A Perfect Storm for Leading Equity and Inclusion: Policy Complexities, Varied Learning Needs, and Cultures that Don't Support Them

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Abstract

The case describes an experienced principal's arrival at a new school, his observations of the school and its teachers, and his experiences as he attempts to ensure all students have access to education, particularly those requiring accommodations or assistive technology. The culture of the school is compartmentalized; early- and mid- to late-career teachers do not engage with one another. Some teachers use the technology available to the classrooms and some do not, regardless of student need. Communication and competency issues also arise, and the parent community is concerned. The principal must balance all constituents' needs and interests while meeting a vision for an equitable and inclusive school. The case includes three activities and accompanying readings that explore different issues that arise. The first activity unpacks these concepts using a structure-culture-agency framework. The second activity takes a closer look at structure and agency through policy development. Lastly, the third activity examines the impact of culture and agency through professional development planning.

Keywords: school leadership, principal's role, equity, inclusion, school culture

Governments and school boards are acknowledging the need to promote all students' access to learning opportunities, especially in increasingly diverse school environments. Provincial- and state-level policies to promote equity and inclusion are on the rise; however, due to the diversity in the educational environments they target, the policies fall short of providing the direction needed (Coburn, Hill, & Spillane, 2016) to make equity and inclusion a reality. Ontario's Equity and Inclusive Education Strategy (2009), for instance, outlined a four-year implementation plan that saw funding provided to boards during the first year "to support and promote equity and inclusive education and school safety, and to address harassment in schools" (Ontario Ministry of Education [OME], 2009, p. 19). "Support [for] professional learning on equity and inclusive education for staff working in schools, boards, and the ministry" (OME, p. 21) was coupled with limited direction to boards regarding policy and programming in the second year, with the expectation that boards and schools would roll out their plans in the third and fourth years. This situation is not surprising in a diverse society; policy-makers walk a tightrope between specificity and vagueness, with policy that provides guidance but does not apply to all constituents on one side, and policy that applies broadly but does not provide guidance on the other side. Regardless, the very real consequences of this balancing act are policies interpreted and implemented in unintended ways, at best, or not implemented at all (Ball, Maguire, Braun, & Hoskins, 2011; Clune, 1990). The current Ministry guidelines (OME, 2014) offer no additional support; they are written with the assumption that schools and school boards have policies and procedures in place already. Almost a decade after Ontario's legislation, and with regard to similar policies in other jurisdictions, are equity and inclusion a reality within diverse school environ-

ments? And, if so, how far have schools moved toward equity and inclusion within diversity? The case that follows focuses on students' accessibility to education and assistive technology to achieve that purpose. While inclusivity entails more than the application of assistive technology, the case and the activities associated with it allow for an examination of the types of issues that arise with policy development and implementation, and the kinds of changes needed at the organizational level so that inclusive practices become a reality.

Case Narrative

Eric noted the well-equipped and maintained playground and the attractive landscaping around the freshly painted front doors as he strode up the tidy walkway to Sunnyview Elementary School's doors on a hot, August morning. He took a deep breath and a last look around at the tree-lined, well-to-do neighbourhood served by the school, pulled open one of the large front doors and walked through. Eric had worked in inner city schools, for the most part, during his 15 years as principal. His last school was a sprawling, over-subscribed urban elementary school with a strong teaching staff, but a transient student body and limited resources. Well, that was about to change. Eric was looking forward to a less stressful post, and was definitely not going to miss the frenetic pace, the overcrowded classrooms and portables, and negotiating with the board and community organizations for much-needed resources to keep programmes running—a major contributor to workload increase. His staff and students had thrived; the students were meeting curriculum expectations, and the teachers were motivated, knowledgeable, and skilled, having taken advantage of the learning opportunities Eric and other educators made available. There was no reason to expect any different at his new school once he took the helm. After all, Sunnyview was already performing consistently well on the province's Education Quality and Accountability Office (EQAO) standardized tests.

Superintendent Ken Shah met with Eric that morning, and it was clear he had different ideas.

"I won't mince words with you, Eric. The school's stagnating, as far as I'm concerned. The EQAO literacy, and especially the math scores, have stayed the same for more than three years. Sure, the scores are good overall, but the school does well in spite of the teaching," stated Ken. This focus on test scores was a bit of a surprise to Eric. With his commitment to inclusion and equity, he wasn't sure how his focus would mesh with Ken's.

"Alright, what is it you'd like to see happen here?" inquired Eric.

"Now, I've seen what you can do with a high-needs school. Very impressive. At this point, I need you here to turn the place around. Launch the school into a growth phase," Ken stated.

"That's a pretty tall order, but I'm confident I can do it. What's the time frame?" inquired Eric.

"Look, I'm not under any illusion. You just got here, you've got to establish yourself with the staff. I'm not expecting miracles during your first year. That said, I'll be looking for some well-developed strategies for a go-forward plan, starting in year two," said Ken.

By late autumn, Eric was not so sure his new school was easier to lead than his previous one. Determined not to be the "new broom that sweeps clean," Eric took his time to observe the school's strengths, as well as its areas for growth, meeting with the teachers and support staff one-on-one as well as in groups, observing in the classrooms, and spending time with the children on the playground. He had a keen interest in ensuring that all students had access to learning opportunities in conformity with the provincial Equity and Inclusive Education Strategy. He was particularly attuned to the students with learning differences, physical disabilities, and developmental delays. The students would benefit from the use of assistive technology in some cases, as he knew from the Individualized Education Plans (IEPs). Dual language books and applications such as Google Translate were effectively used in the classroom for students who were English language learners at his previous school. The teachers at that school had also set up iPads with Read&Write Gold on them to provide comprehension support for children who were reading below grade level or who had a learning difference, and to give them a strategy for organizing their writing. The teachers had found that Knowledgehook and Prodigy were useful applications for math skills acquisition, providing assessments and guidance to teachers so they could best identify students' challenges, and math games to strengthen students' skills. Thankfully, his current school had the necessary technology, such as iPads, and access to the needed applications. Eric was looking for evidence that the teachers were able to differentiate instruction to meet all learners' needs, since students with special needs were no longer being placed in separate classes. Moreover, the school board employed an inclusive model with fewer special education and English as a Second Language (ESL) teachers to support the classroom teachers.

Eric started walk-throughs in the classrooms and meeting with teachers informally in their rooms, when convenient for them, as a way of getting to know each teacher at the beginning of the year. By and large, the educators were confident in their teaching skills—particularly those who had taught at Sunnyview for over 20 years, and there were several of them. All seemed to welcome his visits. Eric did not know for how long, though. A small group of early career teachers was a potential ray of sunshine. These teachers were well versed in technology, and were able to apply various equipment and applications in the classroom. Eric observed that the students seemed engaged. The children were able to participate in the same tasks but in different ways, in accordance with their developing abilities. He was careful not to single out these teachers' practices at this point, though. He had shared his supportive observations of one class's use of technology in a staff meeting, and was met with some staff members' crossed arms and tight-lipped expressions. That said, the classrooms were supposedly equipped with technology, particularly assistive technology, and he had noticed during his class visits this technology was not visible in a number of classes. Also, some teachers seemed to rely on paper and pencil tasks. Maybe he was just catching the teachers at a time when they did not need the technology, Eric thought. He would have to investigate further. A few weeks later, Eric found various equipment, both hardware and software licenses, in the resource centre's supply closet, collecting dust. The school was certainly not reflecting its motto: "Where all learners reach their potential." It was likely that some students' learning was limited without the technology; however, he and the teachers were faced with complex and diverse challenges, requiring resources and oppertunity to acquire knowledge and skills when the board had increasingly limited money and teachers had little time available during the day to develop their knowledge and skills.

Eric did not spend much time in the staff room. To be honest, he just did not have the time, and his appearance often put an end to the conversations in the room—an uncomfortable position to be in. As he entered the lounge to prepare his lunch, though, he often caught snatches of conversation:

"… I've been teaching for 35 years, and I'm thinking about retiring next year. I really don't want to spend my time 'developing my skill set' at this point…."

"Bottom line: I've been around long enough to have seen many policies come down the pipe only to disappear a couple of years later. What's different about the Equity and Inclusive Education Strategy?..."

"… I mean, if our standardized test scores were in the basement, I could see the need for professional development [PD] and new strategies, but my students are doing really well…."

"I like the idea of life-long learning, though. The Teachers Federation offers technology webinars as well as a 6-week learning community to develop tech skills."

"I'd like to get involved in that. As far as PD goes, it's really reasonably priced and convenient…."

So there is at least some interest among a few of the staff to learn to use technology, Eric concluded with some enthusiasm. But when he looked back through the teachers' annual plans for professional development, some of them had been saying that they would like to learn how to use the same technology for five years. "What's going on here?" Eric wondered.

Since then, he noticed that the mid-to-late- and the early-career teachers did not interact to any extent. The early-career teachers were more often found socializing around the staff room dining table, while the veterans ate their lunches and had their coffees in the lounge area. Although there did not seem to be animosity among the teachers, the two groups did not seek out members of the other group for professional consultation, or to work on committees together. Was this situation a long-standing pattern?

By June, Eric realized that he had his work cut out for him in the following year. He had worked to develop what he thought was a good rapport with staff members through regular check-ins to make sure they had what they needed and that they knew their concerns were heard. Regardless, he sensed an underlying resistance to make changes in practice. He had held several staff meetings on equity and inclusion throughout the year, he and the staff had collaboratively looked at student achievement data and individualized education plans, and he thought he had agreement from the staff that assistive technology was a strategy to increase some of their students' access to education. He had been directing the teachers' attention toward any technology professional development that came across his desk, and made it clear he would accommodate teachers who wanted to take advantage of it. He had thought this offer was generous, considering he really did not have the budget to support each teacher's professional development, nor the money to pay supply teachers so they could have time away from the classroom. He would have to find money from another expense line to make sure all teachers had access to training if they wanted it. But, so far, there had not been many takers.

Eric's thoughts were interrupted by a soft knock, and the administrative assistant peaked around his office door.

"Eric, Ms. Walker is here to speak with you about Sam. She doesn't have an appointment, but she's extremely upset with Sam's teacher. Can you fit her in?"

"Absolutely, send her right in."

Eric had established a positive relationship with Mrs. Walker over the year, and he considered her to be an engaged and involved parent in her child's education. Her son, Sam, was on an IEP, and Eric had met with Ms. Walker regularly over the year to make sure Eric's learning needs were addressed. Several parents had complained throughout the year about this particular teacher and his ability to engage their children, so the visit was not a surprise. What Ms. Walker had to say was a bit of a surprise, though.

"I called Mr. Evans for a meeting about Sam's progress yesterday. I can't tell you how upset I was about what he had to say. He told me Sam wasn't making any progress in class—that he'd 'flat-lined'! I'm shocked that a teacher would ever say something like that about a child, for starters. Apparently, Mr. Evans teaches the lessons, but Sam isn't paying attention and the teacher—if you can call him that—can't do anything to encourage him. So, that means my child is just sitting in class doing nothing! And I'm doing the best I can with Sam, you know that. Yes, Sam's got ADD and dyslexia, but I come to the parent-teacher interviews, I come to the meetings about Sam's IEP. I'm doing everything I can for my boy. I was so upset to hear Mr. Evans talk that way about my child. And why am I finding out about it in June?! I want that teacher removed from the class, or I want my child moved to another class. I don't want him with that teacher for another day."

Eric let Ms. Walker voice her concerns, then scheduled a follow-up meeting with her, to take place after he investigated the situation with Dan Evans and the educational assistant (EA) that worked with Sam part-time. Based on his previous meetings with Dan over the course of the year, Eric did not expect this conference to go well. After outlining his meeting with Ms. Walker, Eric gave Dan the opportunity to explain his perspective.

"Look, I don't know what you want from me. I'm doing my job! I teach the lessons, but I can't be responsible if the kids aren't even trying to learn the material! And where's the support I need in the class?! I've asked for a full-time EA for my class but I haven't gotten one. And we share a resource teacher across schools—it's ridiculous! How am I supposed to cope with so many students on IEPs for various exceptional needs?" complained Dan.

"Okay, I can understand that you're frustrated. I'm not planning to make any snap judgments about the complaints—I'm simply making sure that I get your perspective, as well as that of any others who are involved, so I have a more complete picture of what's going on. As you know, though, I do have an expectation that teachers will differentiate their instruction and learning tasks to meet the needs of the students. As I've mentioned in previous meetings with you, you have access to assistive technology to support students while they're working with you, instead of waiting for the EA or SERT [special education resource teacher] to provide support," Eric responded.

The meeting ended with the teacher's discontent hanging heavily in the air. Eric needed to make sure the teachers were meeting the students' needs; however, he could see Dan's point, and knew other teachers felt the same level of frustration. Educators' ability to adapt their teaching to the students' diverse needs was greatly compromised by limited money and time, as well as human and material resources from the board, and he could see signs that some of Sunnyview's teachers were overwhelmed. He would likely have to do some in-servicing of his own for the teachers, and find appropriate social services to come in and work with staff and students. He might also have to spend some time with Sam, working one-on-one with him. After all, it was too late in the year to put him in another teacher's class.

The parent chair of the school council had gotten wind of the concerns by the end of the week. The council was made up of well-off and influential parents who were "maze bright" when it came to the education system, and who contributed financially to fundraising projects, such as the purchase of technology for the school. With a mandate to advise and to make recommendations to principals and the boards on any matter, the chair called to request a council discussion at the end of the month about the lack of human and material resources in the classrooms, as well as what could be done about teachers who did not want to do their jobs. As he returned to his office from playground supervision, Eric's ruminations on how best to structure learning opportunities for his staff next year were cut short with the school administrative assistant's note on his desk: a representative of the teachers' union called and would like to speak with him. There had

been no outright opposition from the teaching staff, but he could guess what the call was about. He could almost predict the accusation and question he would be asked: "There have been reports that you have challenged federation members' professional judgment. If you want changes in practice, are you giving members time, money, resources, and guidance so they can change their practices?" He used to think he was an instructional leader in the early days. He was more of a community liaison now, putting out fires of discontent among different stakeholder groups, building relationships and seeking out resources in the community, championing staff efforts to adapt to complex educational challenges, and all the while doing his best to support students in an age of accountability and shrinking funding. With a sigh of resignation, Eric picked up the phone, pausing to reflect on the increasing work demands and the changing roles of the principal.

Teaching Notes

This case is essentially a call for change, for teaching practices to be inclusive, and to engage students using the available technology intended to enable all students to meet their academic potential, in particular. There are a number of issues at play in the case, and they all impact opportunities for organizational change, as well as issues such as work-life balance. The instructor might ask the students (or workshop participants) some general questions about the issues they can identify in the case when beginning the discussion:

- What do you see as the main issues that arise for Eric at Sunnyview?
- Who are the constituents in the case, and which constituents are impacted by the issues?
- The case ends with Eric returning the union representative's phone call. What would be the likely conversation that follows, or the epilogue, for the case?

For the purpose of analyzing the case, the instructor may find it helpful to group the issues in several categories. Amanda Datnow, Lea Hubbard and Bud Mehan (2002) identified three features that needed to be considered for an organizational change to be successful through their longitudinal research findings on school reform. Those features are (1) structure, (2) culture and (3) agency, and they may be used to group or frame the issues. For example, some of the identified issues may include: limited or inconsistent inclusion of students with learning differences or disabilities (students' differential agency); the limited inclusion of teachers who are not technologically savvy or a lack of staff input in the school's vision (limited agency of some or all of the teaching staff); a culture that does not promote collaboration among staff, or across families, communities and school personnel (e.g., existing culture); a lack of policies and procedures (e.g., structures) at the district and school levels that promote inclusion; and the use of technology, for example.

Before presenting the activities, it would be helpful for the instructor to describe Datnow et al.'s (2002) theory and provide some examples of structure, culture, and agency. It might also be useful to create a diagram to identify the key issues, and the impact of structures as well as the elements of the school's culture and agency that influence the issues. A Venn diagram might be useful for this purpose. The following are some definitions of these features that are taken from literature. There are other definitions, and the instructor should feel free to use whatever definitions are appropriate for the session.

Structure

Reform initiatives and current social contexts are impacted by organizational structures, in this case, the structure of schooling and its position within a broader economic system (Anyon, 2005; Bowles & Gintis, 1976). Structure refers to the organizational arrangement among groups of people, such as school communities, families, and civic communities. Examples of structures may include the hierarchical nature of the education system, with respect to authority and responsibility. Policies at various levels—government, school district, and school—outlining protocols, guidelines for behavior, and procedures to follow are also structures. Within the school, there are structures, such as school councils that function in an advisory role to improve student achievement and increase accountability by making recommendations to principals on any school matter, working groups and committees, subject departments in secondary schools, and primary and junior divisions in elementary schools. The nature of structures defines and shapes social action, and the ways in which people interact with one another within organizations, as well as how schools, families, and communities have interacted with the district, province or territory, and the federal government (Hands & Hubbard, 2011).

Culture

The culture of an organization has been described as "a pattern of shared basic assumptions that the group learned as it solved its problems…to be taught to new members as the correct way to perceive, think, and feel in relation to those problems" (Schein, 1995 p. 279). Culture is often thought of as "the way we do things around here" (Schein, 1995, p. 276), but it is more than that. Features of organizational culture include patterns of behavior, group norms, espoused values, a formal philosophy, members' skills, members' mental models, and shared meanings (Schein, 1995). For example, some of the skills required of employees in an engineering firm differ from the skills required to work in a restaurant, and it may be that the way members communicate with each other in their organization differs as well. Likely, there is work-specific vocabulary, for instance. The type of industry and the work people do shape the conversations and language people use. As an example of values and beliefs, educators' views about the importance of community involvement in education are reflected in the number and type of school-community collaborative activities schools have; if teachers and principals think community involvement and democratic participation in public organizations are important, their schools typically have more community partners than those schools with educators who do not see the value (Hands, 2009). The beliefs, values, social and political relations, as well as expectations that guide behavior and practices, distinguish one school culture from another (Gilley, 2000; Steiner, 2002). Teachers' activities and goals reflect the school culture, and principals influence its maintenance and expression (Donaldson, 2006; Leonard, 1999) via their support—or lack thereof—for those goals and activities (Hands, 2010; Muncey & McQuillan, 1996).

Agency

Activities are driven by the individual actions, or agency of the people involved in them. Individuals' actions (or individuals' ability to act) are influenced by a variety of structural and cultural factors (Hands & Hubbard, 2011). Structures such as policies or laws define agency or action. These structures provide guidelines regarding what certain people can and cannot do at any given time or circumstance. For example, the law in Ontario requires that all drivers and passengers in vehicles wear seatbelts. In this situation, the law dictates expectations for people's behaviour in vehicles. People's actions are also shaped by cultural context; that is, their racial, ethnic, class, linguistic, and gendered positions influence their experiences, attitudes, and goals, which influence their behavior and the potential outcome(s) of their action (Hands & Hubbard, 2011). Inclusive curriculum materials, for example, impact whether people are able to act. English language learners may not be able to comprehend text and participate in class discussions if they do not have access to learning opportunities and knowledge through dual language texts. If this is the case, their agency is limited. Similarly, students who identify themselves as belonging to a cultural minority may have limited agency and disengage in academic situations where they do not see educators who represent their ethnic background, for example, and where they do not see themselves reflected in the curriculum materials (Dei et al., 2000). The education's lack of relevance to students limits their engagement with it.

The case study allows readers to take a close look at principals' challenges in implementing provincial- and board-level policies, such as the Equity and Inclusive Education Strategy (OME, 2009) using the structure-culture-agency model for educational change (Datnow, Hubbard, & Mehan, 2002). Ambiguous policy, combined with limited money, time, and material resources at leaders' disposal, creates a perfect storm. Principals are put in the position of taking on entrepreneurial leadership roles (Fernald, Solomon, & Tarabishy, 2005) in addition to their administrative and instructional leadership, establishing alliances in the community, and seeking out partnerships to fill the gaps in resources so they can develop inclusive programmes and provide professional development to staff (Hands, 2006). These additional responsibilities lead to workload intensification, with extended workdays engaging with multiple constituents, and increased work volume (Hauseman, Pollock, & Wang, 2017). At the same time, addressing structural issues, such as limited resources, is only one piece of the puzzle. As the ones responsible for influencing and shaping organizational culture (Donaldson, 2006; Leonard, 1999), administrators also need to attend to their schools' culture, ensuring that collective beliefs, values, and traditions are aligned with policy and implementation strategies (Hands, 2009). Moreover, teachers as well as principals are all potential actors in developing and implementing equity and inclusion policies (Ball et al., 2011; Clune, 1990). The ability to implement any policy is delimited by the implementers' skills and knowledge. In addition to being

instructional leaders and the lead learners, therefore, principals need to provide learning opportunities for their staff, which are also impacted by time, money, and material resources. Without considering structural, cultural, and agency issues together, implementing policy with fidelity in a sustainable way is unlikely (Datnow et al., 2002).

Readings and Activities Related to the Case

The following readings and activities are designed for graduate students, or for participants in principals' and system leaders' professional development workshops. A thorough discussion of the assigned readings, followed by an analysis of the case through conversation and participation in all of the following activities accompanying case, would likely take longer than the time allotted for a class or workshop session. The instructor might choose to select one or two of the following activities, depending on the focus of the session. The first activity is an introduction to structure, culture, and agency issues, while the two activities that follow have a focus on either structure and agency, or culture and agency.

1. Assessing the School Environment: Inclusion or Exclusion

It is advisable to have the students or participants read Schein (1995) to get a background on culture for this activity. As an organizational psychologist and a major contributor to our understanding of culture, it is a good idea to use his work as a foundational piece, even if you cannot locate this particular book chapter. Pollock's (2012) article focuses on the consideration for the contexts impacting students in particular, in order to engage them in learning. It also stresses the importance of involving families and community members—that is, making space for their agency—when considering strategies for enhancing inclusion and ultimately, student engagement.

Schein, E. H. (1995). Defining organizational culture. In J. T. Wren (Ed.), *The leaders companion: Insights on leadership through the ages* (pp. 271-281). New York, NY: The Free Press.

Pollock, K. (2012). Access, engagement, and community connections. *Teaching & Learning*, *7*(2), 1-15.

The following instructions could be given on a worksheet with the questions.

When deciding to make change within organizations, and identifying what needs to be changed, the first step is to assess the current environment. Examining issues of culture, structure, and agency are useful in this process. For this activity, you will be working in small groups (of three or four). When you consider the school's environment, assess it in terms of inclusion and exclusion.

Questions

1. Consider Sunnyview's culture. With reference to artifacts, beliefs, norms, and any other representation of culture: What elements or aspects of the culture promote inclusion, and what is the evidence of this (as demonstrated through artifacts, etc.)? Are there elements that result in the exclusion of some individuals, and what is the evidence of this?
2. Think about the structures in the school and district (e.g., a hierarchical system of authority, departmentalization of personnel due to job specialization, committees, policies, etc.). What structures are present that promote inclusion? What structures impede inclusion (or promote exclusion)? What structures are needed to promote inclusion?
3. What is the relationship between exclusion/inclusion and agency? Who is included in the organization, and in what ways? Who is excluded, and in what ways?
4. What instructional and assessment strategies could be implemented to promote the inclusion of those who are currently excluded? How could an inclusive environment be maintained? Consider both cultural and structural elements.
5. If you were Eric, what action plan would you put into place to reduce your work intensification and that of your staff? Are there ways to approach the current problems in the school to reduce work intensification? What collaborative structures within the school and classrooms could be developed to improve student achievement, and students' and staff members' well-being?

2. Role Play: Developing the Policies and Procedures Related to Inclusion

For this activity, students would benefit from reading Ball, Maguire, Braun, & Hoskins (2011), which provides an overview of the different actors and their impact on policy development and implementation. The article provides an understanding of the complexity around policy, and helps to explain why there is rarely a one-to-one correspondence between policy intent and implementation. While Ball and colleagues' (2011) article provides a framework for looking at policy intent, interpretation, and implementation, Coburn, Hill, and Spillane's (2016) article takes a look at these relationships in reference to a nation-wide educational policy in the United States of America.

Ball, S., Maguire, M., Braun, A., & Hoskins, K. (2011). Policy actors: Doing policy work in schools. *Discourse: Studies in the Cultural Politics of Education*, *32*(4): 625-639.

Coburn, C. E., Hill, H. C., & Spillane, J. P. (2016). Alignment and accountability in policy design and implementation: The Common Core State Standards and implementation research. *Educational Researcher*, *45*(4), 243-251.

In the presented case, there are no guiding principles, policies, or procedures at Sunnyview that would assist Eric and the teachers in implementing the government-level policy on inclusion, nor is there any evidence of a school- or board-level policy regarding the use of technology—assistive or otherwise. Through their participation in this activity, it is intended that students gain an appreciation for the challenges leaders encounter when trying to get agreement across multiple stakeholders with differing agendas. Once they have a firm grounding of their own vision for the school, they then need to focus on the four Ps—pupil, public, parents, and personnel—and be able to appreciate their different perspectives.

The following descriptions outline each stakeholder group, and their perspectives. The instructor could print out the descriptions and distribute them to each group once the activity is introduced.

Goal. In this role play activity, some of the main constituents have come together to develop a policy and procedure regarding inclusion and the use of assistive technology. The main goals are to develop a school-level policy for inclusion and student engagement that is consistent with province-level legislation, and to define a set of clear procedures to implement the policy. School leaders need to be able to articulate their own vision, but also consider and accommodate the perspective(s) of other stakeholders.

Problem. There are different constituents with different agendas that are, at times, in conflict with one another. This opposition is a common issue that arises when policy is being crafted. School leaders are in the position of attempting to accommodate multiple constituents; a failure to do so means that constituents who are not accommodated may not buy in to the policies and implement them as they were intended.

School administration. Your group represents Eric, and perhaps a leadership team, if you decide Sunnyview has one. You are policy "narrators" who interpret provincial policy for the rest of the school community, in order to build a vision for the school (Ball et al., 2011). You realize that the classroom equipment was not being used by all teachers, even when students need it. You are a policy "enthusiast" and, in attempting to engage others, you use whatever entrepreneurial skills you have (Ball et al., 2011). You are firm in your opinion: it is not enough that the school has assistive technology—it has to be put into use. You might want to ask some questions of the teacher(s) to identify whether it is an agency issue or a cultural issue, as your determination will shape the policy and implementation strategies. Is the problem a lack of opportunity to learn how to use assistive technology (agency, inclusion)? Or, if they have had learning opportunities, are teachers not seeking out them out, and, if so, why? You have gathered all of the major constituent groups (except students, which could make for an interesting point of discussion) for one purpose: to develop a policy or set of procedures that is in keeping with Ministry policy.

Teachers. You are a mixed group. Many of you are "lifers" who have taught at Sunnyview for 20 years or longer. For the most part, you started teaching before the technologies you are expected to use were available, and some of you continue to rely on paper and pencil tasks in your classrooms. You are in favour of inclusion, whatever that is, but you do not see that some of the students are excluded—if you did, you would change your practices. You do not see much point in crafting a policy around inclusion as a result. Also, some of you are absolutely opposed to a new policy (policy "critics"), as you feel it will likely force you to engage in technology PD that you do not want, for various reasons. In contrast, some of

you are early career teachers, who could be considered "receivers" (Ball et al., 2011). You rely on others to interpret policy and develop procedures, but you are happy to put them into practice. You are using adaptive technology, as well as other technology in the classroom to engage your students. You want to see more technology in the classes, and would welcome any policy or procedure that would allow you to have access to more technology and professional development that is relevant to your skill level. The PD that Eric has offered to send staff to is a course, or workshop, put on by the board every now and then, and you have either taken the PD already, or you do not think it is relevant to your class.

Union Representative and/or Union Steward at the school. You are a policy "critic" and are looking at the implications of the policy beyond its intended outcome(s) (Ball et al., 2011). You are concerned about the time and resources required of the teachers to develop and implement the policy, particularly if teachers are being asked to change their teaching practices. You are aware of the complaints from some teachers about being pressured to use technology in the classroom when, in their professional judgment, it is not needed. Based on what the members of the teacher group say, you support their views, with an interest in preserving their professional autonomy.

Superintendent and/or Ministry Representative. You are a policy "transactor" responsible for ensuring that the policy is implemented, and there is a level of accountability at the school (Ball et al, 2011). You have an interest in ensuring that the government-level policy (such as the Ontario Equity and Inclusive Education Strategy) is implemented, and that there is some way to measure implementation outcomes. You are less concerned with the actual implementation plan, but ask the questions:

- "How will you know you have achieved an equitable situation?"
- "What does inclusion look like?"
- "How frequently will you assess your progress?"

The superintendent is also interested in making sure the standardized test scores go up. As superintendent, you will want to know how the implementation of the policy will impact on all students' achievement, as well as the specific gains in achievement you can expect at the end of the principal's second and third year as school leader.

Parents. Your group can agree that you want to make sure teachers are doing thier jobs and educating children. You are supportive of the school, but communication is lacking. Some of the questions your group asks are:

- "Why is the council finding out at the end of the year that not all of the students have access to technology that they need when the council fund-raised for the equipment?"
- "Why are parents finding out that their children are having problems at the end of the academic year? Where is the consistant communication?"
- "What about resources for teachers? Why aren't there enough EAs? SERTs?"
- "What are we paying our taxes for?"

Many of you feel you should have more say in consequences for teachers at the policy implementation stage, regardless of the policy that is developed. A few of you note that some parents on the council have agendas that are focused on *their* children—they want to get rid of a teacher, for example, because their child did not do well in the class/did not like the teacher. At least one of you wants to know how the policy impacts children identified as gifted. You observe that the whole focus is on students with academic challenges, but with all due respect, there is nothing being done for those who excel, or could excel if they were not languishing in the class while teachers cater to children who are less capable.

Community members. You are a mixed group, comprised of representatives from diverse organizations with an interest in youth well-being, academic achievement, equity and accessibility, or technology, for example. You could have a member from a university faculty of education with a specialization in tech ed or special education, one from Public Health (liaison from the Healthy Schools division, for instance), one from Boys and Girls Clubs or the YMCA after school/ homework program, one from a non-profit community organization that champions accessibility issues, and one from a tech company that develops the assistive technology. As "outsiders", you are not directly impacted by the policy, but you may need to act in a consultative capacity during the discussion, depending on your expertise (Ball et al., 2011). Depending on the direction of the discussion, you will provide advice on the policy and procedures being developed at various points. Some of you will comment on accessibility issues, the appropriate technology and its use, or the likely impact of aspects of the policy or procedure.

3. Leadership Strategy: Creating Learning Communities

Professional learning communities have been touted as cost-effective and a promising way to building knowledge and skills among group members. These communities are used broadly in Ontario and in other parts of the world. That said, all initiatives for change require time, money, and energy to put into place. This activity involves having the participants work in small groups, or leadership teams, to develop learning opportunities for the teachers in the presented case. It would be beneficial to first have the participants read Mitchell and Sackney's (2016) article, which will give them a deep understanding of professional learning communities (PLCs), and the contextual considerations for their success. The Rodrigue et al. (2012) article provides a framework of activities that take place within actual blended PLCs. It highlights ongoing professional development work within the Elementary Teachers Federation of Ontario, which has a focus on technology—not only in terms of PD delivery, but also in terms of content.

Mitchell, C., & Sackney, L. (2016). School improvement in high-capacity schools: Educational leadership and living-systems ontology. *Education Management Administration & Leadership, 44*(5), 853-868.

Rodrigue, A., Hyland, N., Grant, J. M., Craig, A., Hudon, M., & Nethery, C. (2012). Exploring Facilitation Stages and Facilitator Actions in an Online/Blended Community of Practice of Elementary Teachers: Reflections on Practice (ROP). In S. Van Nuland, & J. Greenlaw (Eds.), *Social media & teacher learning* (pp. 71-81). Oshawa, ON: UOIT E-Press.

While this activity could be a stand-alone activity, it builds on the previous two activities by giving participants the opportunity to consider the cultural changes that are needed, which were first introduced in Activity 1. This activity then encourages an examination of the relevant policies that are to be put into practice, which was part of Activity 2. The main task in this activity then focusses on the knowledge and skill leaders need to develop among staff to promote cultural change and policy implementation in ways that are consistent with their intended purpose. Regardless of the specific policy to be implemented, these are common goals at the school level, and professional learning communities are one way to achieve them. For this activity, it would be beneficial for the participants to be divided into small groups of three or four. The following descriptions are to be provided to the groups and are intended as a guide for participants as they work in their groups to build knowledge and skills among the case study's faculty and support staff at Sunnyview.

Developing Skills and Knowledge in Sunnyview

Goal. The Purpose of this activity is to develop knowledge and skills in Sunnyview's staff through collaborative learning.

While it is most appropriate to involve all members of any learning group in the identification of the learning foci so there is a collective ownership over the decisions made, this activity focusses on the leadership team and is intended to give you insight into the considerations for developing collaborative learning. In your leadership teams, you have the task of developing a plan to provide learning opportunities for the staff at Sunnyview. To do so, you will need to consider several issues:

Creating a culture that supports collaborative learning. What kind of school culture is needed to develop collaborative learning? Does Sunnyview have a culture that would enable PLCs? If not, what specific steps does the leadership team need to take to create a collaborative culture? Once there is a culture that supports collaboration, what steps are needed to promote the type of conversations that push members to reflect on their practice with a critical eye and an intent to learn from others?

Contextual (structural) issues that impact the learning focus. What policies and initiatives are relevant and need to be considered in the focus of the PLC? For example, if the school board has goals of wellness, equity, and achievement, how do they impact the work of the PLC?

Collaborative learning in teams, or PLCs, only happens if time is freed up for them to work together. How will you enable teachers to meet with one another during the workday?

Components of PLCs: focus, collaborative inquiry, leadership

Task. Outline a plan for a PLC at Sunnyview. In addition to the previous questions, you may want to

use the following questions as guides when you develop your professional development plan for the staff.

- What are the capacity issues among the Sunnyview staff? What is it, specifically, that they need to know and learn to do?
- Who is in the PLC? Are there some teachers with the needed skills already? In what capacity might they be included in the PLC?

Collaboration consists of story-telling and scanning the environment (and other colleagues) for ideas, sharing materials and resources, asking questions and responding with assistance to others' questions and requests for aid, and sharing responsibility for work (Little, 1990). What encouragement and opportunities can be provided to Sunnyview staff to collaborate? What would their collaboration look like?

PLCs may not have consistent membership at all times, and members might take on different roles at different points, depending on their knowledge and skills. At times, members also need to seek expertise from outside the PLC. Who would seek them out, and how?

As principal, Eric is a formal leader, but others can take on informal leadership roles in the PLC. Who might take on leadership roles in the PLC, and when? How would families and community organizations be included in the work? In what capacity?

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