is to explain the relationships between the context of the school, the agents and strategy of the school and how the theories of organizational change might apply. Your participation in this study and the information you have provided has been very useful and is sincerely appreciated. Please contact my advisor, Dr. John Stapleton, or me, using the information of the copy of the consent form that has been provided to you, if you have any questions or comments about this study.”

Eric S. Dowsett
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Appendix L

Interview Questions for Principal of Host School

INTERVIEW GUIDE – REALIZING CHANGE

ELITE INTERVIEWS: HOST PRINCIPAL

Preamble

“My name is Eric Dowsett and I am a Ph.D. student in the Department of Educational Administration and Foundations at the University of Manitoba. I would like to explore some questions about the topic of school change and your role in and observations about the formation of the Met school. I am also am interested in how people within the school and outside of the school influenced or created strategies to implement the Met school in your division. The questions are open-ended, so that you can say whatever you think, or say as much as you wish. There are no ‘right’ or ‘wrong’ answers. It is important that I hear what your perceptions and thoughts are on this matter. As I have already indicated, your participation is voluntary and your particular answers can, at your choosing, be attributed to you, to some anonymous acknowledgement, or not used at all. I will digitally record this interview in order to ensure accuracy when I later review and analyze your responses.

Do you have any questions?”

“Alright. Let us begin.”

Consent

1. Witness signature on the consent form and collect one copy. (For face-to-face interviews. For telephone interviews, read informed consent form and state date and time.)

Interview

2. For the record, please state your name, current position, duties and responsibilities with the Met school.
3. What kinds of experiences have you had with teaching at the high school level? (number of years, types of schools, subjects taught, positions held)
 - a. Probe: How did you find this experience to be?

- b. Probe: What views do you hold about how public education is delivered in Manitoba?
- 4. Please tell me about your thoughts, experiences and involvement with the development of the Met school. (role, duties, teaching philosophy)
 - a. Probe: How has the presence of this school affected your building?
- 5. Please describe the influences, pressures, demands or expectations you were aware of in terms of creating the Met.
 - a. Probe: within the school itself.
 - b. Probe: from outside of the school.
 - c. Probe: from within yourself.
 - d. Probe: from your colleagues.
 - e. Probe: from the administration.
- 6. Please describe your involvement in the process of creating the Met school.
 - a. Aid: provide time line (attached)
 - b. Probe: What information/directions were you given by the superintendent?
 - c. Probe: What was your role in developing, selling, and implementing the concept?
 - d. Probe: What is your view of the unique features of the school?
 - e. Probe: Were you concerned about any potential problems the Met would create for your school? How did you make these known?
- 7. During the process of working together to create the Met, what were some of the challenges that stand out in your memory?
 - a. Probe: in cases of interpersonal conflict – how were these resolved?
 - b. Probe: in cases of broad issues – how were these resolved?
 - c. Probe: in cases of intrapersonal conflict – how were these resolved?
- 8. Was a plan developed and followed to achieve the Met school?
 - a. Probe: How was the plan developed?
 - b. Probe: What surprises were encountered?
 - c. Probe: Where any parts of the plan abandoned or altered?
 - d. Probe: Is there anything you would like to go back to and do over?
- 9. What have you learned through this experience?
- 10. Is there anything you would like to add?

Debrief

“This concludes the interview. Thank you for your participation. Again, the purpose of my study is to explain the relationships between the context of the school, the agents and strategy of the school and how the theories of organizational change might apply. Your participation in this study and the information you have provided has been very useful and is sincerely appreciated. Please contact my advisor, Dr. John Stapleton, or me, using the information of the copy of the consent form that has been provided to you, if you have any questions or comments about this study.”

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E-mail: 37samuel@mts.net

Appendix M

Interview Questions for Government Official

INTERVIEW GUIDE – REALIZING CHANGE

ELITE INTERVIEWS: GOVERNMENT OFFICIAL

Preamble

“My name is Eric Dowsett and I am a Ph.D. student in the Department of Educational Administration and Foundations at the University of Manitoba. I would like to explore some questions about the topic of school change and your role in and observations about the formation of the Met school. I am also am interested in how people within the school and outside of the school influenced or created strategies to implement the Met school in your division. The questions are open-ended, so that you can say whatever you think, or say as much as you wish. There are no ‘right’ or ‘wrong’ answers. It is important that I hear what your perceptions and thoughts are on this matter. As I have already indicated, your participation is voluntary and your particular answers can, at your choosing, be attributed to you, to some anonymous acknowledgement, or not used at all. I will digitally record this interview in order to ensure accuracy when I later review and analyze your responses.

Do you have any questions?”

“Alright. Let us begin.”

Consent

11. Witness signature on the consent form and collect one copy. (For face-to-face interviews. For telephone interviews, read informed consent form and state date and time.)

Interview

12. For the record, please state your name, current position, duties and responsibilities in relation to the Met school and Manitoba schools in general.
13. What kinds of experiences have you had working with innovation at the high school level? (number of years, types of innovations, outcomes)
 - a. Probe: How did you find this experience to be?
 - b. Probe: What views do you hold about how public education is delivered in Manitoba?
 - c. Probe: Is this type of innovation, something that should be encouraged in Manitoba? Please explain.

- d. Probe: What changes were required to accommodate the way students are assessed?
14. Please describe your involvement in the process of creating the Met school.
- a. Aid: provide time line (attached)
 - b. Probe: Was there an official role for you or the government in this process?
 - c. Probe: How would you describe the Government's view on school innovation?
15. During the process of working together to create the Met, what were some of the challenges that stand out in your memory?
- a. Probe: in cases of interpersonal conflict – how were these resolved?
 - b. Probe: in cases of broad issues – how were these resolved?
 - c. Probe: in cases of intrapersonal conflict – how were these resolved?
16. Please describe the influences, pressures, demands or expectations you were aware of in terms of creating the Met.
- a. Probe: within the school itself.
 - b. Probe: from outside of the school.
 - c. Probe: from within yourself.
 - d. Probe: from your colleagues.
 - e. Probe: from the administration.
17. What have you learned through this experience?
18. Is there anything you would like to add?

Debrief

“This concludes the interview. Thank you for your participation. Again, the purpose of my study is to explain the relationships between the context of the school, the agents and strategy of the school and how the theories of organizational change might apply. Your participation in this study and the information you have provided has been very useful and is sincerely appreciated. Please contact my advisor, Dr. John Stapleton, or me, using the information of the copy of the consent form that has been provided to you, if you have any questions or comments about this study.”

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 E-mail: 37samuel@mts.net

Appendix N

Interview Questions for Superintendent

INTERVIEW GUIDE – REALIZING CHANGE

ELITE INTERVIEWS: SUPERINTENDENT OF SCHOOLS

Preamble

“My name is Eric Dowsett and I am a Ph.D. student in the Department of Educational Administration and Foundations at the University of Manitoba. I would like to explore some questions about the topic of school change and your role in and observations about the formation of the Met school. I am also am interested in how people within the school and outside of the school influenced or created strategies to implement the Met school in your division. The questions are open-ended, so that you can say whatever you think, or say as much as you wish. There are no ‘right’ or ‘wrong’ answers. It is important that I hear what your perceptions and thoughts are on this matter. As I have already indicated, your participation is voluntary and your particular answers can, at your choosing, be attributed to you, to some anonymous acknowledgement, or not used at all. I will digitally record this interview in order to ensure accuracy when I later review and analyze your responses.

Do you have any questions?”

“Alright, let us begin.”

Consent

1. Witness signature on the consent form and collect one. (For face-to-face interviews, obtain confirming response. For telephone interviews, read informed consent form and state date and time.)

Interview

2. For the record, please state your name, current position, duties and responsibilities with the Met school.
3. What kinds of experiences have you had with teaching at the high school level? (number of years, types of schools, subjects taught, positions held)
 - a. Probe: How did you find this experience to be?
 - b. Probe: What views do you hold about how public education is delivered in Manitoba?

4. Please tell me the way that you became aware of the Met school concept.
 - a. Probe: What was it about this one that set it apart from other innovative designs?
 - b. Probe: What were your initial expectations that you had coming into the development of the school?
5. Please tell me about your thoughts, experiences and involvement with the development of the Met school. (role, duties, teaching philosophy)
 - a. Probe: How prepared were you for the development of this new school?
 - b. Probe: Where you required to intervene in the development process?
 - c. Probe: How detailed were your instructions to the principal and staff of the Met?
 - d. Aid: provide time line (attached)
6. Was a plan developed and followed to achieve the Met school?
 - a. Probe: How was the plan developed?
 - b. Probe: What surprises were encountered?
 - c. Probe: Where any parts of the plan abandoned or altered?
 - d. Probe: Is there anything you would like to go back to and do over?
7. During the process of working together to create the Met, what were some of the challenges that stand out in your memory?
 - a. Probe: in cases of interpersonal conflict – how were these resolved?
 - b. Probe: in cases of broad issues – how were these resolved?
 - c. Probe: in cases of intrapersonal conflict – how were these resolved?
8. Please describe the influences, pressures, demands or expectations you were aware of in terms of creating the Met.
 - a. Probe: within the school itself.
 - b. Probe: from outside of the school.
 - c. Probe: from within yourself.
 - d. Probe: from your colleagues.
 - e. Probe: from the administration.
9. How would you describe the management of the school and your role during the first year of operation?
10. Please explain the determining factors behind the decision to develop the school in the way you did.
 - a. Probe: advisory system
 - b. Probe: internship
 - c. Probe: authentic assessment
 - d. Probe: parent involvement

- e. Probe: individual learning
- 11. In the event we run short of time – May I come and meet with you again?
- 12. What have you learned through this experience?
- 13. Is there anything you would like to add?

Debrief

“This concludes the interview. Thank you for your participation. Again, the purpose of my study is to explain the relationships between the context of the school, the agents and strategy of the school and how the theories of organizational change might apply. Your participation in this study and the information you have provided has been very useful and is sincerely appreciated. Please contact my advisor, Dr. John Stapleton, or me, using the information of the copy of the consent form that has been provided to you, if you have any questions or comments about this study.”

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Appendix O

Aid: Timeline

INTERVIEW GUIDE – REALIZING CHANGE

AID: TIMELINE

January 2009	Met presentation to division personnel
February 2009	Appointment of Met Coordinator
March 2009	Open Houses; Student Registration; Job Posting
April 2009	Candidate interviews
May 2009	Staff appointed and visitation to Met schools in Sacramento
May 2009	Staff commences work on Academic Plan
June 2009	Work on Academic Plan
August 2009	BPL Summer conference
September 2009	School start up
November 2009	Reporting Session
December 2009	
January 2010	Reporting Session
April 2010	Reporting Session Student Registration
May 2010	
June 2010	Creation of Mission statement Year end Reporting Session
August 2010	BPL Summer conference
September 2010	School start up

Met School Educational Calaendar

Met School Educational Calendar

3 weeks
22-37

	September	October	November	December	January	February	March	April	May	June
Who Am I?										
Book Report										
Reading										
Social Study/Science										
Workshops										
English Language Arts										
Math										
Science										
Social Studies										
Technology										
Physical Education										
Learning Plans										
L.T.I. Preparation										
L.T.I.										
Enrichment										

End of Summer Break


Winter Break

Spring Break

280

Appendix Q

Learning Goals



Learning Goals

Met School

Met School Learning Goals

FIVE LEARNING GOALS

Empirical Reasoning	1
Quantitative Reasoning	2
Communication	3
Social Reasoning	4
Personal Qualities	5

How do I prove it?
Empirical Reasoning

This goal is to think like a scientist: to use empirical evidence and a logical process to make decisions and to evaluate hypotheses.

What idea do I want to test?
What has other research shown?
What is my hypothesis?
How can I test it?
What data do I need to collect?
How will I collect the information?
What will I use as a control in my research?
How good is my information?
What are the results of my research?
What error do I have?
What conclusions can I draw from my research?
How will I present my results?

How do I measure, compare or represent it?
Quantitative Reasoning

This goal is to think like a mathematician: to understand numbers, to analyze uncertainty, the properties of shapes, and to study how things change over time.

How can I use numbers to evaluate my hypothesis?
What numerical information can I collect about this?
Can I estimate this quantity?
How can I represent this information as a formula/diagram?
How can I interpret this formula or graph?
How can I measure its shape or structure?
What trends do I see?

How do I take in and express ideas?
Communication

This goal is to be a great communicator: to understand your audience, to write, read, speak and listen well, and to use technology and artistic expression to communicate.

How can I write about it?
What is the main idea I want to get across (thesis)?
Who is my audience?
What can I read about it?
Who can I listen to about it?
How can I speak about it?
How can technology help me to express it?
How can I express it creatively?

What are other people's perspectives?
Social Reasoning

This goal is to think like an historian or anthropologist: to see diverse perspectives, to understand social issues, to explore ethics, and to look at issues historically.

How do diverse communities view this?
How does this issue affect communities?
Who cares about this? To whom is it important?
What is the history of this?
How has this issue changed over time?
What social systems are in place around this?
What are the ethical questions behind this?

What do I bring to this process?
Personal Qualities


This goal is to demonstrate respect, responsibility, organization, leadership, time management, and to reflect on your abilities and strive for improvement.

How can I demonstrate respect?
How can I empathize more with others?
How can I strengthen my health and well-being?
How can I communicate honestly about this?
How can I be responsible for this?
How can I persevere at this?
How can I better organize my work?
How can I better manage my time?
How can I enhance my community through this?

Students & Advisors use the Learning Goals to help **expand** their project work and **challenge** themselves with new ideas.

Appendix R

MOU: Signed Agreement



Co-Directors
Dennis Littky Ph.D.
Elliot Washor, Ed.D.

Board Chair
Ronald A. Wolk

Board Members
Lorne Adrain
Paul Choquette
Bill Daugherty
Marc Ecko
Helena Foulkes
Gwen Fountain
Howard Fuller
Stanley Goldstein
Francie Heller
Saul Kaplan
Michael McMahon
Anne Miller
Daniel Pink
Richard A. Rosenbaum
Peter Schoenfeld
Warren Simmons
Chuck Squeri
Frank Wilson

SCHOOLS, INNOVATION, INFLUENCE

SCANNED

RECEIVED

APR 16 2009

SEVEN OAKS SCHOOL DIV. No. 10

Prof. no

ORIGINAL FILE COPY

April 7, 2009

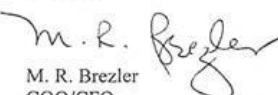
Brian O'Leary
Seven Oaks School Division
830 Powers Street
Winnipeg, Manitoba
Canada
R2V 4E7

Dear Brian,

Enclosed please find our proposal/contract for the development of one school for the 2009-2010 school year, along with the beginning invoice for this development. Please sign both copies of the enclosed contracts and return one copy to my attention at: Big Picture Learning
190 Ridgefield Drive
York, PA 17403

If you have any questions regarding any of the enclosed documents, please feel free to call me at 401.447.0562 or email me at mrbrezler@bigpicture.org

Regards,


M. R. Brezler
COO/CFO
Big Picture Learning

Big Picture Learning
325 Public Street
Providence, RI 02903

Big Picture Learning
P.O. Box 210
210 Ridgefield Drive, CA 92142

Big Picture Netherlands
KPC Groep
www.kpcgroep.nl

Big Picture Company
Australia
www.bigpicture.org.au



PROPOSAL TO *Seven Oaks School Division*
TO PROVIDE TECHNICAL ASSISTANCE AND SUPPORT IN THE
DEVELOPMENT OF A BIG PICTURE INSPIRED SCHOOL

MARCH 25, 2009

Seven Oaks School Division intends to develop **one** school for the **2009-2010** school year based on the Big Picture (BP) school design. This proposal describes the specific services to be provided, the timetable for the specified work, and their estimated costs for the period **March 2009-June 30, 2010**.

BIG PICTURE SERVICES

BP proposes to assist <school name> with this work by providing specific technical assistance and support services as requested.

Feasibility Study. BP will assist Seven Oaks School Division leaders in examining the BP school design; developing adaptations that align the design with the Seven Oaks School Division strategy; and engaging faculty, administrators, parents, business representatives, and the community in understanding the design and its benefits to students and their families.

School, Program, and Curriculum Designs. BP will provide assistance in creating school, program, and curriculum designs, including adaptations of the BP school facilities and organizational structures (e.g., rooms and spaces, school calendar and schedules, and staffing), school budget development, program development (e.g., daily schedule, organization of advisories, integration of LTI – Learning through Internship), and curriculum development (e.g., standards alignment, instructional strategies, and assessment).

Parent, Business, and Community Engagement Programs. BP will assist Seven Oaks School Division in developing descriptive materials and presentations regarding the proposed new BP school. These materials and presentations will be customized to specific audiences. BP will assist Seven Oaks School Division with establishing an advisory board for the school and providing training and support to the board.

Staff Selection. BP will assist in developing position descriptions, recruitment activities, and selection criteria and processes.

Principal Training/Coaching. BP will develop and provide education, training, and support services for Seven Oaks School Division BP school principals.

Staff Training/Coaching. BP will develop and provide education, training, and support services for Seven Oaks School Division BP school advisors and staff.

Student Recruitment. BP will assist Seven Oaks School Division in developing and implementing a student recruitment process, including outreach strategies, preparing materials, designing recruitment activities, and providing training and support to recruitment staff.



ESTIMATED COSTS (MARCH 2009-JUNE 30, 2010)

Principal & Advisor Development	
- Visit in March 2009 from Elliot, Greg Young and two students. Four days of consulting – two people for two days, plus reimbursement for airfare for Elliot, Greg & students.	- \$6000.00
- Visit in May 2009 from Greg Young to work with Adair and any identified teachers. One person for two days plus travel (in lieu of April Conference)	- \$3000.00
- Summer training 2009 with Greg Young. Three days on-site 1 day off site – four days of consulting plus travel. Training to cover BP basics, learning goals, school culture, academic requirements for year and other topics as needed by school.	- \$4000.00
- September training 2009 with Greg Young. Three days on-site, 1 day off-site – four days of consulting plus travel. Focus on advisor organizational strategies, interest exploration, curriculum/thematic unit outline, individual learning plans and other topics as needed by school.	- \$4000.00
- November training 2009 with Greg Young. Three days on-site, 1 day off-site – four days of consulting plus travel. Focus on grade-level expectations, exhibition prep, project development, internship process and other topics as needed by school.	- \$4000.00
- January visit to another Big Picture school for all school staff. 2 day visit includes 2 days of consulting, 1 day of coordination, travel cost for coach. School responsible for travel for school staff.	- \$4000.00
- March 2010 training with Greg Young. Three days on-site, 1 day off-site – four days of consulting plus travel. Focus on grade-level expectations, exhibitions, narratives, school culture and beginning summer planning.	- \$4000.00
- June 2010 training with Greg Young. Three days on-site, 1 day off-site – four days of consulting plus travel. Focus on level-up, year-end closure, planning for summer opportunities for students and staff, beginning planning for following school year.	- \$4000.00
Estimated costs:	\$33,000.00
Big Picture Materials	
60 supercalendars – 45 for students, 5 for staff plus 10 extra	\$900.00
Big Picture online accounts for staff \$150/account – 4 accounts	\$600.00
Sub-Total Estimated Costs	\$34,500.00
Admin/Overhead (8%)	\$2,760.00
Total Estimated Costs	\$37,260.00



PAYMENT OF CONTRACT The total possible payment for Big Picture Learning's work as described above, is \$37,260.00. The first payment must be made at the time of contract signing. Each additional payment will be invoiced at the end of each quarter according to the schedule below. Big Picture Learning will write a detailed report outlining services delivered during each quarter.

- **Payment #1:** Upon contract signing – Payment of \$ 9,315.00 (invoice attached)
- **Payment #2:** June 30, 2009 – Payment of \$ 9,315.00
- **Payment #3:** December 30, 2009 – Payment of \$ 9,315.00
- **Payment #4:** March 30, 2010 – Payment of \$ 9,315.00

CONTACT

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(401) 447-5062
mrbrezler@metmail.org

Elliot Washor
Co-founder
Big Picture Learning
325 Public Street
Providence, RI 02905
ewashor@gmail.com

By signing this agreement, we understand and agree to the above-named actions.



Brian O'Leary
Superintendent of Schools

April 20 / 09

Date



Elliot Washor
Co-Director, The Big Picture Company

3.27.09

Date

Appendix S

Winnipeg Free Press: Internships Set School Apart

Internships set school apart - Winnipeg Free Press

Page 1 of

Winnipeg Free Press

 PRINT THIS

Winnipeg Free Press - PRINT EDITION

Internships set school apart

Students spend 2 days a week in world working, helping

By: Nick Martin

Posted: 03/06/2010 1:00 AM | Comments: 0 (including replies)

It's a school where knocking a hole in the classroom wall is really cool. A school where students spend two days a week out in the world learning and contributing, maybe figuring out where their lives are going.

Manitoba's first Met School, inside Garden City Collegiate, is a school-within-a-school where part of the plan is to knock down a big chunk of wall and connect three classrooms directly.

Met isn't an acronym, it doesn't stand for anything, it's an innovative education movement that began in Rhode Island 15 years ago and has spread here, explained Adair Warren, principal of the Seven Oaks School Division Met School.

The Met School has 40 students in grades 9 and 10 in three classrooms, and will expand in September to include Grade 11 and go to five classrooms.

It has elements that sound somewhat like multigrade flex programs, like off-campus classrooms, like work placements. But Met is its own package.

"One of the main differences is the internships," said Warren. "The internships are what really set us apart."

First, students develop a resume and interview techniques, then undergo a 40-minute interview before starting an internship.

Students intern Tuesdays and Thursdays with a business, community agency, or institution, not only working, but also planning and carrying out a major project that will benefit the host organization.

The idea is to open up the world to students, show them how the curriculum connects directly to the real world, and help kids discover their options, said Warren.

Some of the students plan to go to university, some envision professional careers, some will work after Grade 12. Every student and his or her parents have to write letters describing their passions and interests, and why they believe a place in the school would be good for them, said Warren.

Grade 10 student [redacted] said it's a big change from a regular classroom, but a welcome change.

"For science, I've done more hands-on work than I did my whole Grade 9 year," he said.

He's gone to Ecole Seven Oaks Middle School twice a week since October, working with Grade 6 students in the morning, then working afternoons on the school's major stage production of The Wizard.

"I help build sets for the play" as his internship project, said [redacted], who wants to become a teacher.

Grade 9 student [redacted] is considering teaching or some form of working with kids. She interns at the Manitoba Children's Museum, where her project is developing the curriculum aspects of the April school field trips program -- a kid-friendly bugs exhibit called Attack of the Blood Suckers.

[redacted] said the group work at the Met School appealed to her.

"I really liked the idea of the different type of learning," [redacted] said.

The Met School has three staff, all certified classroom teachers -- who are all called advisers instead of teachers. "They don't teach the students everything, they facilitate," said Warren.

Adviser [redacted] is just fine with that title: "I spend a lot of my day one-on-one with the students -- a lot of their work is independent," [redacted] said. "I'll help them with their brainstorming."

Warren is making the rounds of the division's Grade 8 classes to describe the Met School, which she said is open to anyone in Seven Oaks S.D.

nick.martin@freepress.mb.ca

Find this article at:

<http://www.winnipegfreepress.com/arts-and-life/life/internships-set-school-apart-86706072.html>

☐ Check the box to include the list of links referenced in the article.

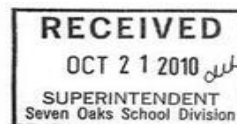
<http://www.printthis.clickability.com/pt/cpt?expire=&title=Internships+set+school+apart...> 10/10/201

Appendix T

Proposal to Seven Oaks School Division to Provide Technical Assistance and Support in the Development of a Big Picture Inspired School, September 8, 2010



**PROPOSAL TO *Seven Oaks School Division*
TO PROVIDE TECHNICAL ASSISTANCE AND SUPPORT IN THE
DEVELOPMENT OF A BIG PICTURE INSPIRED SCHOOL**



SEPTEMBER 8, 2010

Seven Oaks School Division intends to sustain **one** school for the **2010-2011** school year based on the Big Picture (BP) school design. This proposal describes the specific services to be provided, the timetable for the specified work, and their estimated costs for the period **July 1, 2010-June 30, 2011**

BIG PICTURE SERVICES

BP proposes to assist Seven Oaks School Division with this work by providing specific technical assistance and support services as requested.

Feasibility Study. BP will assist Seven Oaks School Division leaders in examining the BP school design; developing adaptations that align the design with the Seven Oaks School Division strategy; and engaging faculty, administrators, parents, business representatives, and the community in understanding the design and its benefits to students and their families.

School, Program, and Curriculum Designs. BP will provide assistance in creating school, program, and curriculum designs, including adaptations of the BP school facilities and organizational structures (e.g., rooms and spaces, school calendar and schedules, and staffing), school budget development, program development (e.g., daily schedule, organization of advisories, integration of LTI – Learning through Internship), and curriculum development (e.g., standards alignment, instructional strategies, and assessment).

Parent, Business, and Community Engagement Programs. BP will assist Seven Oaks School Division in developing descriptive materials and presentations regarding the proposed new BP school. These materials and presentations will be customized to specific audiences. BP will assist Seven Oaks School Division with establishing an advisory board for the school and providing training and support to the board.

Staff Selection. BP will assist in developing position descriptions, recruitment activities, and selection criteria and processes.

Principal Training/Coaching. BP will develop and provide education, training, and support services for Seven Oaks School Division BP school principals.

Staff Training/Coaching. BP will develop and provide education, training, and support services for Seven Oaks School Division BP school advisors and staff.

Student Recruitment. BP will assist Seven Oaks School Division in developing and implementing a student recruitment process, including outreach strategies, preparing materials, designing recruitment activities, and providing training and support to recruitment staff.

**ESTIMATED COSTS (JULY 1, 2010 – JUNE 30, 2011)**

Principal & Advisor Development	
One coaching visit by Greg Young in February 2011	\$4,000.00
Site visit to a Met School (3 people) May 2011 includes hotel, meals, local transportation and site visit. Transportation to and from site (airfare) covered by district.	\$3,000.00
Big Bang, August 2011 includes registration and hotel for three attendees	\$4,000.00
Estimated costs:	\$11,000.00
Big Picture Materials	
50 supercalendars	\$600.00
Big Picture online accounts for staff \$150/account – 4 accounts	\$600.00
Total Estimated Costs	\$12,200.00

PAYMENT OF CONTRACT The total possible payment for Big Picture Learning's work as described above, is \$12,200.00. The payments will be invoiced according to the schedule below.

- **Payment #2:** October 1, 2010 – Payment of \$4,067.00
- **Payment #3:** December 30, 2010 – Payment of \$ 4,066.00
- **Payment #4:** March 30, 2011 – Payment of \$ 4,066.00

CONTACT

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Providence, RI 02905
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mrbrezler@metmail.org

Brian O'Leary
Superintendent of Schools
Seven Oaks School Division
830 Powers Street
Winnipeg, Manitoba R2V 4E7
(204) 586-8061
Brian.OLeary@7oaks.org

By signing this agreement, we understand and agree to the above.


Brian O'Leary
Superintendent of Schools

Oct 5, 2010
Date

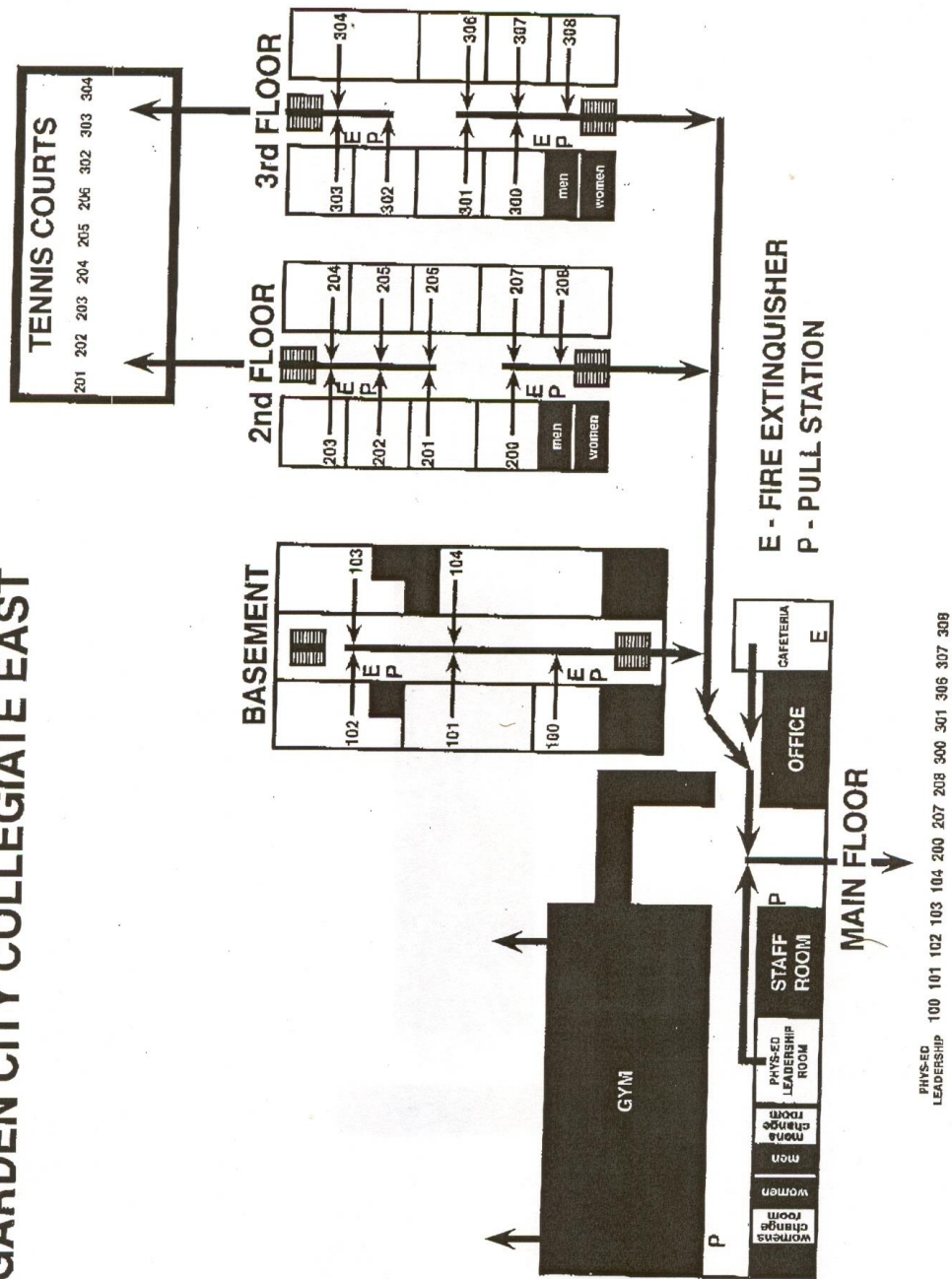

Elliot Washor
Co-Director, The Big Picture Company

Oct 13, 2010
Date

Appendix U

Schematic of Garden City Collegiate

GARDEN CITY COLLEGIATE EAST



Appendix V

Met School Brochure



- ◆ Learning based on interests and goals.
- ◆ A curriculum that is relevant to the student and is connected to the real world.
- ◆ Abilities are authentically measured and assessed through quality work.

“One Student At a Time...”



Canadian Education Association's
Ken Spencer Award
for Innovation in Teaching and Learning...

honours schools that demonstrate a
commitment to engaging the **hearts**
and **minds** of adolescent learners through
a **successful** and **sustainable**
initiative to **deeply engage** students
in their **LEARNING**.

February 11, 2011



A new way to **THINK** about learning:

- ◆ Empirical Reasoning
How do I prove it?
- ◆ Quantitative Reasoning
How do I measure, compare or represent it?
- ◆ Social Reasoning
What are other people's perspectives on this?
- ◆ Communication
How do I take in and express ideas?
- ◆ Personal Qualities
What do I bring to this process?

For more information contact:
Adair Warren
Met School Principal
336-5050
adair.warren@7oaks.org



Now accepting applications
for September 2011

**Seven Oaks School Division
Met School**

is the proud recipient of the



Ken Spencer Award 2010
for Innovation in Teaching & Learning



**SEVEN OAKS
SCHOOL DIVISION**
community begins here

Big Picture Learning

Student Engagement Is...

Relationships

A respectful, positive and challenging learning environment.

Relevance

Meaningful learning linked to passions and interests.

Rigor

Essential skills and academic challenges that lead to success.

Met School Students

ARE... **Curious**
Motivated
Enthusiastic
Independent
Organized
Creative

In the

Met School

You...

Pursue Passions

Let your passions and interests guide your learning.

Learn Through Internship (LTI)

Spend two days a week at an internship site—learning in the real world.

Personalize Your Learning

Meet Manitoba Curriculum requirements with a Learning Plan created with your parents, mentor and advisor.

Join an Advisory

Be a part of an Advisory, be a part of a strong learning community.

Welcome Family

Include your family in your educational and Met School experiences.

Are Organized & Self-Motivated

Be organized, motivated and committed with a strong desire to learn.

RESPECT Yourself and Others

A respectful learning community that challenges you to be responsible for yourself and others.

Frequently Asked Questions:

1. Who can apply?

Seven Oaks School Division students entering grades 9 to 12 are invited to apply. (Born between Jan. 1, 1994 & Dec. 31, 1997). Spaces are limited.

2. How do I apply?

Application is by letter from both student and parent supported with a recent school report card and completed application form. Application forms are available online: <http://www.7oaks.org/school/themet>

Application deadline is: **Tuesday, March 15, 2011**

The philosophy of Big Picture Schools is that the student population reflect the general high school population. As such, students will be randomly selected from the applications. Students and their parents will receive an acceptance letter in late April. At that time, students and families not selected for registration will be informed by letter and/or phone call.

3. How can I find out more?

Students and families are invited to attend the

Met School Open House
Wednesday, March 9, 7:45pm

Garden City Collegiate

For more information contact:

Adair Warren
Met School Principal
336-5050
adair.warren@7oaks.org



SEVEN OAKS SCHOOL DIVISION
 830 Powers Street
 Winnipeg, Manitoba R2V 4E7
 Telephone: (204) 586-8061 - Fax: (204) 589-2504
 e-mail: communitybeginshere@7oaks.org

TO: Administrators, Teachers, Clinicians

DATE: March 11, 2009

PERSONNEL BULLETIN #2

Applications are invited for the following teaching positions effective September 8th, 2009:

School

Grades

Seven Oaks School Division Met School Teacher Advisors - Grades 9 & 10

The Seven Oaks School Division Met School, a Big Picture Inspired School, will open in September, 2009 as a school within a school at Garden City Collegiate. The Met School experience creates a safe, trusting, and collaborative learning environment where students and families are active participants in the design and assessment of each child's learning. Each student's Learning Plan starts with his or her unique needs, interest and passions, and meets curricular goals through school and community experiences. The Met School is accepting 45 students for the 2009-2010 year.

Met School Advisors:

- lead the design of creative and challenging Learning Plans that support student goals and curricular outcomes
- work with students, families and mentors to facilitate student placements in Internships that support student learning
- develop comprehensive assessment plans and strategies that authentically measure the quality of a student's work
- teachers with questions about these openings are encouraged to contact Adair Warren at Garden City Collegiate

Staff interested in the above positions should apply in writing by Friday, March 20th, 2009 to:

Assistant Superintendent-Personnel

e-mail: communitybeginshere@7oaks.org

p.c. Superintendents' Team
 Principals
 Orah Moss

NOTE: Personnel Bulletins are e-mailed to each member of SOTA at his/her 7oaks.org e-mail address. They are also posted on the Division web site.

Appendix X

Excerpts from Student Handbook

NOVEMBER 2010

5 AS OF DESIGNING GREAT PROJECTS

These questions will help you think about what projects would be best suited to your LTI experience.

AUTHENTICITY

- Does the project emanate from a problem or question that has meaning to the student?
- Is it a problem or question that might actually be tackled by an adult at work or in the community?
- Will the student create or produce something that has personal or social value, beyond the school setting?

ACADEMIC RIGOR

- Does the project lead the student to acquire and apply knowledge central to one or more Learning Goal areas?
- Does it challenge the student to use methods of inquiry central to one or more disciplines (e.g., to think like a scientist)?
- Will the student develop higher order thinking skills (searching for evidence, taking different perspectives, etc.)?

ACTIVE LEARNING

- Will the student spend significant amounts of time doing field-based work?
- Does the project require the student to engage in real investigation, using a variety of methods, media, and sources?
- Is the student expected to communicate what they are learning through presentations?
- Does the work require the student to develop organizational and self-management skills?

ADULT RELATIONSHIPS

- Does the student have opportunities to meet and observe adults with relevant expertise and experience?
- Does the work of adults become more visible to the student?
- Do adults from outside the classroom help the student develop a sense of the real-world standards for this type of work?

ASSESSMENT

- Does the student have opportunities to review models of similar work products?
- Are there clear milestones or products at the completion of each distinct phase of the work, culminating in an exhibition, portfolio, or presentation?
- Will the student receive timely feedback on their works in progress and engage in periodic, structured self-assessment using clear project criteria that they have helped to set?

Excerpted from Adria Steinberg, *Real Learning, Real Work: School to Work as High School Reform* (New York: Routledge, 1997).

POST-HIGH SCHOOL TIP

Standardized tests like the PSAT, SAT, and ACT are a necessary evil if you are planning to go to college. The more familiar you are with the tests, and the more practice you have—the better you'll do. There are a whole bunch of websites and books that are available that can help with test prep and offer practice tests—for free. Check out www.number2.com or www.majortests.com or visit your local library to see what they have on the shelves!

WICKED COOL WEBSITE

Curiosity:
www.curiosity.ca
An interactive site where you can discover and explore how science, engineering, and technology affects your daily life.

TRAVEL OPPORTUNITY

High school abroad programs bring students, families, schools, and communities together in an interactive, cross-cultural learning experience. You'll live with a host family as their own son or daughter, attend high school, participate in family traditions, get involved through your personal interests, and experience life in a totally new and different environment. High school abroad programs are available for a semester, for the full academic year, or for summer study. Check out more at www.ciee.org.

SOME GREAT BOOKS

Feed by M.T. Anderson

In Defense of Food by Michael Pollan

Roots by Alex Haley

Follow the Rabbit-Proof Fence by Doris Pilkington Garimara

The Tempest's Tale by Walter Mosley

Chasing Lincoln's Killer by James Swanson

JOURNAL PROMPT

Across the country, public places such as libraries and museums are now smoke-free environments, and restaurants are required to have separate smoking and non-smoking sections. Some smoke-free advocates are now campaigning to ban smoking in all restaurants and bars. Do you think this is a good idea? Why or why not? Use specific reasons and examples to support your position.

Appendix Y

Report to the Community

<p>Met School 707 Jefferson Avenue Winnipeg, MB R2V 0P7 204-336-5050</p> <p>Principal: Adair Warren adair.warren@7oaks.org</p>	<p>RIGOUR RELEVANCE RELATIONSHIP</p> <p>Report to Community</p>	<p>The Seven Oaks School Division Met School</p> <p><u>Mission Statement</u></p> <p>The Seven Oaks School Division Met School provides a respectful, positive and challenging learning environment where meaningful learning is linked to student passions and interests. Each student's experience is centered on goals that are relevant to the student and are connected to the real world. Our "One Student at a Time" approach creates purposeful relationships with teachers, families and the community where essential skills and academic challenges lead to success.</p> <p><u>A little about our Met School</u></p> <p>The Seven Oaks School Division Met School is a school-within-a-school at Garden City Collegiate. We opened in September 2009 with three classrooms; 41 students in all with their three teacher advisors.</p> <p>Already, our Met School has provided many amazing opportunities to our students. They have experienced the challenges of high school academic rigour and the need to apply that learning to their internships in the community. Overwhelmingly, the experiences of our students and families have been very positive and together we are looking forward to our second year.</p> <p><u>Year One</u></p> <p>The Met School opened in September 2009 with goals to engage students in their learning through creative and challenging academic work and through internships that provided real world learning opportunities and the responsibility to contribute to the internship site with projects related to the curriculum. Students have also had an opportunity to explore their interests and make connections with learning opportunities in our community and globally. The year has been very successful; students have embraced new ways to think about their learning and taken responsibility to make their learning meaningful to themselves and others. Students have had very successful internship placements that have contributed to their personal growth and to their understandings of the link between learning and competence in the community. As we move into our second year, we have defined goals, measurable outcomes and strategies that will further enhance our teaching practices and the opportunities that Met School provides for our students and families.</p>
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The Seven Oaks School Division **Met School**

Our Goals for 2010–2011

Our goals are founded in responding to the challenges of opening a new school and establishing our place in our division, community and province. We recognize that student internship placements create valuable real world learning opportunities for students and strengthen relationships with caring adults and our community. We also have reflected on curricular outcomes and assessment practices in terms of student engagement and student commitment to quality work.

As we move into our second year, we have three goals:

1. To strengthen classroom practices that support students' commitment to quality work and valuable learning experiences. To help students value the learning experiences that Met School offers and take responsibility for their learning through: meeting deadlines, submitting quality work and critically reflecting on their strengths and challenges.
2. To secure Internships that challenge students to develop their personal qualities, their understandings of community and that bring together their academic learning with real world applications.
3. To strengthen our Met School program and better inform our students, families, and community about the opportunities Met School holds for high school students, our families and our community.

Strategies to achieve our goals

To meet our goals we will strengthen classroom practices and standards for:

- ♦ Flow of the Year planning
- ♦ Learning Plans & Interest Exploration
- ♦ The "Who Am I?" Project
- ♦ A portfolio rubric with student input
- ♦ Students' ability to meaningfully reflect on their learning (metacognition)
- ♦ Securing timely Internship placements
- ♦ Developing meaningful internship projects that are linked to curricular outcomes
- ♦ Continuing to develop assessment approaches that bring together internship projects with curricular outcomes
- ♦ Developing students as ambassadors for the Met School
- ♦ Outreach to parents: Website development and home visits

Met School and Student Engagement

Our goal is for our students to better develop their confidence and competence and to be engaged in their learning.

- ♦ Students will demonstrate their academic learning in multiple ways (portfolios, exhibitions & reflections on learning).
- ♦ Students will demonstrate academic growth with the assessment of and tracking of competence in curricular outcomes and skills.
- ♦ Student learning will be evident in portfolios and exhibitions.
- ♦ Students and families will be better able to connect Met School learning to curricular outcomes, credits and assessment.
- ♦ Students will demonstrate passion and commitment in their academic responsibilities.

Our website... <http://www.7oaks.org/school/themet/Pages/default.aspx>

Appendix Z

Learning Plan

<p>Who Am I? The "Who Am I?" project is a Met school 101 requirement. This short-term project is designed to help students identify their interests and learn more about themselves.</p>
<p>Book Report Reading plays a significant role in the Met school. Every year students will be required to read a specified amount of books of their choice and report on them.</p>
<p>Journaing A Met school requirement is that students must keep a journal and write in it three times per week.</p>
<p>Community Service It is a Met school requirement that students have a positive impact on their community. Connecting to the Manitoba Social Studies curriculum, this can be their local and/or global community.</p>
<p>Workshops</p>
<p>English Language Arts The ELA workshops will be student driven. Students will be asked to give suggestions for workshops based on curricular areas that they are struggling with. Some workshop ideas include: essay writing, poetry, creative writing, grammar, punctuation, vocabulary, etc.</p>
<p>Math Specific areas of the Math curriculum, which have been identified as being potentially difficult to integrate into LTIs or SBPs, have been targeted for the Math workshops. Some workshop ideas include: exponents, polynomials, algebra, etc.</p>
<p>Science and Social Studies The main focus of the Social Studies and Science workshops will be social justice and sustainability, approached from an integrated, holistic manner whenever possible. They will encompass more than in-class work and also include a variety of guest speakers and field trips. Some workshop ideas include: Engineers Without Borders workshops, Winnipeg Harvest Legislature Tour, Oak Hammock Marsh, mock-elections, immigration simulation game, fair trade simulation game, planetarium visit, Assiniboine Park conservatory workshops, geocaching, etc.</p>
<p>Technology Throughout the year, a wide variety of technology workshops will be available to students. Some technology workshop ideas include: Microsoft Word, PowerPoint, Excel, web development etc.</p>
<p>Physical Education GCCI will be providing Met school students with a physical education teacher for the school year. Phys Ed classes will be a regular part of their daily school schedule.</p>

Who Am I?

The "Who Am I?" project is a Met school 101 requirement. This short-term project is designed to help students identify their interests and learn more about themselves.

Book Report

Reading plays a significant role in the Met school. Every year students will be required to read a specified amount of books of their choice and report on them.

Journaling

A Met school requirement is that students maintain a journal and write in it three times per week.

Community Service

It is a Met school requirement that students have a positive impact on their community. Connecting to the Manitoba Social Studies curriculum, this can be their local and/or global community.

Workshops**English Language Arts**

The ELA workshops will be student driven. Students will be asked to give suggestions for workshops based on curricular areas that they are struggling with. Some workshop ideas include: essay writing, poetry, creative writing, grammar, punctuation, vocabulary, etc.

Math

Specific areas of the Math curriculum, which have been identified as being potentially difficult to integrate into LTIs or SBPs, have been targeted for the Math workshops. Some workshop ideas include: exponents, polynomials, algebra, etc.

Science and Social Studies

The main focus of the Social Studies and Science workshops will be social justice and sustainability, approached from an integrated, holistic manner whenever possible. They will encompass more than in-class work and also include a variety of guest speakers and field trips. Some workshop ideas include: Engineers Without Borders workshops, Winnipeg Harvest, Legislature Tour, Oak Hammock Marsh, mock-elections, immigration simulation game, fair trade simulation game, planetarium visit, Assiniboine Park conservatory workshops, geocaching, etc.

Technology

Throughout the year, a wide variety of technology workshops will be available to students. Some technology workshop ideas include: Microsoft Word, PowerPoint, Excel, web development etc.

Physical Education

GCCI will be providing Met school students with a physical education teacher for the school year. Phys Ed classes will be a regular part of their daily school schedule.

Appendix AA

Learning Goal 1

Learning Goal 1: Empirical Reasoning

The goal is to use empirical processes and evidence and a logical process to make decisions and to evaluate hypotheses.

Questions a student might ask:

The focus

- What area am I interested in/curious about/passionate about? What essential question do I want to explore? What idea do I want to test?
- What do I already know about this? What has other research shown? Does this change the question? The focus?
- Do I have a hypothesis? How can I test it?

The research

- What information (data) do I need to collect and generate?
- How will I collect the information? What steps will I follow? What equipment will I need?
- Will I use a control in my research? Choose
- Are there any risks involved in my plan? What are the ethical considerations to my process? How am I (are we) dealing with these?

Doing the work

- How am I going? What am I observing? What am I learning? Do I need to make changes to my approach? This is rarely a linear process. It is more likely to be start/stop/start and cyclic in nature.

The evidence

- How good is my information?
- What are the results of my research?
- What error do I have? How could I have improved my approach?
- What conclusions can I draw from my research evidence?
- Am I making inappropriate links between cause/effect?
- Where should I take this work next?

Presenting to others

- How will I present my results?
- How will I describe what I have learned in doing this work?

Appendix BB

SOSD Policy GBI

THE SEVEN OAKS SCHOOL DIVISION

GBI

PROFESSIONAL LEARNING FRAMEWORK

Seven Oaks School Division desires high quality education for its students. Quality instruction is concomitant with quality education. Effective teaching forms the foundation on which quality education is based.

Teachers, acting as professionals who serve the public interest, must be personally responsible and accountable for their professional judgements and actions. They must ensure that they are current in the knowledge of the profession and must take responsibility for the application of that knowledge in diverse situations.

The Professional Learning Framework requires that teachers engage in examination of their practice by:

- Documenting and showing evidence of teaching practice through the use of a professional portfolio, personal journal, interactive journal or other means
- Reflecting upon one's practice to link the theoretical frameworks and broader purposes of education to one's actions in the classroom
- Dialoguing with peers and administrators to consider educational judgements made and how they link one's knowledge and practice
- Giving consideration to other relevant perspectives
- Finding ways for research to inform practice as well as for practice to inform research
- Acting upon new understandings
- Preparation of an Annual Reflection on Professional Learning to be discussed with administrators and submitted to the Superintendents' Department for placement in the personnel record

In the Professional Learning Framework reflection, dialogue and action are built upon enabling conditions of trust and open communication. Leadership built on trust and communication will foster the professional learning which results through reflection, dialogue and action. Administrators and teachers benefit from collegial discussion of education and teaching and are encouraged to engage in such discussion frequently. Educational judgement is negotiated through reflective dialogue.

DOCUMENTATION

The documentation package is the record of the individual teacher wherein the teacher defines his/her situation, interprets what is seen to be important and documents the practices that were applied. The highly unique nature of the documentation package precludes any definitive description.

The teacher's documentation is a tool for the professional development of the teacher in

March 14, 2005