Managing Change
A Guide to Implementing Change in Schools

Managing Change: A Guide to Implementing Change in Schools

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Contents

Synopsis (Purpose of the Guide)

This guide is intended to assist with building the capacity of staff who view themselves as, or desire to be, change agents in schools. Background information related to educational leadership helps the reader consider how they might put theory into practice. A case study is shared as an example of how change agents may implement changes in schools using the Concerns-Based Adoption Model (CBAM). The case study focuses on the implementation of common course outlines in an Ontario secondary school. The reader can expect to learn how Innovation Configurations, Stages of Concern, Levels of Use and Leadership Surveys can be applied to assist with implementing common course outlines in secondary schools. The case study's results reveal that a great deal of resistance was noted when it came to implementing common course outlines, school wide. The reasons for this varied but often it was due to the feeling that staff lacked the skills and/or time to do so. Thus, it is evident that there is a need for principals to create a culture of change in schools as well as to provide change agents in schools (formal or informal leaders) with proper training, support, and the interpersonal skills needed to implement complex changes in schools.

Introduction/Background

Leading changes and implementing changes effectively in schools is a complex process that requires strong leadership skills, patience, and time (Holmes et al., 2013). The process by which change is implemented in schools has evolved over time. As a result of studying educational leadership, research has revealed what it means to be an effective leader as well as how leaders can effectively implement school-based goals and mandated initiatives from the ministry or board level. Moreover, the literature reviewed ascertains that "recently, there are moves to decentralize decision-making in schools by allowing principals greater autonomy in terms of budgets and expenditure" (Holmes et al., 2013, p. 274). As a result of this shift, there has been a need to develop principals' leadership skills so that they can be effective at implementing initiatives. Importantly, although principals are regarded as the leaders in a school, teachers often act as very effective change agents in schools (Holmes et al., 2013, p. 270). For instance, Van der Heijen et al., (2015) highlight the characteristics of teachers as change agents as follows: being eager to learn; being reflective; giving guidance to others; being accessible to others; having a positive attitude; being committed to education, students, and their professional development; being regarded as trusting; self-assured and confident in their profession; being innovative and open to trying new things; being responsible; and collegial/collaborative (pp. 688-689). When principals and teachers/staff work together collaboratively, change initiatives can be implemented more effectively since tasks can be distributed and teachers can utilize moments of spontaneous collaboration to move goals forward in a meaningful and authentic way (Harris et al., 2007).

THE GUIDING PRINCIPLES THAT "VIRTUALLY EVERYONE HAS SOME CAPACITY TO FORM LEADERSHIP RELATIONSHIPS, AND (II) LEADERS ARE MADE AND NOT BORN" PROVIDE HOPE FOR SCHOOL LEADERS WHOSE GOAL IS TO EMPOWER STAFF AROUND THEM TO BECOME POSITIVE CHANGE AGENTS IN THEIR SCHOOLS AND COMMUNITIES (GANDOLFI & STONE, 2017, P. 20).

Managing Change: A Case Study

Theory into Action: Implementing the Use of Course Outlines in an Ontario Secondary School

In September 2022, an Ontario high school experienced a full change of administrators. This resulted in four new administrators joining the school and with no historical knowledge of the school culture, staff, or practices. Once the first semester started, the administrators started to notice that when staff were asked to submit course outlines to the office, very few course outlines were submitted. Despite sending email reminders to staff about the deadline to submit the course outlines, few course outlines were submitted to the office. The Vice Principal began to ask some of the Department Heads to follow up with members of their departments to collect the course outlines and received surprising responses. The Science Department Head, for example, responded by saying that they would submit the course outlines if the admin provided a template for them to follow. This information led the administrative team to wonder if the teachers at the school were familiar with the importance of making course expectations transparent to parents.

Growing Success states that (2010):

It is essential that schools have procedures in place to ensure that parents are aware of the expectations for their child in the various grades. Principals play a key role in developing these procedures, which should be designed to create the conditions for student success by ensuring that parents have the information they need to interpret their child's report card and to work with teachers to improve their child's learning (p. 8).

In addition to having conversations with staff about instruction and assessment practices, administrators also heard from parents and students about their concerns (e.g., student and parent/guardian voice data) around grades and assessment practices at the school. A number of parents shared concerns about lack of transparency regarding assignment expectations and how teachers determined final grades. Overall, the observations and conversations that administrators took part in led them to believe that it was essential to implement changes to the assessment practices at the school, making them more transparent to students and families so that they aligned with the ministry's expectations around being transparent with parents and students about students' learning.

The proposed change initiative of this project involved the implementation of a common course outline for all courses across the school. Teachers were expected to utilize a *common course outline template* to create course outlines for each of their courses that would be shared openly with students and families. This practice would help ensure that students and families have a clear understanding of the knowledge and skills that students will be expected to develop as well as how they will be assessed on their learning in the course.

To implement this change initiative effectively, it is recommended that the change facilitator style that is referred to as the *Initiator* by Hall & Hord *(2020),* be utilized by school leaders. The *Initiator* is similar to transformational leadership and distributive leadership since this change facilitator style involves holding high expectations for staff and students while being kind in their approach

As stated in Growing Success (2010):

The policy is based on seven fundamental principles, the first of which tells us that assessment, evaluation, and reporting practices and procedures must be fair, transparent, and equitable for all students. At the same time, students and parents need to know that evaluations are based on evidence of student learning and that there is consistency in the way grades are assigned across schools and boards throughout the province (p. 2).

(Hall & Hord, 2020). In addition, *Initiators* involve staff in the decision-making process and will use staff input when it aligns with the vision and goals of the school and/or board initiatives (Hall & Hord, 2020). Various change models can be utilized by change agents to move initiatives forward. For the purpose of this guide, the Concerns-Based Adoption Model (CBAM) is highlighted as a way to help school leaders and change agents learn how to act on change initiatives effectively (Hall & Hord, 2020). CBAM is regarded as an effective change model since it:

1. helps change agents clearly identify, clarify, and communicate the change to their target audience via the use of Innovation Configurations.

2. uses Stages of Concern to assist change agents with understanding how the target audience feels and/or perceives the proposed change.

3. Aids change agents with understanding Levels of Use and how to recognize the "characteristic behavioural profiles of implementers" (Hall & Hord, 2020, p. 64).

Learning and reflecting on studies related to change leadership is important since it helps individuals understand what it means to be a positive change agent as well as how individuals can develop the skills, attributes, and characteristics needed to be an effective leader of change (Holmes, K., Clement, J., & Albright, J. (2013).

The guiding principals that "virtually everyone has some capacity to form leadership relationships, and (ii) leaders are made and not born" provide hope for school leaders whose goal is to empower staff around them to become positive change agents in their schools and communities (Gandolfi & Stone, 2017, p. 20).

Concerns-Based Adoption Model (CBAM) & Leadership Surveys

CBAM IS MADE UP OF "THREE EVIDENCE-BASED CONSTRUCTS AND MEASURES FOR UNDERSTANDING, FACILITATING, AND EVALUATING CHANGE PROCESSES BEGINNING AT THE INDIVIDUAL LEVEL. [...] THERE IS A PERSONAL SIDE TO CHANGE (STAGES OF CONCERN), AND THERE ARE STEPS IN MOVING FROM NONUSE TO NOVICE TO EXPERT (LEVELS OF USE). ALSO, COMPLEX CHANGES ARE NOT LIKELY TO BE IMPLEMENTED INITIALLY WITH HIGH FIDELITY. INSTEAD THERE WILL BE ADAPTIONS AND PRACTICAL IMPLEMENTATIONS (INNOVATION CONFIGURATIONS). EACH OF THESE CONSTRUCTS CAN BE APPLIED TO INDIVIDUALS, GROUPS, AND WHOLE ORGANIZATIONS. EACH REPRESENTS ON-THE-GROUND PERSPECTIVES" (HALL & HORD, 2020, P. 165).

School Leaders/change agents can use the Concerns-Based Adoption Model (CBAM) to mobilize change initiatives at the school level with more success and efficiency. For support and guidance with putting CBAM into action, school leaders/change agents are encouraged to review how the Innovation Configuration, Stages of Concern, and Levels of Use were utilized in the Case Study, below.

Innovation Configuration

An Innovation Configuration was utilized to further understand the assessment practices at an Ontario school. It was decided that the use of common course outlines had to be examined once administrators learned, via conversations with students, that teachers had not been providing students or their families with course outlines. This called into question whether teachers' practices were transparent to students, thereby equitable to students. Thus, the innovation configuration was utilized to help implement the development of common course outlines, using templates, across the school. The purpose of this change was to help ensure that course learning goals are clear to students and

families as well as how students can work to be successful at the course. In addition, they will help to demystify the assessment processes of students since teachers are expected to communicate the expectations of assignments to students in a clear and transparent manner, as expected in Ontario's Growing Success. The goal is that the innovation configuration (see Appendix A) helps teachers see what they can do to improve their assessment practices so that they are more transparent, fair, and equitable for students.

Stages of Concern: Two Legged Interviews

Two legged interviews were conducted in person as teachers passed through the halls or office. All five participants were teachers who I had just met this year since I am a new administrator to the school. Three of the teachers have over 15 years of teaching experience, one teacher has 5 years' experience, and one teacher has 2 years' experience. After reviewing the change initiative with participants, participants were asked to share some of the strengths of the initiative as well as some of the challenges that may be encountered during the process of implementation.

An analysis of the responses collected from the two-legged interviews with teacher participants revealed the following strengths of the initiative: students and families would be provided with a more consistent understanding of school expectations, course assessment practices, and the key learnings from the course. On the contrary, 60% of the participants identified lack of time as a barrier to being able to implement this change. Participant one shared that they had concerns about this change creating conflicts amongst colleagues who may disagree on assessment breakdowns for their courses and/or plans for final evaluations. Participant three also shared that they were concerned that students would feel empowered to argue their marks once the mark breakdown was provided on a course outline for them to refer to. Participant 4 was a newer teacher, in her fifth year of teaching. She shared that she felt frustrated by the resistance regarding implementing common course outlines since she felt it was an obvious first step for outlining the goals of the course for students.

Stages of Concern: Open-Ended Concern Statement

The open-ended concern statement was created online using a Google Form and was anonymous to ensure participants' feelings of safety. The open-ended concern statement that was shared with participants was: "When you think about implementing the use of a *course outline template* to ensure consistency, school-wide for course outlines, what concerns do you have? Please note that your responses are anonymous to help ensure participants feel safe to share their thoughts openly and honestly.

Appendix B highlights the stages of concern and the concerns that participants had regarding this change initiative from each stage. As highlighted in Appendix B, many of the participants (8) felt that a major barrier was the lack of time provided to teachers to create the course outlines.

Levels of Use

Research has made it evident that it is important to develop a culture of change in a school in order for the innovation (e.g., development of common course outlines) to be implemented successfully. For example, in reforming schools, student learning and the innovations that are attempted to be implemented to support student achievement depend on teachers taking the necessary actions in their classrooms, with students. Moreover, if teachers do not provide students with course outlines, the course expectations will not be made explicit to students and their families. Moving away from using individually designed course outlines aligns with Miller's (2005) explanation of how re-culturing teaching requires that teachers replace "the individualism, isolation and privacy of traditional schools in favour of new norms of collegiality, openness, and trust" (p. 250). The innovation that the case study focuses on involves Curricular Heads coming together as part of the Leadership Team to "decide on common goals" and to ultimately agree upon a common school-wide course outline *template* that would be used by teachers, as a starting point, to base their own course specific course outlines on. Overall, educational research has helped to affirm the fact that "Change in teaching, like all change, is "a process, not an event"" (Miller, 2005, p. 252). It is important for school leaders to recognize that as a process, time will be needed to reach a level of full implementation. This

takes time, patience, support, and resources and cannot be done by one individual person. It is a team effort!

As noted by Hall & Hord (2020), to establish a culture of change in schools, school leaders must help reduce isolation of staff, increase staff capacity, provide a caring and productive learning and working environment, and promote increased quality (205).

Leadership Surveys

Effective School leadership requires that individuals develop the knowledge, skills, behaviours, and attitudes necessary to implement complex changes with individuals who have various beliefs, lived experiences and diverse backgrounds. As you may expect, this is not always an easy undertaking. However, implementing complex changes is possible and most efficient if leaders take the time to assess their leadership skills for the purpose of improving their effectiveness as a leader. More specifically, *The Change Facilitator Style Framework* identifies the three main components of change leadership to include: concern for people, organizational efficiency, and strategic sense (Hall & Hord, 2020, p. 173). Various leadership surveys are available to help change agents and/or those who desire to become change agents, identify their strengths as a leader and areas where they could improve developing their leadership skills and abilities. Examples of leadership surveys that were utilized in the case study include the *Leadership Practice Inventory* and *The Change Agent Skills Questionnaire.*

Case Study Discussion & Results

An analysis of the results reveals that most participants who responded to the two-legged interview and the open-ended concerns statement have concerns related to the management aspects of the change (e.g., not having enough time to do the work). Interestingly, contrary to the arguments presented by Hargreaves (2005) that mainly younger teachers find "themselves isolated and

unsupported, prone to concentrate on survival", early career teachers and late career teachers both shared concerns about time constraints during two legged interviews (p. 971).

Due to the anonymous nature of the responses from the Open-Ended Concern Statement, it is not possible to determine how a teachers' age may impact their beliefs and/or responses to changes. This anonymity is a limitation to the research since it does not allow further exploration into how a teacher's age, the culture within a specific department, etc. may influence their responses to changes. Although the majority of participants from the Open-Ended Concern Statement expressed task concerns related to the change initiative (8/12), since the concern statement was open-ended, participants may not have addressed the concerns that they had related to "efficiency, organizing, managing, scheduling, and time demands" (Hall & Hord, 2020, p. 107). One of the participants (a new teacher) was identified as falling into the refocusing stage of concern. This participant was actively seeking ways to maximize the benefits gained from implementing the common course outlines across the school which supports Hargreaves' (2005) assertion that younger teachers are more inclined to experiment and try new teaching approaches.

Interventions to facilitate change must be aligned with the concerns of those who are engaged with the change" (Hall & Hord, 2020, p. 105).

It is important to identify where individuals are at with their implementation of an initiative and how they feel and/or perceive the change so that appropriate support can be provided to assist with moving the change forward. Depending on the target participants' level of use (see Appendix C), will depend on a change agent's best next steps. For instance, with regards to the case study examined, for individuals who are identified as Level I users (Orientation), it will be important for change agents to take the time to build a shared vision and/or understanding with target individuals regarding why the

change is important and how it fits into previous work and/or learning (Hall & Hord, 2020, p. 58). Change agents such as school committee leads, Curricular Heads, Vice Principals/Principals, and/or Resource Teachers can help the target participants (teaching staff) develop a "clear mental image of the change as it is expected to appear after its high-quality implementation" (Hall & Hord, 2020, p. 58). Staff who are identified as Level II users (Preparation) will require "time, space, materials, and human resources" to create a plan for how they will meet the goals of the initiative and to identify what they will need to follow through with the goal (Hall & Hord, 2020, p. 58). For instance, principals could prioritize building time into early release days, Professional Learning days, or staff meetings so that staff can have time together to brainstorm a plan for how they will meet the goals of the initiative as well as what they will need. It will be important for change agents to ensure that they capture the needs shared by staff so that they can do their best to meet their needs so that the initiative can move forward. Furthermore, in order to best support individuals who are identified as Level III users (Mechanical Use), it is important for change agents and school leaders to invest in the learning that is needed to continue to move the initiative forward. The needs that are shared by Level II non-users may also help guide what learning will need to take place for Level III users. For example, with regards to the case study, school leaders can provide structured time for teachers to collaborate and work on developing their course outlines at a staff meeting where the administrators could circulate and support. Curricular Heads could also be taught how to create effective course outlines and then empowered to lead their departments through the co-creation of the course outlines. This will help ensure that staff members feel safe and supported so that they do not feel alone in the process of creating course outlines. Department release days could be provided to support Department Heads with this work and to help bring staff together more easily as well. If Department Heads take this leadership approach it will also help ensure that teachers who are teaching courses with multiple sections have collaborated and come to a consensus about their course outlines. This practice will ensure that there is consistency for the students taking the course and will cut down on parental/guardian complaints. If staff are identified as Level IVA (Routine) and IVB users (Refinement), it will be important for change agents and/or school

leaders to check on the progress of all staff since "what gets monitored gets done" (Hall & Hord, 2020, p. 59). School change agents can utilize Curricular Heads or Resource Teachers to support with monitoring where staff are at with regards to implementing the change initiative and what the next steps should be. For example, "implementation assessment reports" could be collected by all Curricular Heads and/or by the Resource Teacher to provide updates on how implementation of the change initiative is progressing (Hall & Hord, 2020, p. 59). Principals and Vice Principals can also take advantage of opportunities such as teacher evaluations and annual learning plans as a method to hold staff members accountable for utilizing a course outline in their courses. If the data indicates that staff are Level V users, the function of the change agent/school leader will be to commend them for their efforts, recognize their achievements, and provide continuous assistance with their next steps. Lastly, when staff are identified as Level VI users, the role of the change agent/school leader will be to continue to provide a supportive culture of change where target individuals (school staff) are able to build trusting relationships and are recognized and appreciated for "giving time, attention, and energy to the school's efforts to improve" (Hall & Hord, 2020, p. 57).

When things fail or go wrong, [LEADERS] need to help individuals to see it as an opportunity for learning, changing, and trying again" (Hall & Hord, 2020 , p. 57).

After reviewing literature that focused on transformational leadership, I do believe that the *Leadership Practice Inventory* results are accurate with regards to assessing leadership practices. I appreciated that this questionnaire was based on research related to the Five Practices of Exemplary Leadership since it helps leaders to reflect on leadership skills specific to those required of effective transformational leaders. Ganolifi and Stone (2017) support the validity of Kouzes and Posner's (2017) research since they reference the five key attributes of effective leadership in their research.

Considering the fact that transformational leadership involves influencing people, a weakness of the questionnaire is that it does not assess the leadership behaviours required to be an effective transformational leader (Berkovich & Eyal, 2016). This questionnaire could be strengthened by including questions that helped identify the leadership behaviours that an individual poses as well as the leadership behaviours that they can work on developing further. Thus, based on the evidence provided by Berkovich and Eyal (2016), all school leaders can benefit from completing leadership behaviour inventories in order to assess their emotional intelligence skills and how they relate and respond to others. The *Leadership Practice Inventory ques*tionnaire can be used effectively as a self-reflective tool for school leaders who may want to assess where their strengths are as leaders and how they might be able to improve their transformational leadership skills. Since not all effective school leaders act as transformational leaders, it is recommended that this tool be used with other leadership style questionnaires. As noted by Gandolfi and Stone (2017), "Whether one believes that leaders are born or made, scholars and practitioners agree that leadership involves influence regardless of the chosen inherent style" (p. 21). Thus, every leader will develop their own unique leadership style which may include attributes from various leadership models rather than one specific model. This is why it is important for individuals to use various tools as self-reflective tools for the purpose of determining the best next steps for their professional development and personal growth.

The *Change Agent Skills Questionnaire* can be useful since it focuses on having participants self-reflect on the 18 key change agent skills. A strength of this questionnaire is that in addition to assessing the overall professional skills needed to be considered a change agent, it also assesses individuals' interpersonal skills which are necessary for building relationships and influencing people. Furthermore, a strength of the questionnaire is that the rating scale used in the questionnaire includes a reflective question, "How would you rate your capacity?" (Kouzes, J. M, & Posner, B. Z., 2023). Focusing on an individual's perceived capacity is important since it highlights the fact that these skills are developing and can continue to improve. A small change that could enhance this questionnaire would be to adjust the descriptors that are used for the rating scale. For instance, instead of using the

rating scale descriptors as *none, slight, some, considerable, and high*, ratings such as *not yet developed, beginning to develop, emerging skills, developed, and mastered* could be utilized instead. Participants would be positively impacted by making this small revision since the suggested rating scale descriptors promote a growth mindset rather than a fixed mindset. A criticism of this questionnaire is that the descriptions of each of the change agent skills are rather vague, despite their complex nature. In addition, some of the skills under some of the categories seem to overlap. For example, with regards to Kouzes, J. M, & Posner, B. Z.'s (2023), "Training/doing workshops", which falls under the General Skills, one could argue that doing workshops and training others requires collaboration skills. If participants understand this to be true, then collaboration can be viewed as overlapping as a skill since it is also listed under the Specific Skills -Interpersonal category.

Professional Leadership Reflections

In order to learn and understand more about strategies to support leaders with implementing change initiatives, I decided to utilize the *Leadership Practices Inventory* and the *Change Agent Skills Questionnaire* since these were designed to be used as self-reflective tools. The goal of completing these leadership surveys was to help me understand my strengths as a school leader as well as potential areas of growth. More specifically, I was interested in finding out what the results of the *Leadership Practices Inventory* would be since reviewing the literature from the course made me believe that I possessed transformational leadership skills and that these came quite naturally to me.

Since a great deal of the educational research revealed the importance of acting as a change agent and/or building relationships with staff to empower them as change agents in the school, was drawn to completing this questionnaire to see what the results would reveal. All school leaders are encouraged to use similar leadership surveys to get a sense of their own strengths and weaknesses as well.

As I reflect upon the findings of the *Leadership Practices Inventory,* I feel that the results are very accurate, overall (refer to Appendix D: *Leadership Practices Inventory* Findings). In the past I worked as an Instructional Coach which provided me with the opportunity to develop the skills that are required of transformational leaders. For example, as an Instructional Coach our role was to model effective practices for staff on a regular basis (Model the Way), work with principals to develop School Success goals (Inspire a Shared Vision) and motivate staff to set personal goals in order to help move the school-wide goals, forward (Enable Others to Act). I have always been very comfortable with building relationships with staff, students, and families and am not surprised to see that the Encourage the Heart category is high. The one area that does surprise me the most is the Challenge the Process findings (refer to Appendix D: *Leadership Practices Inventory* Findings). I am surprised to see that this area scored 8.8/10 since this is an area that I am least confident and comfortable in. More specifically, I believe that I am quite competent when it comes to exploring innovative ways to change the status quo in order to make the

Authentic Leadership & the Power of Reflection

"The authenticity of leadership in contemporary research refers to the nature of self-aware individuals practicing higher moral leadership" (Abbas et al., 2020, p. 5861).

outcomes and experiences of students the best that they can possibly be. I am least comfortable though with experimenting or taking risks if it upsets people. This is definitely an area I need to focus on strengthening since I take staff responses to changes quite personally and it becomes emotionally taxing on me.

I found the *Change Agent Skills Questionnaire* by Miles, M., Saxl, E., & Lieberman, A. (1988) to be well organized with effective use of headings. However, I found the descriptors of each specific skill to be vague and believe that some of the descriptors left too much room for interpretation which could skew the results. For example, with regards to interpersonal skills, the criteria *confrontation* is listed and described as "Can give negative information or mediate a negative situation without generating a negative affect" (Miles, M., Saxl, E., & Lieberman, A. (1988). Since this is a self-reflective questionnaire, the answer to this question would depend on the individual's ability to perceive the emotions of others effectively. This requires that they have average-high emotional intelligence skills. It is unclear if the results from some of the questions on this survey would be accurate since it is a self-assessment. The self-reflective open-ended questions were helpful at encouraging deeper thought regarding my strengths and areas in need of improvement/development. For example, although my scores were very similar, I reflected on the scores and noted that my strengths involved my ability to build trust and rapport. My most notable area of growth included building others' sense of self and mediation skills (refer to Appendix E: *Change Agent Skills Questionnaire* Findings).

If the Open-Ended Concern Statement were to be done again, I would like to include an anonymous checkbox so that participants can identify if they fall into the category of early career, mid-career, or late career teacher. I recognize that identifying which stage of the career they are at takes away from the anonymity of the data. However, after reflecting on the results gathered, I feel that understanding which stage of career the teacher is at would be beneficial when comparing the responses to Hargreaves' findings (2005). If I were to do this exercise again, I would try to select a variety of teachers from various departments in the school since the culture within departments tends to influence teachers' beliefs a great deal. I would find it interesting to compare department data in

order to identify if there is a trend amongst specific departments and if greater impact could be gained by targeting specific departments. The exercise of collecting data regarding staff members' concerns has helped me learn an effective process for identifying the needs of staff. Identifying the needs of staff and their concerns is a necessary first step so that administrators can assess whether or not the implementation plans need to be adjusted. Assessing the concerns and needs of staff is essential for effective change since staff will resist engaging in the work if they are not feeling supported or able to complete the expectations that are put on them.

Implications for the future include utilizing transformational leadership practice surveys, transformational leadership behaviour surveys, and/or change agent surveys with student-teacher candidates, with teachers during teacher evaluations if they are considering leadership roles in the future, with administrators during professional development sessions and/or with aspiring leaders (McCarley et al., 2014). In addition, "Workshops, training, professional learning communities, and book studies could be avenues for educating administrators on transformational leadership attributes" (McCarley et al., 2014, p.336). Gaubatz and Ensminger (2017) also suggest that "academic department chairs might benefit from professional training that would increase their efficacy as change agents" since they have a great deal of influence amongst their department members (p. 159). In addition to training department chairs on their role as change agents, Acton (2020) highlights the need to educate principals, system-wide, on how to effectively implement, measure, and monitor changes. Acton (2020) argues that, "Change agent instruction for principals should occur at various points during their career- pre-principal development courses, in-services for novice principals, as well as ongoing professional learning sessions for experienced administrators" (p.49). In summary, change is constant and complex. In order to implement change successfully in schools, school leaders (informal or formal leaders) require proper training, support, and the interpersonal skills to work with others since implementing change is a collaborative process. Self-reflective processes such as research-based questionnaires or surveys can be a very effective way to assist school leaders with beginning to identify any gaps in understanding and/or areas in need of development.

Thus, the research provided by Mohammad et al., (2020), Mc Carley et al., (2014), and Berkovich & Eyal (2016) prove Kouzes and Posner's (2017) leadership questionnaire (*Transformational Leadership Practices*) to be valid, reliable, and relevant to educational leadership. More specifically, the research findings from Mohammad et al., (2020), Mc Carley et al., (2014), and Berkovich & Eyal (2016) support the argument that effective transformational leaders need to possess the 5 core practices of transformational leadership, as highlighted by Kouzes and Posner's (2017) in the questionnaire (modeling the way, inspiring a shared vision, challenging the process enabling others to act, and encouraging the heart). A limitation to Kouzes and Posner's (2017) questionnaire is that it does not help leaders reflect on *how* they work to "inspire, manage, and persuade students and teachers to positively transform schools" (McCarley et al., 2014).Mohammad et al., (2020) ascertain that "transformational leadership behaviours will enhance employees' trust in their leader, which, in turn, will transform into their oneness with the organization and continuous improvement" (p. 932).

The research findings presented by van der Heijen et al., (2015), Gaubatz and Ensminger (2017) and Acton (2021) provide concrete evidence for why the 18 key change agent skills were focused on in Kouzes, J. M, & Posner, B. Z.'s (2023) questionnaire. More specifically, van der Heijen et al., (2015), like Kouzes, J. M, & Posner, B. Z. (2023) define a change agent as one who is able to build trust with others, is innovative, collaborative, confident in their abilities (e.g., Master teacher), reflective, empathetic, accessible to others, and committed to the success of students and the school community. Therefore, it is evident that the self-reflective questionnaire designed by Kouzes, J.M, & Posner, B.Z. (2023) is based on research and is effective at assessing individuals against criteria that is relevant to that of a change agent.

Conclusion

As stated earlier, change takes time and patience. The research reveals that it is important for leaders to continually reflect on their leadership style in order to become as effective as possible at implementing complex changes. The Transformational leadership style is like that of an Initiator (as defined by Hall and Hord, 2020) and is noted to be the most effective leadership style. It is recommended that change agents complete leadership surveys to identify their strengths and the areas that they improve on in order to possess the leadership skills of an Initiator. Importantly, leaders and change agents do not require a formal title to have a large impact. Principals, Vice Principals, Curricular Heads, Committee leads and members, parents, volunteers, etc. can all have a large impact on the school community if they make a commitment to taking action in order to put positive changes in place that can be sustained over time. Regardless of one's role, it is important for change agents to be able to build trust with others, be innovative, be collaborative, and confident in their abilities to make positive change happen. Effective change agents are reflective, empathetic, accessible to others, and committed to the success of students and the school community (Kouzes, J. M, & Posner, B. Z., 2023).

Currently, the change initiative that was a focus of the case study (implementing common course outlines in an Ontario secondary school) is still in progress. The change agents who are responsible for mobilizing this change are the Vice Principal and three Curricular

The 5 core practices of transformational leadership include:

1. modeling the way
2. inspiring a shared vision
3. challenging the process
4. enabling others to act
5. encouraging the heart

~Kouzes and Posner's (2017)

Heads who make up the Assessment and Evaluation Committee at the school. All Curricular Heads

(ten in total) and staff (90 in total) have been provided with time, a course outline template to refer to,

and support from the Assessment and Evaluation Committee during staff meetings to complete these

course outlines. The results of the Innovation Configuration reveal that most staff have not yet taken

the necessary steps to begin this work. Some staff (a quarter of the staff) are in progress. Some staff

have utilized time at staff meetings effectively and have revised their course outlines using the

template provided. Surprisingly, a great deal of resistance for engaging in this work has come from two

specific Curricular Heads as well as their department members (Science and Math). Teacher

observations, evaluations, and discussions with students reveal that the Science and Math

department's assessment practices are not very transparent, and students do not have a clear

understanding of how they are graded and/or how the courses are organized. Teachers have informed

administrators that they are currently using old versions of course outlines but these have not yet been

submitted or shared with administrators to review. Interestingly, despite offering staff time release, time

at staff meetings and during professional learning days to complete common course outlines using the

school provided template, 66% of staff surveyed revealed that they had major task management

concerns (refer to Appendix B: Stages of Concern Findings). The concerns mostly stem from staff

feeling that they did not have the time to complete these. An analysis of the Levels of Use findings

revealed that most teachers are currently considered to be non-users or in the preparation stage (Level

of Use II). Thus, this suggests that providing more time, without the necessary supports for staff, will

not be effective. It is recommended that the school principal and Assessment and Evaluation

Committee take time at an upcoming staff meeting to gather feedback from staff about what they feel

they need to complete the course outlines. The principal may need to review the expectations with staff

and help staff understand why this change is being requested (e.g. transparent and equitable

assessment practices) and how they will be held accountable. It will be important for the change

agents to also monitor progress closely since progress is noted to only be made when it is monitored

(Hall & Hord, 2020). It is also recommended that small groupings be created at the staff meeting so

that administrators, members of the Assessment and Evaluation Committee and board resource staff can circulate and join table groups to help staff identify what barriers are getting in the way of having them complete the course outlines. In addition, since much of the work of change agents involves engaging with staff who have various personalities, it is recommended that all change agents engage in a personality inventory and/or an emotional intelligence inventory so that they can better understand the leadership behaviours that they are currently putting into practice and which ones may need development.

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Appendix A: Innovation Configuration

Dimensions	Ideal Implementation	In Progress	Not Yet in Progress
Development of Course Outlines	-Teacher develops course outlines *(using the common course outline template)* for their assigned courses that align with the 7 Fundamental Principles of Assessment from Growing Success and are consistent with other course sections.	-Course team teachers collaborate to reflect on current course outlines and revise them to have them align with the 7 Fundamental Principles of Assessment from Growing Success. -Course team teachers collaborate to revise their course outlines so that they are consistent.	-Students are verbally informed of what they will learn in the course. -No course outline is developed and shared with students and families.
Communication of the Course's Overarching Learning Goals (OLGs) and School Code of Conduct to Students and Families	-Teacher utilizes course outlines to clearly communicate to students and families at the beginning of the course, what the Overarching Learning Goals of the course are, how their student can aim to achieve them successfully, and what the school expectations are.	-At some point during the course, teachers share their personal course outlines (not consistent with other course sections) with students and families to communicate the goals of the course and what the school expectations are.	-Teacher verbally communicates the course's learning objectives to students. -Teacher verbally informs students of the School Code of Conduct and classroom expectations.
Reflects on Teaching Practice to Ensure Fair, Equitable, and Transparent Assessment Practices are in Place	-Teacher reflects on how the 7 Fundamental Principles are visible in their own teaching practice. -Teacher ensures that assessment practices are fair, equitable, transparent, and consistent with what was communicated to students and families on the course outlines.	-Teacher works collaboratively with colleagues and/or individually to reflect upon the 7 Fundamental Principles of Assessment, identifying areas of improvement. -Seeks feedback from students to learn and understand their experience regarding the assessment practices in the course. -Reflects on the feedback from students and families to improve assessment practices so that they are more fair, equitable, and transparent.	-Teacher Lacks awareness of the 7 Fundamental Principles of Assessment are. -Assessment criteria are unclear to students or families. -Inconsistent assessment practices are used and students do not have a full understanding of how they are being assessed.

Communicates Learning Outcomes to Students and Families	-Teacher provides students with ongoing descriptive feedback that is clear, specific, meaningful, and timely to support improved learning and achievement. -If students dispute a mark, the teacher discusses and agrees upon a mutually convenient time to meet and review the assessment and/or address the assessment concerns with the student and/or family. Admin may support, if necessary. -If students dispute a MIDTERM or FINAL reported mark, teachers: • direct students to the office to pick up a *Mark Challenge Request Form* • ensures that the student has access to their assessment feedback (including rubrics, checkbricks) • signs off on the form, acknowledging that they are aware that the mark will be challenged.	-Teachers are in the process of reflecting on their assessment practices and are mindfully revising their practices to provide more specific, ongoing, and timely feedback to students. -Teachers are reflecting on the factors and/or barriers that prevent students from meeting with them directly to discuss their assessments and/or marks. -As a result of teachers' transparency with their students, students are becoming more aware of how to respectfully approach teachers to request a meeting (regarding assessment concerns). -Due to consistent messaging from all staff, students are beginning to understand that they are to follow the formalized *Mark Challenge Request process* if disputing a MIDTERM or FINAL grade.	-Sometimes students are provided with specific feedback. -Feedback is not always provided to students in a timely manner which interferes with their ability to improve. -Challenges and/or barriers exist that prevent students and teachers from being able to discuss and/or review the assessment concerns of the student and family. -Confusion exists around how students approach teachers to discuss mark inquiries and/or how to dispute a final grade.

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Stages of Concern: Two Legged Interview Findings

Number of Teacher Participants the Stages of Concern

0 Unrelated/unconcerned	1
1 Informational	1
2 Personal	0
3 Management	8
4 Consequence	0
5 Collaboration	1
6 Refocusing	1

Participants (#) Identified at Specific Stages of Concern

- Consequence 16.7%
- 0 Unrelated/Unconcerned 8.3%
- 1 Informational 8.3%
- 3 Management 66.7%
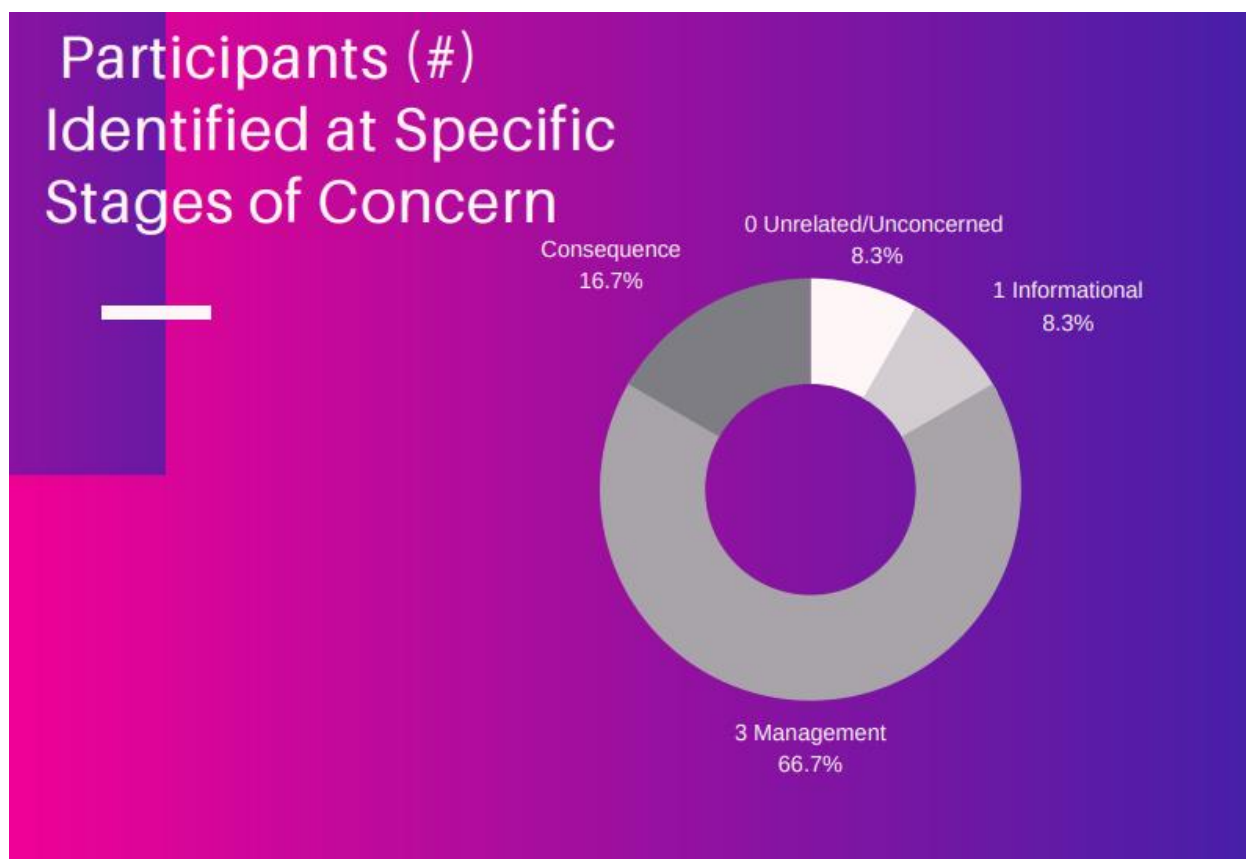
Appendix C
Levels of Use Findings

NO =
LoU I, II

Have your followers (e.g., department members) decided to ALL use the course outline and set a date to begin?

NO =
LoU 0, I

Change agents, (e.g., Department Heads) are you using the course outline template (change initiative)?

Are you currently looking for information or exemplars of course outlines to begin?

YES = LoU III, IVA, IVB, V, VI

What kind of changes are you making to your course outlines and/or to the development of course outlines with followers?

NO = LoU O

YES = LoU I

YES = LoU VI

NO = LoU V

NO = LoU IVB

Are common course teachers using the same course outlines and co-creating it together?

Levels of Use (LoU) of the Innovation

O ....Nonuse
I................Orientation
II................Preparation
III...............Mechanical Use
IVA............Routine Use
IVB............Refinement
V...............Integration
VI.............Renewal

Non Users

Users

Are you (if teaching a single section course) or your course team planning on making changes to the course outline?

NO = LoU IVB,

YES = LoU V, VI

30

Appendix D

Leadership Practices Inventory Findings

<table>
<tr><td colspan="3" align="center">*Leadership Practices Inventory* Findings</td></tr>
<tr><th>Core Practices of Transformational Leadership</th><th>Score</th><th>Rating Interpretation</th></tr>
<tr><td>Model the Way</td><td>9/10</td><td>Very frequently models the way</td></tr>
<tr><td>Inspire a Shared Vision</td><td>8.5/10</td><td>Usually very frequently inspires a shared vision</td></tr>
<tr><td>Challenge the Process</td><td>8.8/10</td><td>Usually to almost always challenges the process</td></tr>
<tr><td>Enable Others to Act</td><td>9.5/10</td><td>Very frequently to almost always enables others to act</td></tr>
<tr><td>Encourage the Heart</td><td>9/10</td><td>Very frequently to almost always encourages the heart</td></tr>
</table>

Appendix E
Change Agent Skills Questionnaire Findings

<table>
<tr><td colspan="3" align="center">*Change Agent Skills Questionnaire* **Findings**</td></tr>
<tr><td align="center">Categories</td><td align="center">Overall Score</td><td align="center">Interpretation</td></tr>
<tr>
<td>General Skills - Overall:
• Interpersonal ease
• Group functioning
• Training/doing workshops
• Master teacher
• Educational content
• Administrative/organizational ability</td>
<td>28/30</td>
<td>93% average score = between considerable to high rating of General Skills - Overall.

Areas of greatest strength include: interpersonal ease, group functioning, master teacher, and educational content.

Areas that scored considerable and have the most room for targeted development include: training/doing workshops and administrative/organizational ability.</td>
</tr>
<tr>
<td>Specific Skills - Interpersonal
• Trust/rapport-building
• Support
• Collaboration
• Confrontation
• Conflict mediation
• Confidence-building</td>
<td>26/30</td>
<td>86.7% = between considerable to high rating of Specific Skills - Interpersonal.

Areas of greatest strength include: trust/rapport-building, support and collaboration.

Area in most need of development is confrontation.

The areas that scored considerable and have room for development include: conflict mediation and confidence-building.</td>
</tr>
<tr>
<td>Specific Skills - Strategic
• Initiative taking
• Diagnosis - of individuals
• Diagnosis - of school organization
• Managing/facilitating
• Getting resources
• Demonstrating/modeling</td>
<td>27/30</td>
<td>90% = between considerable to high rating of Specific Skills - Strategic.

Areas of greatest strengths include: diagnosis- of individuals, diagnosis - of school organization, and managing/facilitating.

Areas that scored considerable and have the most room for development include: initiative taking, getting resources, and demonstrating/modeling.</td>
</tr>
</table>