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Sharing Leadership in Twinned Schools: Challenges, Opportunities and Implications

by

D. Scott Millar 

A thesis submitted to the Faculty of Graduate Studies and Research
in partial fulfillment of the requirements for the degree of
Master of Education

in

Educational Administration and Leadership

Department of Educational Policy Studies

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Date: August 28, 2001

Abstract

This study explores the challenges in school leadership brought about by "twinning" schools, an arrangement within which two schools are assigned to one principal. The study was guided by this research question: *How do principals and teachers in a small group of "twinned" schools experience leadership and administration?*

This descriptive case study used a qualitative methodology to gather and analyse data. Six principals participated in semi-structured interviews, and a focus group process. Six designated leaders were involved in semi-structured interviews.

There are three findings chapters. The first describes the initial decisions and challenges of the principals. The second details the growth experienced, and the third focuses on meaningful involvement of others.

A reflections chapter summarizes salient points from the findings. It describes strategies used by principals for effective leadership in restructured settings. A list of "Tenets for Principals" is offered as potentially applicable to a wide range of school settings.

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CHAPTER I

INTRODUCTION AND IDENTIFICATION OF THE RESEARCH PROBLEM

The Challenge to Innovate: Background to the Study

Education across the country faces the challenge of providing quality service in times of restraint. Resources for schooling have declined, while accountability and the expectation of higher performance standards have risen. "School boards, as many other organizations today, are, out of necessity, devising ways to reduce their expenditures" (Rees, 1996a). Edmonton Public Schools, certainly not immune to this phenomenon, presented a plan to their board to "examine an alternative that may focus more resources to the classroom" (EPS Board Report, 1999). Recognizing that in the current political environment no one wins when small community schools are closed, the superintendent identified and met with a number of principals to discuss a proposal to twin twelve of the schools in the district. "The project is designed to examine alternate ways of leading and supporting our schools" (EPS Board Report, 1999). The challenge was put succinctly: "The project relies on the willingness of principals, staff, students, and parents, to experiment with new designs, to suspend judgement, and to challenge traditional thoughts about schools" (EPS Board Report, 1999). The report goes on to indicate that a number of operational models may emerge; from one principal in charge of two schools with nothing else changing, to extensive change where a single campus with multiple sites emerges and a common infrastructure is shared.

As initial support to the Edmonton principals involved in this project, a summarized research review was provided. Telephone surveys of other large districts in Canada confirmed the uniqueness of the twinning approach to school organization. There was one similar occurrence recorded in each of Calgary, Vancouver, and Toronto. Common challenges identified, related to the issue of leadership, included managing the work load, effective communication, and the principal's role as manager. This telephone

survey also brought up the question of whether this approach actually did have potential for significant cost savings (EPS, Research Review, 1999).

A key message was part of the communication plan for the Twinning Project in Edmonton Public Schools: "Twinning allows for more efficient and effective use of staff and provides opportunities for staff collaboration" (EPS Board Report). This hypothesis provides a context within which the question and purpose of this study can be articulated.

Purpose

The purpose of this qualitative study is to identify and explore strategies used by principals in a twinned school setting to operationalize leadership roles and develop leadership capacity with, and among, staff. In each case of twinning, one principal was assigned to two schools. This twinning project presented an opportunity to study and explore the development of alternative leadership strategies. In this study, this is accomplished through the investigation of the following research question and the subsequent sub-questions:

Research Question: How do principals and teachers in a small group of "twinned" schools experience leadership and administration?

1. In what ways do principals experience change in their roles when they assume responsibility for "twinned" schools?
2. How does leadership unfold for teachers in a "twinned" school?
3. How do principals develop leadership capacity among the professional staff in the school?
4. What contribution do staff development opportunities make in addressing motivation, commitment, and involvement?

Within an environment of site based decision-making and the well referenced reduction of provincial funding levels, the challenge to find creative ways of economizing organizational structures has fallen to school districts. As an alternative to school closure, Edmonton Public Schools initiated a project in which twelve of their

schools were twinned. This study recorded and examined the emergence of new leadership roles and alternative models for involving staff in school improvement initiatives. Implementing changes involved input from all members of the school community - staff, students, and parents - in a dynamic setting where traditional roles had to be handled differently. Findings from this research have the potential to assist and support studies of leadership in the broader context, as discoveries specific to twinning may apply to other school organizational contexts. Leadership models identified here could provide impetus for, and assistance with, growth and development in leadership models appropriate in a variety of educational settings.

Current research supporting a revised look at the traditional role of leadership in schools provides an underpinning for the study. Developments in leadership theory provide a framework in which insights gained here can be applied in other district contexts. Results of this research provide information for staff and leadership development programs, training, and further organizational arrangements that call on alternative approaches to leadership.

Significance

This study examines and records the emergence of new and changing leadership roles and alternative methods for involving staff in school improvement initiatives. Twinning presents a dynamic setting where traditional roles are influenced by the need for change. The richness and depth of the descriptions provide the reader of the research with the opportunity to identify similarities to, and differences from, their own situation. The nature and characteristics of leadership models identified as a result of the twinning project may provide impetus and insight for growth and development in leadership, transferable to a variety of educational settings. This study provides concrete examples of effective strategies that involve the school community (e.g., staff, students, and parents) in school improvement where student achievement is a primary goal. The specific focus

provided by the sub-questions establish a comprehensive framework to ensure that leadership strategies are described and evaluated within a context that reflects the complexity, multiple criteria, and demanding work environment that schools present. Continued exploration of restructured school organizations is inevitable.

The principals of twinned schools experienced many challenges. A range of responses to this initiative from all stakeholders was predicted and was related to their support for the organizational change this represented. Varying degrees of resistance arose from staff and parents, possibly resulting from a lack of understanding. However, the opportunity for discovery and insights into new approaches to leadership is rich with potential. Principals and staff of the twinned schools were encouraged by the superintendent to experiment with new designs, suspend judgement, and challenge traditional thoughts about school. Hence, there was a climate of risk-taking and exploration, suggesting that the potential for quality research involving the school community was strong. The goals for the twinning project, as set by the district, were very specific and dealt primarily with cost issues relative to utilization of resources and provision of sound educational opportunities. The research, delves specifically into leadership and the ways it responds to the organizational changes. This study and its findings provide principals and leadership staff, both within the project and beyond, with an extended understanding of theory-based variables in decision-making that can influence behavior and effectiveness.

This research contributes to the growing understanding of the many factors that influence the principals' role and the way it is operationalized. The findings contribute to an increased awareness of the value of shared leadership in schools; building those skills in others while increasing participation in meaningful acts of leading. It is hoped that readers of this research will be able to implement the recommendations and find them relevant to their setting. There is important potential in accepting the invitation for

further research into the complex and dynamic phenomenon of school leadership. Suggestions are provided.

Definitions

1. Leadership Capacity – shared leadership opportunities with professional staff, in a site based environment, to establish programs and initiatives that provide a meaningful process for involvement and commitment to school improvement and growth in student achievement (Lambert 1995, 1997, 1999).
2. Effective management–ensuring the often mundane, but required, interaction in schools regarding operational issues, finance, and daily information that occur predictably, according to an organized schedule
3. Staff development opportunities –the formal and informal opportunities staff use to work together and pursue means of achieving common school goals
4. Site based decision-making – an organizational structure that "focuses on decisions being made closest to where programming is provided for students, at the school level. This improves the effectiveness and efficiency of decisions and enables schools to develop their own unique character in response to student and parent needs and interests" (EPS, 1999).

An Initial Perspective

School leadership is complex and challenging. The principal, as the central leadership figure in the school, is responsible for, and has impact on, the tone and quality of all that happens in a school. A common adage states "how goes the principal, so goes the school." The principal is instrumental in creating and carrying out the vision of the school and needs to maximize input from, and involvement of, the larger school community.

Organization of the Thesis

The balance of this thesis is organized in six chapters. Chapter 2 presents the method of research. It describes the participants and the method used to gather and analyse the data. Chapter 3 provides a review of the literature on twinning and highlights current leadership theory in schools. This chapter provides foundation and background about the challenges and opportunities to which quality leadership responds. Chapters 4, 5, and 6 present the findings and analysis of the interview and focus group data. These chapters are organized in a progression and reflect the complexities and challenges in leading a twinned school. The story told is non-linear, topics and themes inter-relate; again commenting on the complexity of a responsive leadership process. The thesis concludes with a reflections and recommendations chapter. It summarizes salient points from the findings and provides a set of guidelines for effective leadership as it played out in the twinned schools. Some recommendations are provided in a broader context of school leadership.

CHAPTER II

METHOD

The research conducted for this study is interpretive and descriptive. It presents a multiple case study that details rich descriptions of the leadership experience in the six twinned schools participating in the study. The elements discussed in this section are: (a) purpose, (b) participants in the study, (c) consent and confidentiality, (d) pilot study, (e) data collection, (f) data analysis, and (g) trustworthiness and limitations.

Purpose

The purpose of this qualitative study is to identify and explore strategies used by principals in a twinned setting in a large urban school district to establish leadership capacity with and among staff. The principalship is the focal leadership role considered. The research endeavors to identify a framework of strategies that provide insight into the concerns and needs of the principals in their unique site-based decision-making environment, as well as to gain understandings about leadership challenges, opportunities, and implications involved in twinned schools.

Participants in the Study

The main participants in this study were the group of principals assigned to the twinned schools. Though, available schools and individuals were pre-determined. purposeful sampling strategies was present in the method when considering the range of experience and career history the principals represented. Twelve district schools were involved; six "twinned" principals represented the accessible participant group from which to draw. They all met the central criterion of being part of the school district twinning project, and all agreed to participate. Although they were all male, they varied considerably in experience and in leadership style. Please see table 4.1 and the discussion in Chapter 4 at leadership styles for move information. In addition to the principals, a secondary group of participants; the "designated leaders," (formally

designated leaders from the professional staff of each school) were involved. Each principal was asked to identify a potential candidate to participate as a member of this group.

Consent and Confidentiality

Information about the intent of the research was shared with the participants through an initial telephone contact. As follow-up, the purpose and nature of the research was shared in writing. A letter of introduction that incorporated a consent form was sent to each participant. These are included as Appendix A and B. The consent forms were collected and retained at the prearranged interview time.

In all initial communication with prospective participants, the optional nature of involvement was clarified. Their right to opt out would be immediately recognized without prejudice if they chose, at any point, to withdraw from the described research. This was stated in the letter they received after the initial contact, and reinforced verbally. The text of the research report was completed in a manner that protected individual identities. The audio recordings of all interviews were properly secured during research. Identities were coded for identification; neither the name of the participant nor the name of the school were used during the interview. Upon completion of the research, these tapes were erased. Transcripts will not be released to any other party and will be available only to the researcher, the participants, and the supervising faculty member.

Pilot Study

The research method used in this pilot study corresponds to the design used in the main study. This section provides description and discussion of the following components of the pilot study: (a) purpose, (b) participants in the pilot study, (c) data collection, (d) data analysis, and (e) significant findings from the pilot study.

Purpose

The purpose of the pilot study was to identify and explore strategies used by principals in a twinned setting to establish leadership capacity with and among staff. An important aspect of this pilot study was to develop an effective interview guide for use in the main study. In order to provide a thick description of the strategies and leadership approaches implemented in this restructured environment for schooling, a descriptive, qualitative pilot study was designed. As perceptions and experiences are central to this examination, information was accessed through the case study method using a semi-structured interview. Substance emerged as the participant's responses were allowed to guide the content. Probing questions also helped develop the content.

One interview was conducted in each of a phase one and phase two pilot design. As part of the first phase, the format and specific interview questions were evaluated and revised in a manner to better relate the research questions to the "twinning" project and its objectives. The second phase of the pilot study was based on the revised interview guide.

Participants in the Pilot Study

There were two participants selected for the pilot study, one for each phase. The initial interview was conducted with a principal colleague, currently assigned to a "special projects" central administrative position. The "twinning" project was part of her portfolio of responsibilities. She acted as the support and contact person for, the liaison between, the schools and the central office. She had an informed perspective on the six schools in the main study and offered valuable insight into developments that had occurred over the first half of the year. The second participant was one of the six twinned principals.

Data Collection

For the pilot study, data were collected in two phases using a semi-structured interview conducted in the work environment of the two participants. The interview guide tested in the pilot and used in the main study is included as Appendix C. The interview guide facilitated consistency. Each response was probed to ensure clarification and to encourage reflection. The revisions to the Interview Guide helped streamline responses so that they would focus more directly on the intent of the main research question. Member checks were initiated as part of the pilot by sharing summaries with the respondents to confirm the perceptions of the researcher.

Data Analysis

The data were analysed using a combined inductive and deductive approach, coding frames were developed from manifest content contained in the transcript, and latent content was developed through links to the literature and personal perceptions of the researcher (Berg, 1998). In summary, a reflective analysis approach was used.

The data were open-coded for emerging themes and personal judgment, and insights gained throughout the process were applied to the analysis. Themes and strategies were refined and grouped in categories that emerged. Findings were examined in-depth according to the categories established. A descriptive analysis about decisions and discoveries made by the pilot participant was developed.

The data from this interview were coded thematically through a careful process of analysis. Initial open coding was done using the four sub-questions presented earlier as coding frames. Themes were allowed to emerge and were recorded as part of this initial coding. During this process, researcher comments and reflections were recorded, and the coded data were further examined by the researcher for latent content and emerging themes. These themes were then organized and linked to the themes evident in the literature. The analysis of the phase one interview, which refined the focus of subsequent

interviews, was also considered as the themes were categorized. By comparing these interacting frameworks, with influence from the researcher's perceptions, a revised set of coding frames emerged; categories and criteria for selection were charted (Appendix D). This set of categories provided a starting point for coding initiated in the main study.

Significant Findings from the Pilot Study

This pilot study was instructive on a number of levels. The emerging coding frames revealed an alignment with the literature, as well as an organizational starting point for further analysis in the main study. The fact that consistencies to the literature were evident in the pilot showed promise that the additional data from the main study would enrich the study and strengthen its implications. The pilot confirmed the appropriateness of involving a secondary set of respondents who were not principals. This helped provide a related, but different, perspective; the perceptions and experiences of non-principal staff members influenced by the project in regards to the leadership of the principal.

The phase 1 interview, with the central liaison, informed and enhanced the phase 2 interview with the principal in the field. The questions changed, but many of the perceptions gathered in phase 1 were extended and illustrated by the principal participant in phase 2. This reaffirmed the effectiveness of the research method. Through reflective thought during the analysis of data for this pilot, questions appropriate for the interview with designated leaders (the secondary participant group of the main study) emerged (See Appendix E).

The organization of coding frames (Appendix D) continued to evolve as data from subsequent interviews in the main study were analyzed. The categories were very interrelated and changing conditions altered their status and influence. New and revised organizations continued to emerge.

The pilot study process provided excellent exposure to the process of data collection and analysis. Through the analysis process, I was able to identify instances where I missed opportunities to probe for deeper understanding. Skill development in this regard is on-going and must be attended to with diligence. Research notes taken immediately after interviews were found to be helpful in clarifying and recalling perceptions that assisted in confirming emerging coding frames.

The analysis process was very complex. The volume of data resulting from the main study would be extensive, dynamic and evolving throughout the process. Strategies for careful organization, sorting, and recording, were required. The ATLAS/ti © software package was adopted to this end.

A calculated timeline was applied to ensure that the data collection from the twinned schools I had been assigned to as principal was completed prior to starting this new role. During analysis processes, attention to the data and use of the framing codes assisted in maintaining objectivity.

Process of Data Collection

Data for this qualitative study were gathered in three phases for the main study, each one designed to build on and inform the next. Hour long, in-depth interviews were conducted. Interview guides particular to the three phases are included as Appendix C, E, and F. The first phase was the principal interviews conducted during February and early March, 2000. A sample portion of the transcript is included in Appendix G. The second phase of data collection was the interviews with six "designated leaders," one from each set of twinned schools. These interviews were conducted during March and early April. The final and third phase of data collection was a focus group involving the six principals together in mid-May. This session represented a year end point for the first year of the twinning project.

The semi-structured interviews were designed to gather enriched and in-depth responses. An interview guide provided for consistency. Probes were used for each response, as appropriate, to enrich the individual response and reflection. As in the pilot study, a member check was used to confirm the perceptions of the researcher, as transcripts of the data collected from each participant were checked for accuracy and correctness. Data from the interviews conducted in this initial phase were used to develop questions for the interview guide used with the designated leaders in phase two. Data from both phase 1 and 2 interviews were applied to the development of a guide for a focus group interview (phase 3) with the six principals (Appendix F).

A focus group strives for a "synergetic group effect" and can be characterized as "collective brainstorming" – the assumption is that interaction stimulates discussion, as the participants listen to each other's experiences and react to each other's comments (Berg, 1998). My objective in using a focus group as an open-ended approach to data collection was to take advantage of the opportunity of involving the informants in a process where they were encouraged to "feed off" each other to stimulate a truthful and free-flowing discussion. This dynamic process led to rich details and the identification of common themes, shared strategies, and perceptions. The central project liaison from the pilot study served as facilitator and moderator. A training session with this person allowed me to provide clarifying directions for the process. This included reviewing of potential probes, strategies for managing a balanced involvement for each participant, and a review of the emerging themes from findings as well as the literature. This freed me to observe and take anecdotal notes in order to confirm and elaborate on the responses. The resulting data from this process was also shared with the participants as a means of checking for perceptual differences.

The process of data collection, described above, in its three phases, represented both mid-year and year-end points in the first year of the twinning project. It involved

the six principals as primary leaders in the twinned settings and six additional school leaders closely involved in the project. Bringing the principals together for the focus group experience contributed to the consistencies evident in the data and broadened the content gathered during the interviews. Saturation points were noted as re-occurring comments and responses surfaced during this third phase of data collection.

Data Analysis

The data were analysed using a primarily reflective analysis approach. The data were coded inductively and deductively. Emerging themes, personal judgments, and insight gained throughout the process were applied to the analysis. Codes were refined and grouped in categories as they developed. Findings were examined in-depth according to the categories established.

Atlas/ti ©

The Atlas/ti © Qualitative Research Software package was employed for the analysis, sorting, and reducing of the data. As a result of this application, terminology and organizational features of the software were incorporated into the data analysis stages of the research. This section provides some explanation and illustration of these influences. The decision to use the software was a result of the pilot study, where the value in handling the significant amount of data in an organized, accessible way was recognized.

The data were organized into three "hermeneutic unit," corresponding to the three phases of the data collection: (a) principal interview transcripts, (b) designated leader transcripts, and (c) the focus group transcripts. Each transcript was referenced as a "primary document," associated with its particular hermeneutic unit. The Altas/ti Short Manual (1998) defines hermeneutic unit as:

> Everything that is of relevance to one project [and] is treated as one entity, ... the primary documents, as well as the quotations of these documents, the codes, the developing concepts, the linkages

between the concepts, the families, the networks, memos are all part of one hermeneutic unit. (p. 8)

Table 2.1 shows the data organization for this study according to this structure

Table 2.1 Description of the Data in Hermeneutic Units

		Hermeneutic Unit	Number of Primary Documents	Description
Name (W/ abbreviation)	1.	Thesis Leadership (TL)	5	• Principal interview transcripts
	2.	Secondary Interviews (SEC)	6	• Designated leader interview transcripts
	3.	Focus Group (FG)	2	• Focus group interview transcripts

All the coding of data was accomplished with Atlas/ti. Codes are defined to "capture some meaning from the data, they are used as ... classification devices to create sets of related information pieces for the purposes of comparison" (p.11). A sample code list from one of the hermeneutic units is included as Appendix H for reference. The codes were further organized into "families" as a way of "clustering" common themes. Throughout the process of coding, anecdotal notes were easily added and retrieved. My reflections and ideas could be recorded and attached using memos and comments that remained attached to the code, and the quoted text, making retrieval easy.

A variety of reports, available with this software, were used to assist in the analysis and reporting stages of the research. For example, printing all quotes for a given code allowed the viewing of related data to facilitate further analysis. Additionally, a "document table" could be generated to examine the frequency of codes used in each primary document in the hermeneutic unit. A sample is provided in Appendix I.

Atlas/ti offers "mechanical tools" to allow the researcher to process and represent interpretations efficiently. One is able to search the text for key words and also use a "query tool" to match codes and narrow down specific references according to the criteria

established. The "network view" for reports served as an overview of data organization decisions during the analysis process. Appendix J and Appendix K are sample of "code families" shown in network view. This view shows a "cluster" of related codes complete with the anecdotal notes recorded during coding.

I did not use Atlas/ti to its fullest potential; I did significant sorting of the data manually in paper form. My objective of maintaining organization and achieving efficient retrieval was met. During the writing process I was able to "freeze" the data and easily reference useful reports that contributed to the development of the story told in this study.

This experience with a qualitative data package was positive. There is potential for its expanded use in research of this type.

Trustworthiness and Limitations

Given the nature of this interpretive study, there is no effort to generalize across all school leadership situations. However, the richness and depth of the descriptions will provide readers with the opportunity to identify similarities to, and differences from, their own situation. A high level of applicability is the goal. The research informs the field by describing innovative approaches to leadership in schools. It is my contention – one which is confirmed in the literature –that principals, in general, have a common set of constraints and constructs with which to deal as leaders. Limited resources, site-based decision-making, and growing accountability to the public are examples. The richness and accuracy of the story it tells largely determine the significance of this study. Innovative ways of approaching and sharing leadership in schools are presented.

I accept the limitation of the volunteer participant group in this study. Their committed availability and common challenge provided a rich dynamic from which to draw data. I also present my bias directly. As an experienced principal, I have skills, beliefs, and ideas about the operation of a school that may have effected my

interpretations. I have endeavored to overcome the urge to influence the data collection and analysis processes with my biases. The member checks built into the design, as well as the focus group and data analysis methodologies used, were deliberately designed and adhered to, to minimize the effect of those influences.

Chapter III

A REVIEW OF THE LITERATURE

A PROGRESSION IN LEADERSHIP THEORY

This chapter provides an overview of the literature related to the "twinning" of schools. It begins with an examination of examples of "twinning" elsewhere in Canada and then extends to themes related to the challenges of redefining leadership roles in schools experiencing change and restructured settings. The intention is to study the role of the principal, as it represents the central leadership role in schools. In support of the theory that the situation is an important determiner of the way leadership plays out, this review begins with the examination of the Ontario experience where "twinning" has been initiated over the last number of years. Subsequently, through this example, an opportunity to compare and contrast the "Twinning Project" in Edmonton with theory is provided.

Following the example of documented experiences with "twinning," a review of related literature on classical conceptualizations of leadership is presented. A description of a specific initiative to redefine the role of the principal then provides an introduction to more recent literature on leadership that links leading with learning and expands the mantle of leadership in schools to include the significant and purposeful involvement of others.

The change inherent in the restructuring that twinning presents provides a catalyst to explore the concept of shared leadership and related innovations in an expanding body of literature on leadership particular to the educational environment. Opportunities for redesigning roles and relationships within the school environment are presented.

The Ontario Experience

The available literature on "twinning" is narrow, but thorough, and provides clarity by presenting a key definition that will assist in identifying important factors for consideration in the Edmonton context of twinning. The specifics of "twinning" that define the organizational situation are related to school district culture, environment, and fiscal conditions. Rees (1996b), in her review of the literature, confirmed that little information was available on the topic of "twinning" in the Canadian context, but did find related information of American origin. The Americans use the term "clustering," and she uses the two terms interchangeably in her writing. "Schools engaged in some sort of sharing arrangement are termed c*lustered or twinned*" (Rees, 1996a, p. 5). She draws parallels and provides the following definition: "Clustering (twinning) is defined as a joint commitment to sharing resources for mutual benefit – and in particular, to promote school improvement" (Berliner, cited in Rees, 1996a, p. 5).

In the Ontario case, collaboration was seen as an important component of the sharing that went on between "twinned" schools Rees studied. This "collaboration can occur in different ways, sharing staff, sharing materials and equipment, sharing facilities, sharing professional development activities, ... the sharing of educational programs" (Rees, 1996a, p. 6). Her review of the literature identified advantages and disadvantages of twinning, grouping them according to "educational, economic, social, and political benefits" (Rees, 1996a, p. 6). The educational benefits included a better quality of programs, increased use of specialists, regular sharing of expertise resulting in a reinvigorated teaching staff, and having a wider range of available resources. Economic benefits were reduced salary and support service expenditures. Social benefits encompassed the expanded field of contact for both staff and students and identification with a larger community of learners. The political benefit was the long term viability of the twinning arrangement where equity leads to "a climate of cooperation and mutual

benefit rather than competition and control" (p. 7). A number of potential disadvantages identified in the literature included lack of common purpose, decreased level of commitment, communication difficulties, ineffective leadership, and obstacles to cooperative working relationships. Rees concluded that there is strong evidence to support on-going exploration of this concept, even though the goals of improved efficiency and effectiveness have not been completely realized.

In subsequent articles (Rees, 1996a, 1996c, 1997), her research is expanded to include the views and thoughts of both central administrators and school principals involved. There were similarities in the findings, but it was the principals who provided practical suggestions for advancing the concept. "From the principal's perspective, the main benefits of twinning have been more staff collegiality and sharing of resources of all types" (Rees, 1996c, p. 15). To determine support for on-going exploration and elicit suggestions for growth in the concept, a process of evaluation and monitoring was conducted after the first year and involved all stakeholders. Principals, staffs, and communities seemed to be less inclined to question and more willing to accept success than initially was the case; the experience of "doing" allowed for concrete suggestions for on-going improvement. This confirms the important notion that commitment to alternative organizations and collaborative leadership models emerges and strengthens over time, when aided by positive experiences. Rees proposed this revised definition: "Twinning is a process that moves towards total resource sharing between two schools, regardless of their size, location or composition" (Rees, 1997, p. 16). This definition illustrates that alternative leadership models develop to help the organizational change emerge and that, with experience and commitment, perimeters potentially expand over time. Characterizing "twinning" as a process also supports the concept of growth and evolution.

A recent paper presented on the Ontario experience (Rees, 2000) shares data on the current growth and expansion of the twinning practice in that province. Between the years 1994 and 1999, instances of twinning (schools sharing a principal) increased from 97 sets in 1994 to 149 sets in 1999 (p. 3). Rees (2000) identifies the importance of a planning and preparation stage that involved a carefully constructed communication plan for all stakeholders, yet concludes "that preparation for twinning in Ontario has been minimal" (p. 4). Similarly in the twinning project, principals assigned to twinned schools were given little by way of orientation, nor was any plan for documenting changes instituted.

Citing the American research by Ornstien, who recommended 20 questions be addressed in preparation for twinning, Rees focused on one of these questions as central to the situation in Ontario: "4. Will students, parents, teachers and community residents gain from the change? How"? (p. 5). She explains this narrowing of focus highlighting the importance of purpose:

> Educational administrators are not restructuring just to make changes; there must be some purpose for the change as strategy precedes structure and not visa versa. The change, putting students first, is not the cost of their education but the desire, hopefully, to improve the educational program. (p. 6)

Rees draws attention to the need for time for all involved to find ways to participate effectively.

> Time facilitates the necessary interaction and the establishment of trust relationship among participants, to begin thinking in a cooperative way, to evolve a common agenda, to develop and implement programs that serve the needs of the participating schools, and to assess their impact. Moreover time is also needed to develop trust relationships among local school personnel and outsiders. (p. 6)

Brackenbury et al. (1990), cited by Rees (2000), identifies three phases in the evolution of a school involved in a twinning relationship. The first phase is "initiation,"

where a critical action is to "articulate a common purpose" (p. 7). Their research suggests that structures be kept as simple as possible and effective communication links between twinned schools be established. During this period the focus is placed on advantages "gained from cooperation and the pooling of funds" (p. 7). Leadership and support of district, school and community are noted as important components to ensure positive initiatives during this initial time of change.

"Consolidation" characterizes the next phase, where the strategic focus is on highlighting and ensuring successes. "Twinned" schools in this phase benefit from planning "a joint activity (such as a joint curriculum endeavor or a sports day) – something that is guaranteed a high degree of success for all parties" (p. 7). Regular communication, trust, and relationship building are deemed essential to this phase "to allow for the generation of ideas that can be addressed by and within the cluster" (Brakenbury et al., 1990).

The third phase, corresponding to the third year of operation, focuses on "evaluation." This "re-orientation" phase is designed to examine the program with an eye to re-invest and make recommendations related to the costs, challenges, and successes of these shared activities.

Rees (2000) proposes a number of recommendations based on Brackenbury et al.'s three phase framework. Highlights of these include: well informed inventories of expertise, appropriate resources and physical assets, carefully articulated purpose, cost analysis, visible district support, accommodation for infrastructure and start up costs, school matches that make sense (related to size, levels and need), and careful selection of the principal. The establishment of a monitoring committee to deal with the change process, accomplishments, record keeping, public relations and articulation of the benefits to student learning is also recommended, and reinforces the importance of purposefully involving stakeholders in ongoing evaluation. All of these

recommendations are in the context of an over-all recommendation for careful planning and preparation as part of an implementation plan for a "twinning" initiative.

Classical Conceptualizations of Leadership

As a means of focusing the investigation for this study on the leadership experiences of principals and teachers in a twinned school setting, it is important to articulate the often interrelated theoretical perspectives that are part of the extensive body of literature related to administration, management, and leadership.

A Useful Distinction: Management and Leadership

Cunningham and Cordeiro (2000) make a clear distinction related to the leadership function in schools. They state that "administration is the broadest term related to organizational responsibility, management focuses on efficient use of resources, and leadership focuses on organizational direction and purpose" (p. 153).

Sergiovanni (1995) also argues that management and leadership are interrelated aspects of administrative responsibility in the school organization. He points out that a person's orientation and experience "determine what principals believe about management and leadership and how they practice as a result" (1995, p. 57). Sergiovanni goes on to claim that successful principals must be strong managers and effective leaders. He notes that "Management is concerned with doing things right, ... leadership is concerned with doing right things" (p. 40). Hanson (1996), in discussing leadership roles, notes the importance of "strategic vision about the direction the organization should go and the leader's noncoercive skill at drawing subordinates into the active pursuit of the strategic view" (p. 155). The manager, on the other hand, concentrates on the "nuts and bolts of making the organization work, such as hiring, evaluating, distributing resources, and enforcing rules" (p. 155).

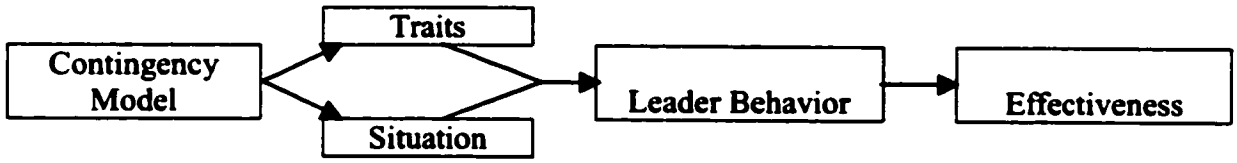
Hanson (1996), in reflecting on this distinction, quotes Mintzberg stating "It is in the leader role that managerial power most clearly manifests itself. Formal authority

vests the manager with great potential power; leadership activity determines how much of it will be realized" (p.155). Strengths in both areas, or both ends of this continuum, are important in effective school leadership. They rely upon each other.

The Instructive Utility of Contingency

A fundamental hypothesis, put forward in the literature related to leadership theory and its continuing development, postulates that "Leadership effectiveness depends on the fit between the characteristics and behavior of the leader and situational variables" (Hoy & Miskel, 1996, p. 381). This description of the contingency theory of leadership, developed largely through Fiedler's research, "demonstrates that a combination of situational and individual characteristics partly explains the leadership phenomenon" (p. 392). With the stated goal of understanding the nature of work involved in leading organizations, Hoy and Miskel provide a schema (Figure 3.1) that presents the important contributing elements.

Figure 3.1 Contingency Model and Contributing Elements



(adapted from Hoy and Miskel)

Figure 3.1 helps explain, in part, why the definition of leadership " remains illusive and controversial" (Hoy & Miskel, 1996, p. 374). "It not only depends on position, behavior, and personal characteristics of the leader but also on the character of the situation" (p. 374). Contingency theory stresses the variability of behaviors in relation to environmental needs. Standard operating procedures are not always appropriate in the face of all the wide-ranging types of demands a school leader is certain to face. "Contingency approaches specify the conditions or situational variables that moderate the relationship between leader traits, behaviors and performance criteria" (p. 376). This variability and importance of situation in influencing the actions of the

principal is specifically applicable to the variety of twinning arrangements involved in this study.

Striving to Refine

Sergiovanni (1999) applied the notions of *lifeworld* and *systemworld*, to thinking about school leadership. In doing so, he drew from the work of German philosopher, Jürgen Habermas, who uses the terms "to describe two mutually exclusive, yet ideally interdependent domains of all society's enterprises from the family to the complex organization" (p. 5). Applying these two terms to the school environment, and recognising their place and interrelated value, provides a useful clarification. "Culture, meaning, and significance are parts of the lifeworld of the school. ... The systemworld is a world of instrumentalities usually experienced in schools as management systems. ... When things are working the way they should in a school, the lifeworld and systemworld engage each other in a symbiotic relationship" (p. 4).

Sergiovanni (1999) noted that the behaviors and actions of leaders affect the balance between the lifeworld and systemworld.

> Either the lifeworld determines what the systemworld will be like or the systemworld will determine what the lifeworld will be like. Either management systems are uniquely designed to embody and achieve the purposes, values, and beliefs of parents, teachers and students in a particular school or the purposes, values, and beliefs of parents, teachers and students will be determined by the chosen management systems. (p. 7).

In this latter instance, the systemworld, with its management structures, becomes separated from the lifeworld. The systems "become ends in themselves" (Sergiovanni, 1999, p. 8) and, citing Habermas, the imbalance presents the beginnings of "colonization of the lifeworld." This "colonization occurs when the systemworld begins to dominate the lifeworld" (p. 8).

People and Relationships: Developments in Leadership Theory

Notions of transactional and transformational leadership add another dimension to thinking about leadership. Transactional leadership is about bartering between leader and follower (subordinate orientation), where they "exchange needs and services in order to accomplish independent objectives" (Sergiovanni, 1995, p. 118). In contrast, with transformational (transformative) leadership, "leaders and followers are united in pursuit of higher level goals that are common to both. Both want to become the best. Both want to shape the school in a new direction ... purposes that might have started out separate become fused" (p. 119). Hoy and Miskel (1996), in citing the research of Kuhnert and Lewis (1987), support this notion and state that "the basis of transformational leadership is in the personal values and beliefs of leaders. By expressing their personal standards, transformational leaders are able to both unite followers and change their goals and beliefs in ways that produce higher levels of performance than previously thought possible" (p. 393). Hanson (1996) captures the thoughts of Sergiovanni in describing transformational leadership in the form of "leadership as building, ... the focus is on arousing human potential, satisfying higher needs, and raising expectations of both followers and leaders to motivate them to higher levels of commitment and performance" (p.181). Sergiovanni (1995), in his presentation of a developmental view of leadership, describes four specific strategies that apply to work and relationships with teachers and others in schools. They span the contrasting characterizations of transactional to transformational leadership approaches, hence the developmental description. In brief, these broad-based strategies can be described as follows:

Table 3.1 Leadership Characteristics – Transactional to Transformational

Bartering:	trading wants and needs for cooperation and compliance
Building:	providing the conditions that enable teachers to experience psychological fulfillment; shifting from extrinsic to intrinsic rewards
Bonding:	emphasis on relationships characterized by mutual caring and the interdependence that comes from mutually held obligations and commitments
Binding:	developing common commitments and conceptions about purposes, teaching and learning, and the relationships that bring people together as a community of mind; people become self-managing.

(summarized from Sergiovanni, 1995, p. 113)

Sergiovanni (1995) calls for the development of a revised principalship theory that is "more responsive to nonlinear conditions and loose structuring and that can inspire extraordinary commitment and performance" (p. 45). In striving for this outcome, leaders must combine management skills with leadership skills and be involved in ongoing reflection and decision-making that will lead to the "right things" happening as part of ongoing growth and improvement. A "leader must be a developer of people and a builder of teams" (Hoy & Miskel, 1996, p. 395, citing Bass, 1990). A successful school works as a "team" with a focus and a purpose.

To achieve this requires commitment and the process to build, celebrate, and strengthen it. "Sustained commitment and performance require an approach to leadership that connects people to work for moral reasons" (Sergiovanni, 1995, p. 115). Kroeker (1996), in her article on the nature of moral leadership, reinforces an important implication for transformative, people-oriented leadership. "Making moral decisions means making decisions of some higher order – not based on what we feel like doing but what we feel is the *right* thing to do, and that it is somehow very important to do so" (p. 18). When the focus is on relationship building and achieving commitment and

extraordinary performance, a number of variables come together, often in conflict and with degrees of ambiguity. "We have potential for conflict among the value systems of different individuals brought together in one organization, as well as between the value system of individuals and the organization" (Kreoker, 1996, p. 18). Quoting from Day (2000), "At the end of the day, the head [principal] has to have integrity and stick to core values and beliefs. It is important ... [to] demonstrate integrity in the face of diversity" (p. 58). In considering the skill set required for this level of leadership, Day goes on to say that "no neat solutions exist to situations that hold so many variables; individual and collective value systems rather than instrumental, bureaucratic concerns define and drive successful leaders" (p. 58). This suggests that the culture of the organization or school is an important consideration in this examination of leadership. The following section of this review develops this theme.

Finding Culture in Community: Changing the Metaphor for Schooling

The intent of this section of the review is to begin moving beyond the traditional orientation of schools and leadership. Responsiveness to the changes introduced by the "twinned" environments, described and analysed in this study, requires insight into the complex, changing demands of leadership, the importance of the people involved in the organization, and the potential for redefining roles. Sergiovanni (1995) advocates for a change in the metaphors used to bring renewed meaning to management, leadership and schooling. "Subsuming *instructional delivery system* as a tactical option under the more encompassing and strategic *learning community* is an important beginning" (p. 60). Accepting the community metaphor for schools allows cultural and symbolic forces to emerge, guide leadership action, and build commitment. "Seeking to define, strengthen, and articulate those enduring values, beliefs, and cultural strands that give the school its unique identity over time" (p. 88) becomes a primary and central concern. This emerging culture is an important element of the lifeworld of a school; it articulates the connecting

needs of people. Fullan and Hargreaves (1991), as they begin an examination of the type of culture necessary to provide support for teacher growth and school improvement, define culture as "the guiding beliefs and expectations evident in the way a school operates, particularly in reference to how people relate to each other. In simple terms, culture is the way we do things and relate to each other around here" (p. 37).

Drawing further on the work of Habermas, Sergiovanni (1999) describes the essence of lifeworld:

> *Culture* provides us with the knowledge, beliefs, and norms systems from which we derive significance. *Community* lets us know that we are connected to others and are part of a social group that is valuable, and thus we ourselves are valuable. ... *Person* refers to the individual competencies we develop that lead us to reach an understanding of our personal lifeworlds and that helps us in our search for individual identity, meaning, and significance. (p. 14)

"As schools become communities they are less driven by bureaucratic characteristics such as hierarchies, mandates, and rules and by personalities and interpersonal skills of their leaders. Instead school's values and purposes become the driving force" (p. 24). People and ideas are important; a learning community allows and encourages the connecting of people and their ideas. Common purpose that is articulated, and accepted becomes the glue that binds. Meaningful involvement of parents, students, and teachers is facilitated and encouraged. Together, disorientation and isolation are minimized through a growth in identity and acceptance. A building sense of community helps people talk about commitment and maximized involvement in regards to things that matter deeply, "communities are organized around relationships and ideas ... connections are based on commitments, not trades" (p. 65). Sergiovanni makes a valuable distinction, providing insight into the characterization of relationships that emerge in learning communities to make them unique. Connections are based on "covenants" instead of "contracts." "Social contracts involve a deal. Each of the parties to the contract gives up

something to the other party to get something back" (p. 60). This applies to all stakeholders in a school. Parents, teachers and even students expect "incentives in exchange for compliance" (p. 61). Contractual arrangements in schools require rules, regulations, and policies to guide the behavior and there would be consequences for noncompliance. Connections based on covenants are moral in nature; "connections are created when they are together connected to shared ideas and values" (p. 61). In a learning community, everyone accepts these common values and has a personal, as well as a social, relationship with them. When they are well established, the lifeworld is the central and driving force.

Elaborating on the Community Metaphor

Authors such as O'Neil, 1995; Fullan, 1997; DuFour and Eaker, 1998; and Senge, 1990, in writing about "learning organizations," direct attention to attitudes and approaches used when working with teachers as leaders, while adopting a systems approach to defining the school or organization. "Systems thinking is a discipline for seeing the whole" (Senge, 1990, p. 68). "It is a framework for seeing interrelationships rather than things, for seeing patterns of change rather than static snapshots" (p. 68). Senge is very careful and clear in providing a definition for learning organization: "an organization that is continually expanding its capacity to create its future" (p. 14). It must incorporate the concept of generative learning as significantly distinct from adaptive learning that is linked to survival, void of growth.

Substitutes for Leadership

Learning communities and organizations, are characterized by meaningful involvement of professionals in acts of leading. "What is true changes as we change our metaphor for schooling" (Sergiovanni, 1992, p. 46). Sergiovanni presents the case that when schooling is looked at as a learning community rather than purely as an instructional delivery system, teachers' roles change as a result of a commitment to a

common purpose. This creates important implications for staff development around community building initiatives. Common purpose leads to accepting responsibility for the entire domain rather than the sectioned off classroom. This places learning and the child at the center of activity and creates the conditions for what Sergiovanni (1992) calls "substitutes for leadership." "Responsiveness to the norms of school as a learning community, commitment to the professional ideal, responsiveness to the work itself, and collegiality (understood as professional virtue) are four examples of substitutes for leadership" (Sergiovanni, 1992, p. 44). Hence, school as community emerges as an important theme, allowing growth in leadership capacity through professional development experiences created by the principal with the staff. Leadership, in the traditional sense, changes as the action of leading is shared among the community of learners.

Shared Vision – Ideas that Govern

Facilitating meaningful and lasting involvement requires a learning organization to have a shared vision (Senge, 1990). As one of the five disciplines, Senge defines shared vision as "a force in people's hearts, a force of impressive power. It may be inspired by an idea, but once it goes further – if it is compelling enough to acquire the support of more than one person – then it is no longer an abstraction. ... People see it as if it exists" (p. 206). A shared vision requires that the people involved have a commitment to a personal vision for themselves. Having a commitment to a personal vision that aligns with an organization (school) and its values develops true commitment, distinct from compliance.

Senge describes a "visionary leader" (p. 212) as one who encourages others to share their visions by taking positive action to create "a climate that encourages personal vision" (p. 212). This requires seeing the big picture, encouraging meaningful involvement, and accepting the risks implied in releasing the free thought processes of

others. Senge uses the metaphor of a hologram to describe how individual commitment to personal vision can contribute to the shared vision of an organization. Each piece of the hologram contains an image of the whole with unique components adding meaning to the whole. This contributes to the building of partnerships and relationships as commonalties are discovered. Members become "cocreators" (p. 212), which is in sharp contrast to notions of a traditional hierarchy wherein "vision emanates from the top" (p. 213). A shared vision becomes a building block that is dynamic and responsive to changing conditions. "Building shared vision must be seen as a central element of the daily work of leaders. It is ongoing and never-ending" (p. 214).

Fullan (1997) supports this view of the importance of creating a shared vision in presenting guidelines for action in school improvement. "Vision must be something arguably of value. It should be somewhat lofty and uplifting. It should have some concreteness" (p. 34). He describes a leader's role in school improvement:

> a fluid relationship in which the vision of the school is shaped and reshaped as people try to bring about improvements. It is a difficult balance, but commitment and skill in the change process on the part of the organizational leader and members is every bit as crucial as ideas about where the school should be heading. (p. 35)

Connecting people through shared purpose and meaning is the value of vision. Principals "have a responsibility and obligation to talk openly and frequently about their beliefs and commitments" (Sergiovanni, 1995, p. 163). They have a responsibility to encourage dialogue and meaningful, formative discussion. It is important that vision "be viewed more as a compass that points the direction to be taken, that inspires enthusiasm and that allows people to buy into and take part in the shaping" (p. 164) of the school's mission.

Vision, mission, values, and common purpose are tightly intertwined and all contribute to the cultural identity of a school. Senge (1990) delineates the distinctions between these in answering the central question, "What do we believe in?" (p. 224). Table 3.2 illustrates the way in which Senge relates vision, mission and values.

Table 3.2 Anchoring Vision In A Set Of Governing Ideas

Governing Idea	**Answering the Question -**
Vision	**What**? – What is our picture of the future?
Mission (Purpose)	**Why** do we exist? What is our contribution to the world?
Core Values	**How** do we want to act? Describe our day to day life ...

(adapted from Senge, 1990, p. 223)

Once the questions posed in Table 3.6 have been addressed and commitment and involvement begin to develop, the challenge is to ensure the vision is maintained and allowed to evolve with the common direction of the organization. "Visions spread because of a reinforcing process of increasing clarity, enthusiasm, communication and commitment" (p. 227). There is a need to ensure on-going commitment, often in the face of challenges and discouragement brought on by the realities of daily struggle and dealing with unpredictable crises that arise. Without care, these daily challenges can have a negative effect on valuing the common good. "One of the deepest desires underlying shared vision is the desire to be connected, to a larger purpose and to one another. The spirit of connection is fragile" (p. 230). Protecting this fragile spirit becomes an important role for leaders. Connections need to be seen through the eyes of the committed individual, who is willing to contribute, as well as through the eyes of other members of the organization. Senge (1990) draws from the work of Max de Pree who honors the need for balance in the lives of members. He describes the development of a covenant that has as its essence "the organization's commitment to support the full development of each employee, and the person's reciprocal commitment to the organization." (p. 311). Processes of reciprocity are central to the theories embraced by

the constructivist. The following section presents this perspective and emphasizes the importance of building leadership capacity. "Who are the leaders of learning organizations? They are the learners" (Senge, 1990, p. 360).

Constructing a Process Approach to Leadership

Constructivist leadership theories and related notions to staff collaboration, commitment, and involvement are relatively recent additions to the leadership literature. Constructivist leadership, as a theory, is related to much of the research that describes learning organizations and learning communities. What sets it apart is its primary concern for making it happen; a concentrated attention on relationships and the work that people do together. Lambert (1995) states that:

> Constructivist Leadership that entails
>
> The reciprocal processes that enable...
>
> participants in an educational community to construct meanings ...
>
> that lead toward common purposes of schooling
>
> is making things happen. (p. 51)

She refers to leadership as a verb, not a noun, where the emphasis is on "processes, activities, and relationships in which people engage, rather than as the individual in a specific role" (Lambert, 1998b, p. 18). In accepting this definition, there is potential for the redistribution of power and authority, where the formal leader facilitates and encourages other staff to get involved. This implies developing a "new understanding of leadership capacity [and sharing it at the school level] – broad based, skillful participation in the work of leadership" (Lambert, 1998b, p. 18).

Lambert's emphasis on leadership capacity challenges traditional assumptions about power relationships and leadership. "It needs to be a broad concept that is separated from person, role, and a discrete set of individual behaviors. It needs to be embedded in the school community as a whole" (Lambert 1998a, p. 5). The broad understanding of leadership suggested by Lambert and her colleagues requires

participants in a school setting to accept and value a professional perspective. "Leadership, like energy, is not finite, not restricted by formal authority and power; it permeates a healthy school culture and is undertaken by whoever sees a need or an opportunity" (Lambert, 1995, p. 33).

Leadership Capacity

Lambert (1998a) defines leadership capacity as "broad-based, skillful participation in the work of leadership" (p. 12). In her discussion of leadership capacity, she identifies four types of schools, classified according to their levels of "skillfulness" and "participation": (a) Low Participation, Low Skillfulness; (b) High Participation, Low Skillfulness; (c) High Skillfulness, Low Participation; and (d) High Skillfulness, High Participation.

Table 3.3 elaborates on the critical features of schools rated as high in skillfulness and participation:

Table 3.3 Critical Features of a School with High Leadership Capacity

Critical Feature:	Description:
Inquiry based use of information to inform shared decisions and practice	Formal and informal structures are used as initiators to provide meaningful opportunities for dialogue, sharing of information and reactions across the setting.
Roles and responsibilities that reflect broad involvement and collaboration	Teachers involved in reciprocity, reflection, gain chances to re-think actions and find commonalties with others as their concern reaches beyond the separated classroom to the school as a whole.
Reflective practice / innovation as the norm	Transforming ideas into innovative actions requires an atmosphere where reflection is honored and valued; sharing ideas leads to a willingness to grasp an opportunity.
High Student Achievement	Learning and success of students is the content and reason for being. As a critical feature, it drives the agenda for the work that develops from leadership capacity.

(adapted from Lambert, 1998a, pp. 18 - 23)

These qualities imply a significant shift in traditional roles, as teachers are engaged outside the classroom. In both formal and informal ways they become meaningful participants in leadership, and begin to accept responsibility for improvement and growth in their professional school community. This is a contributing factor to the increased complexity of a school organization. It "demands a more sophisticated set of skills and understandings than ever before. It is more difficult to build leadership capacity among colleagues than to tell colleagues what to do" (Lambert, 1998a, p. 24). Given this orientation, the role of the principal becomes one of facilitator, engaging in meaningful dialogue and constant analysis. "These learning processes require finely honed skills in communication, group process facilitation, inquiry, conflict mediation and dialogue" (p. 24).

Lambert goes on to suggest that, at times, it is useful to use the authority of position to point people in the right direction. She identifies a set of strategies to decrease dependency relationships and increase the leadership capacity in schools.

- Posing questions that hold up assumptions and beliefs for reexamination
- Remaining silent, letting other voices surface
- Promoting dialogue and conversations
- Raising a range of possibilities but avoiding simplistic answers
- Keeping the value agenda on the table, reminding the group that what they have agreed on is important, focusing attention
- Providing space and time for people to struggle with tough issues
- Confronting data, subjecting one's own ideas to the challenge of evidence
- Turning a concern into a question
- Being wrong with grace, candor, and humility
- Being explicit and public about strategies, since the purpose is to model, demonstrate, and teach them to others

(Lambert, 1998a, p. 27)

It is important to remember that leadership capacity is free of any specific content. The areas of attention are derived from the needs of the school expressed through shared vision. It relates to the over-riding mission associated with schools, "it is the

fundamental work of schooling that accompanies any reform effort – improving literacy, instruction, assessment, school restructuring, parent participation. To implement any innovation successfully requires strengthening the leadership capacity of the school" (Lambert, 1998a, p. 87).

At the district level, conditions that will contribute to maximizing leadership capacity include "... district-school relationships built on high engagement but few rules and regulations, as well as shared decision making and site-based management. Districts should model the processes of a learning community" (Lambert, 1998b, p. 19).

Collaboration and Staff Development

Teachers, from the constructivist perspective, if encouraged and guided into sharing a broader concern for the school as a community, emerge as leaders. Lambert et al.; (1997) comment:

> This approach that we have come to understand as making meaning of our learning, our work, is proposed as the central idea of leadership. If we view leading as facilitating the sense making processes in our schools we find that there are powerful implications for new roles, new work in shared leadership. (p. xvii)

The "shift" in working relationships is not always easy for teachers, who often think their influence is limited to students. They must be provided with the opportunity. "Without opportunities to build the capacity for working collaboratively, systemic change is not possible" (Lambert, 1997, p. 9). Lambert notes that a constructivist perspective holds promise to provide such opportunities. "Constructivist leadership provides the learning atmosphere in which individuals can collectively reframe their roles through continuous interaction and feedback from each other ... this engages the reciprocal processes among us, reshaping our relationships and forming communities of learners and leaders" (p. 31).

Assumptions about roles and responsibility begin to change. Relationships develop and networks form. "The greater the density of the connections among the school staff, which is characterized by both conversation and dialogues that construct organizational learning as well as shared work the greater the capacity to interact authentically with those in the environment" (Lambert et al., 1997, p. 55). Enabling staff members to participate authentically with each other is important if collaborative working relationships are to be achieved.

> Professional development aimed at preparing teachers for the constructivist leadership role must be constructivist itself – in both content and process. This entails providing teachers with the time, opportunity and expectation to work with their colleagues in critically examining the important matters on their work – teaching, learning, schooling, subject matter and school. (p. 146)

It is "a significant paradigm shift to expand the role of teaching to include work beyond the classroom" (Lambert et al., 1997, p. 149). To accomplish this shift requires adopting a new focus. Lambert accentuates commitment to collaboration as an important element of this revised focus. "The value of collaboration is underscored in an environment where people share ideas and work together to understand their complex and changing world" (p. 150). Collaboration and commitment to the school as a community "involves supporting both the risk-taking behavior of one's colleagues and the learning that is associated with that process" (p. 151). This implies building comfort with risk taking and the shared commitment to life long learning.

In their discussion of "job-embedded" learning, Sparks and Hirsh (1997) relate the value of professional development that "links learning to the immediate and real-life problems faced by teachers and administrators. It is based on the assumption that the most powerful learning is that which occurs in response to challenges currently being faced by the learner and that allows for immediate application, experimentation and

adaptation on the job" (p. 52). They claim that "Staff development is at the center of all education reform strategies" (p. 96).

Constraints and Future Challenges

There are many challenges today for leadership faced with a new and restructured environment. Financial constraints are a reality and the demands of functioning in an open system of external influences presents challenges. There is uncertainty, ambiguity, and a multitude of criteria principals must accept and deal with. "Principals are guiding the educational system along a road somewhere between bureaucracy and free enterprise. Today's principals are becoming transformational leaders, moving the organization from 'past practices,' to 'future practices,' a movement must be accomplished for the institution to survive" (Yanitski & Pysyk, 1999, p. 174).

Drucker (1999, 1993) recognises and directs attention to the pivotal role of the principal. He points out that the role of the principal in public education has changed; the culture of a school district needs to actively encourage the emergence of 'change leaders.' Principals, he notes, must recognise their abilities to meet challenges as "the school becomes accountable for performance and results" (Drucker, 1993, p.194). They are in a position to innovate while embracing parent involvement and accepting accountability as a given condition in operating and leading a responsive school. Leadership must be guided by a policy of continuous improvement. "Eventually continuous improvement leads to fundamental change" (Drucker, 1999, p. 81). The change leader orchestrates this change. By having a clear sense of common purpose and articulating successes and achievements with students, staff, and parents, they are able to "focus on opportunities. They have to starve the problems and feed opportunities" (Drucker, 1999, p. 82).

Drucker indicates the "change leader" must acknowledge the information revolution and learn to ask, "What is the meaning of information and its purpose? And

this is leading rapidly to redefining the tasks to be done with the help of information and, with it, to redefining the institutions that do these tasks" (Drucker, 1999, p. 97). Hence the emergence of the "knowledge worker" as "the most valuable asset of the 21st century" (p. 135).

The effectiveness and efficiency of this knowledge worker is important to an organization becoming a "change leader." The knowledge worker must demonstrate the learning and refocusing skills of organizing and sorting, selecting and eliminating data "and then to focus the resulting information on action. For, the purpose of information is not knowledge. It is being able to take the right action" (Drucker, 1999, p. 130). It is important to put the people closest to the action in the best position to create positive change.

Teachers as leaders, as professional knowledge workers, are charged with capturing the potential of the future in our students. "Perhaps the biggest challenge to professional development, and consequently the biggest challenge to the promise of change itself, is to instill images of the possible in the minds and hopes in the hearts of the teachers who lead" (Lambert et al., 1997, p. 173).

Summary

This review of the literature is intended to provide background information to this study of "Twinned Schools." The study is focused on leadership and the role of the principal. The twinning project presented an opportunity to learn from the leadership experience of six schools that were challenged while being placed in a position of adapting to change.

The review began with a description of the twinning experiences in Ontario by (Rees, 1996; 1998; 1998b; 2000). The research that was conducted in Ontario, though inconclusive, did identify potential in the concept of twinning and supported further

investigation. Rees identified a number of important factors for consideration, noting that with time and positive experiences, leadership models emerge to expand perimeters and support growth and evolution of effective participation under an articulated purpose. She identified the following advantages to twinning: improved programming, better use of subject specialists, opportunities for sharing expertise, a reinvigorated environment and more available resources, some reduction in operational costs, additional contacts for all members of the school community and a strengthening of long term viability. Her research advocates the importance of planning and preparation and acticulates the need for ongoing monitoring and evaluation.

With this as a point of departure the review turns to an examination of the progression of the research and understanding of leadership as a complex, multiple leveled phenomenon. This progression moved from development of leadership theory from a more traditional perspective to more recent developments in learning communities and the sharing of leadership. The distinction between leadership and management is made as a means of defining the larger arena of administrative concern. Contingency theory is examined and provides a framework from which to examine leadership qualities and behaviors. The important distinction between transactional and transformational interactions focuses on the task of redefining leadership and appreciating the range of possibilities when considering shared leadership. Sergiovanni (1992) confirms the need to identify and sort constructs of leadership to refine and apply them anew. The distinction between systemworld and lifeworld provides a parallel description of managing and leading, highlighting some of the limitations of traditional theory. The focus turns from individual in the sectioned off classroom to team as the metaphor for school progresses to a "learning community" – rather than strictly an instructional delivery system.

The importance of culture and community is tied into the leadership equation as the progression continues. Community and shared vision help create substitutes for leadership. These are characterized by meaningful involvement in acts of leading that encourage involvement outside the classroom. Sergiovanni, Senge, and others suggest that a shared vision creates collaborative opportunities for growth in a learning community. There is less hierarchy; values and purpose become the driving force.

Constructivist theory introduces the view of leadership as a reciprocal process and leads to the notion of building leadership capacity. Reciprocity provides the link that brings committed people with vision and an understanding of purpose together in meaningful ways of leading and, in doing so builds capacity for sharing leadership (the process) in collaborative ways. The critical features of a school with high leadership capacity are described as having high skill and high participation in meaningful ways. The central idea of leadership becomes "making meaning from our learning" (Lambert).

Important considerations about creating sustainable involvement, the changing roles of staff and their development, as well as growing accountability for performance are briefly introduced. In the non-linear often chaotic world of school leaders, they are required to deal with the constraints of reduced dollars and the complex demands of multiple criteria that comes with fundamental change and a commitment to continuous improvement.

The review concludes with a consideration of viewing and understanding teachers as leaders, as "knowledge workers" (Drucker, 1999), in the best position to affect meaningful change for the benefit of students, as a central challenge. Principals as "change leaders" must learn to starve problems and feed opportunity. It is the instilling of "images of the possible in the minds and hearts of the teachers that lead" (Lambert et al. 1997) into which this study strives to provide insight.

The Findings Chapters: Introduction

The findings of this study are organized into three chapters: IV) Accepting the Leadership Challenge – which provides an initial orientation to the study and describes a process of change, V) Leadership Growth – which presents the principals' experience and development, VI) Building Capacity – which highlights strategies and opportunities for meaningful involvement in leadership that occurred within the context of the twinning project.

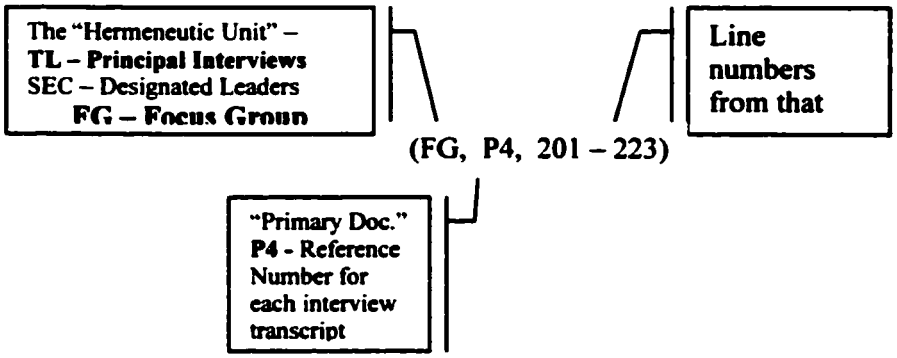
Having organized the findings according to these headings, I also recognize the complexity and inter-relatedness of the ideas and concepts. Many of the ideas described in a particular chapter relate closely to, or are influenced by, ideas presented in other chapters. There is, therefore, some repetition. Even so, I believe it is important to view the findings from the three perspectives implied by the titles of the chapters. "Accepting the Leadership Challenge" focuses on the development of the initial commitment to the change. "Leadership Growth" focuses primarily on the experiences of the formal leaders as they adjusted and reconciled to the changes of twinning. And "Building Capacity" focuses on broader views of leadership and the importance of shared involvement.

Based on the commitment of confidentiality for all participants in the study, matching individual principals or leaders to specific schools has been avoided. General profiles of the principals and the schools are provided within the context of the findings. "Designated Leaders," who served somewhat as assistant, or even co-principals, contributed perspective and add depth to the study; they are quoted throughout.

All quotes are referenced specifically to the raw data. This reference appears at the end of each quote. As outlined in the methods chapter, the data from the interview transcripts are indexed according to three "Hermeneutic Units." The first reference in each citation identifies this unit, the second names the "primary document." Each primary document is an interview transcript numbered (P1, P2, P3, ...). The referent

identifies the specific line number of the quotation. Figure 4.1 illustrates this referencing system

Figure 4.1 Quotation Reference



CHAPTER IV

ACCEPTING THE LEADERSHIP CHALLENGE

The focus of this research is on understanding and learning from the experience of leading in a "twinned" school environment. Twinning effected leadership in these schools and resulted in the need to define, renew, and re-focus on potentially effective ways of leading.

In this chapter, the initial leadership challenges are identified. The issues and contexts that influenced how decisions were made are presented. The principals describe their discoveries, their frustrations and the decisions they made as relationships changed and evolved. An important challenge for these principals and their staffs was first accepting a change in the traditional view of the principal role. Balancing time between the sites and meeting the demands and expectations associated with the role became an immediate and complex issue. The need for changes to and rethinking of leadership was obvious. Principals being unable to be in both sites at once precipitated establishing a team (with formally designated roles) to address needs and provide coverage. With their commitment and experience, the principals brought a desire to succeed and initiated a variety of approaches as they responded to their school's needs and provided opportunities for designated leaders to gain experience. The argument that leadership style influences how and what decisions are made is presented.

The section on "Steps in Start Up – A Process of Change," presents three important influential factors that affected the approaches to twinning introduced in these schools. Demographic differences and uniqueness, as well as initial decisions that focused the process of change are identified and discussed. The importance of the parents, their role and their understanding are brought forward as another influential factor that affected the actions of the principals.

The role of the school district is explored as the struggle to adjust and confirm purpose played out differently in each twinned setting. Concluding this chapter is a discussion about vision, as principals identified its significance as an important beginning for a process of change. The discussion deals with the paramount need to ensure their school vision captured the attention and support of the school community as the changes and adjustments occurred. The initial challenges described in the chapter provide an orientation to the beginnings of a journey for the leaders of the twinned schools.

The Role of the Principal

The principals were faced with the challenge of very carefully examining their roles and determining appropriate actions in the twinned schools.

The perception that principals are part of, and involved in, all aspects of school operations is generally held by parent and lay communities as well as school staffs. This view presented a particular challenge:

> As principals we have talked an awful lot this year about the perception of the role of the principal in the school and what in fact the perception of the staff and the parents is of what a good principal does. And if their perception is that a good principal is totally hands on and handles everything and solves all problems and deals with all the kids fired down to the office in a very expedient way immediately, then there's some difficulties. (FG, P2, 489-495)

The principals simply could not be at both schools at the same time. Principals were aware of the challenge this presented:

> There's some brain shaping that has to begin to change. And this was an especially big phenomena in some of our small elementary schools, where in fact the principal, the role of the principal seemed to be, the expectation was that they'd be hands on and they'd be there and they'd be doing, doing, doing for us as a staff. And it's changing that perception, that's so hard, because people see they're not getting the kind of service that they think they should be getting from the person whom they think they should be getting it from. (FG, P2, 496-504)

Often, the first approach to addressing this challenge was based on notions of "fairness" as equal treatment:

> When we went into it, we wanted to try and be as fair as we could to both the schools. And so taking a ruler and dividing right down the middle and saying that I'm going to try and spend 50% of my time in each of the buildings. (TL, P3, 68 - 71)

Although perhaps valiant in intention, this proved to be not possible in practice. Early on, this led to frustration for some of the principals:

> It's really evolved and it's quite a challenge. And I'm feeling quite frustrated with it, and I'm not feeling good about myself, nor about my role. And that may change. (TL, P2, 72 – 74)

Principals soon became aware that they could not cling to their or their staff's traditional views of the role of the principal.

Leadership Experience and New Opportunities

The principals involved in this project are all accomplished school leaders in their own right. They held leadership positions within their school district as assistant principals, consultants, district central senior staff, and principals with three to fifteen years of experience. Together they represent over 45 years of administrative experience. One of the principals pointed out that as a collective:

> We've got a group around here that if you added up all our years of experience, it's considerable. (FG, B, 26 - 27)

The past experiences of the principals are an important consideration in the sense that this determines, to a degree, their understandings and actions. One participant, for example, has previous district experience serving in a central, senior administrative position. As a result of that experience, he has a clearer understanding of district positions influencing this twinning project. He commented:

> I had the opportunity to view things from a school's perspective and to view them from a district perspective, where you have to do some gives and takes. I think that helped me with this assignment. I think it would have been more difficult to not only accept what we were doing, but to sell it to others, if I hadn't had previous district level experience. (TL, P5, 740 – 745)

All the "designated leaders" interviewed in this study had formal leadership roles in the twinned schools. Of the six (one from each twin), only one had previous experience in a formally designated role. The others were appointed as assistant principal or curriculum coordinator for the first time and as a direct result of the twinning initiative. Four of the five new positions were filled from within the schools' teaching staff existing prior to the introduction of twinning. As they became important support and leadership people in their schools, their roles also changed. For example, the assistant principal of a twinned school functions as a site level principal in terms of responsibilities and actions carried out over the course of any given day. This designated leader described the role:

> My role as a leader is somewhat obvious through an assistant principalship title, but I believe it's a different type of assistant principalship. I'm very much a principal at the school level, and yet I still have a true principal to rely on. (SEC, P5, 12 – 15)

In accepting the challenge of providing leadership in newly created twinned school environments, these designated leaders along with their principals accepted the unknowns, the absence of precedents, and the responsibility for setting direction and making decisions that would allow the schools to operate effectively and efficiently.

Style and Approaches: What is in an Orientation?

As a group, the principals represent a cross-section of leadership styles. Their individual traits influenced their approach to their situation. There were differences. There were also common elements in their experience that they brought to this assignment. As principals and leaders, they all value the principle of continuous

improvement and are committed to an on-going focus on student achievement and growth. As one designated leader observed: "We try to keep the main thing the main thing, and the main thing is, you know, what's going on with our school. What can we do to increase our student achievement?" (SEC, P4, 515-517).

Table 4.1 outlines my perceptions of, based on my analysis of the interview data, the differences in style of the six principals.

Table 4.1 Perceptions of Principal Leadership Styles

Principal	Defining Characterization/Preferences	View of the Twinning Project
A	• High visibility, hands on,	• A huge challenge, some misgivings
B	• Understand role, using authority when required	• Filtering, questioning, redefining role
C	• Influenced by literature – Lambert and the 4 quadrants	• Opportunity for renewal and refocus
D	• Accepting the district perspective, values the large picture, decisive	• Optimizing potential for success, establish a clear focus
E	• Autocratic, direct, open-minded, high expectations	• Take charge, meet challenges head on
F	• Accommodating, sensitive	• Over-whelming, challenging

Leadership style, as well as situation, plays a part in determining the approaches to decision-making illustrated throughout this chapter. For example, one principal noted that there was not always opportunity for collaboration. He explained:

> There was some decisions that needed to be made that you couldn't do in a lot of consultation, because you'd get 30 different answers. (FG, P1, 110 – 112)

Regardless of their style, the principals shared a determination to face the situation and all its challenges and possibilities boldly and with confidence. Moreover, by the end of the year the principals were engaging in far more collaborative activity. As one noted:

> I think when you're starting out, you need to take the bull by the horns and make some decisions. And it needs to be a sense of direction, a sense of where we're going. And we know that within the shared leadership process it's easier, like Linda Lambert shares this in four quadrants, and you want to be in that fourth quadrant. (FG, P2, 271 – 276)

Another also made reference to change and shared leadership:

> I was very top-down before, which I'm not top-down now at all. I'm very much shared. And the threat of being a shared leader is not there. (TL, P1, 661 – 663)

Process and Approach "Owned" at the School Level

The importance of communication and self-reflection are two ever-present themes that have emerged from the data and are woven into the sections that follow. As well, the participants identified time management as a resource that required careful attention. Its relevance is described throughout this chapter.

At this point it is important to recognize that these principals were not told how to approach the twinning. The superintendent expected that student programs and achievement would not be negatively affected. At that, the superintendent stepped back, placing confidence in the principals. This was appreciated and understood by the participants right from the beginning. As one principal noted:

He stepped back and let us find our own way. And I appreciate that, because that way you can put a lot more energy into it, because you're doing what you believe is the right thing to do and the way that you want to do it, so you don't mind. Whereas if you're just following instructions and you don't really believe in the instructions, it's hard to get the same level of commitment from people. (TL, P5, 461-467)

The principals had no precedents to rely upon as they started to develop their approach to twinning. They used each other as sounding boards and shared information

and ideas. This situation, with so many unknowns, presented many challenges. It also presented an opportunity to grow and discover strengths. At the mid-year data collection date one principal spoke of reward on a personal level:

> So personal growth, and also personal satisfaction that you're doing a good job. I think just to see it evolve and to kind of feel as a group, "We've been able to do something here. We were given a challenge and we've taken it on and put some good effort into it, and we're seeing results." And I think at the end of the day we're going to be able to say to ourselves, "Good job!" You know, we've achieved some things here and we've set a track record where if somebody else wants to try it again, at least they can look at what we've done and use that as a base to work from. (TL, P5, 768-777).

One of the designated leaders, thinking about the challenges and growth that she had faced provided this description of leadership based on her experiences and relationship with her principal in her initial year as a formal leader in her school:

> Leadership is tolerance. I think leadership is really listening to the needs of people, and you've almost got to be a sales person in the sense of, I believe a good sales person is somebody who hears what their customers want, and can supply those customers with what they believe are their needs, but supply it in a way that you really are addressing your goals and your own visions. (SEC, P5, 661 – 665)

The superintendent extended the invitation to these principals, expressed full confidence in their leadership abilities, and then stayed out of the way as they stepped into new territory. They were challenged to manage the changes and create models of school leadership required to meet arising needs and operate multiple campus schools. The twinning project presented the catalyst for change and encouraged thinking about new possibilities. The process of change is the topic of the following section.

Steps in Start Up – A Process of Change

The process of change and how the leadership experience evolved was different in each site. The principals had different issues and circumstances to address in getting their schools up and running. This section addresses three main areas of concern that influenced decisions and determined steps taken during the start up period. Demographics, initial decisions and the role of parents and their involvement in the school were predominant themes in the early stages of twinning. This section describes some of the differences that effected the way things took shape and the way stakeholder groups interacted and responded to the new conditions.

Demographics

Demographics, history, and tradition, as well as the people involved in the school, helped to define the situation and also had a role in defining the way twinning "played out" within this range of contexts. Summary descriptions of the schools are provided in Table 4.2.

Table 4.2 Twinned School Descriptions

Campus	School Description	
1	High School	a large high school twinned with a small high school
2	Junior High / Elem.	a small junior high twinned with a small elementary
3	Junior High / Elem.	a mid-sized junior high twinned with a small elementary
4	Junior High / Elem.	a mid-sized junior high twinned with a small elementary
5	Elementary	two small elementary schools twinned
6	Elementary	two small elementary schools twinned

In each of the twinned configurations, a small school is involved. A small school is viewed as having fewer than 200 students however, with elementary schools, that number can be as low as 80. A mid-sized school has a population below 500 students. The proximity of the "twins" to each other is also important. They could be as close as

200 meters and share the same site, or a significant distance of ten to twelve city blocks apart, located in different communities or neighborhoods.

These demographic conditions influenced decisions made as principals began to define how twinning would work at their site. Changes occurred as principals identified needs. One principal commented:

> It's so conceptual the whole thing. Do you know what I mean? It's so intertwined what we're doing here. There's no map for what we're doing, and it's looking at the individual needs of the school, the community and the teachers that you have and the vision that you have together and designing that. And it changes here. It's changing. (TL, P1, 721 – 727)

The principals recognized that, because of differences in demographics, no one approach would suit all of the twinned schools. One, for example, said:

> So it's pretty hard to say, "This is the way we're going to do it," when we've got so many different permutations and combinations of putting schools together, and some are working better and some are working not so well. (TL, P5, 414 – 417)

One thing of which the principals were certain was that change was a real and on-going force with which to contend. They also found that what would initially seem to be obvious ways of proceeding were seldom simple. This was particularly so with respect to decisions as to how to divide their time and effort. And even decisions of this nature affected relationships among the staffs in the schools. As one principal noted:

> As we started to go, realizing that one school was a much [more challenging environment]—in it's organization and also its needs—it wasn't quite as simple as just taking a ruler and dividing it down the middle. One school did take a little bit more time. And once that starts to happen, a little bit of I guess I can use the word jealousy would slip in about one staff feeling that I'm spending too much time in the other building, when I should be spending more time...you know. (TL, P3, 71 – 78)

Another principal referred to the need for flexibility allocating his time in the schools:

> I'm finding that as I set a specific timeline for me to be here and over there—and that's not working really well. I find that I need to be in different places, mostly here at the junior high. It's, as you know, junior high is very needy, as opposed to an elementary school. But just giving the time over there is really important, and I make sure I'm over there at least once a day. (TL, P2, 61 – 66)

Often size of school was an important factor in principals' decisions as to how they would allocate their time. The presence of a small school in each of the pairings also influenced the relationships between the schools in many ways. Principals saw advantages to this arrangement. As one said:

> Everything is larger at one site than the other and so that, it really is a David and Goliath in terms of two campuses, but that's really what makes for the appeal. (TL, P5, 5-7)

At the larger sites, program choices were broader; allowing the small site to provide additional choices for students who preferred or benefited from the small school environment. This was significant because, as this principal noted, a small setting has particular appeal for some students, and a large setting, to others:

> You know, to many it's supportive, it's warm, it's protective, everybody knows everybody else by name. Other students really prefer the larger setting, where there's always new people to meet new things to do, lots going on. (TL, P5, 14 – 17)

The benefits implied by this statement occurred when the twinned schools developed operational relationships, which allowed them to operate much like one school. That did not happen in all cases:

> It's not like our staff would sit and chat with each other, it's just, you know, oh, how's things going? How's your class this year, kind of thing. It's not the closeness that our staff has. And I don't know if there's anything that you could do to ever bring both staffs to feel as one just because of the being in two different locations. (SEC, P2, 360 – 364)

This designated leader was noting that the distance between the two schools was an important factor in determining the relationships that developed between the schools.

Being close by makes coming together easier and more natural. However, even when the twinned schools were in close proximity, there were challenges to be overcome in developing the relationship between the schools:

> The proximity of the two schools helps a little bit, but I'm of the firm belief that it could be two to three blocks away: it matters not. It's still two separate facilities and all the concerns and problems that go with that. It matters not about the distance between the two: you're still dealing with two totally different schools. (TL, P2, 16 – 21)

In the case of the junior high – elementary twins, there seemed to be a more meaningful relationship, particularly when the elementary feeds into the junior high. As on principal noted:

> It's a feeder school. They're just barely three blocks apart, if that at all. It's the same neighbourhood. The kids will...Ninety percent of them from the elementary will go to this junior high. It's the same parents: it makes sense to have one parent council. (TL, P3, 203 – 207)

This natural connection created a meaningful relationship that contributed to people understanding the rationale behind the decision to twin the schools. As noted, some operational decisions were straight forward.

Close to the completion of the initial year, the principals reflected on this as a sort of general principle:

> I think it's important that the schools complement each other. For instance, if you get two really small operations that are really struggling and you put them together, you've just got a combined operation of two small sites that are both struggling. And if you find schools that somehow can combine their strengths to be stronger overall. (FG, P1, 454 – 459)

> I think you have to look at them when you are looking at the twinning situations—is that they have to have something truly in common. (FG, P1, 417 – 419)

They also noted that when this logical connection is not evident, the challenge of bringing the schools together with purpose and meaning becomes more intense. One principal noted that when twinning small elementary schools, even the smallest issues present considerable challenges to be overcome:

> In having two different buildings there's also two different traditions you've got built in. Just looking at one, they have their assemblies chaired and it's done at a certain time, and there's always some performing that happens. Then at the other they have assemblies and parents are invited to come. And so there's a lot of things. (FG, P2, 693 – 698)

Introducing the change that twinning presented created complex challenges that required careful thought about how best to proceed.

Initial Decisions

Initial decisions made by each of the principals shaped the nature of the twinning at each site. These initial decisions were a response to one central question: "Are we one school or are we two schools linked together?" One principal began addressing this question during the first staff meeting by confronting directly the question of whether they should be twinned. In doing so, he helped the staff focus on what they could control and thus avoid expending energy where there would be no return or benefit for their students. In his words:

> Probably what helped initially more than anything else was to eliminate all of the discussions as to whether this was something we should do or shouldn't do, because you can waste a ton of energy and a ton of time and build up a lot of resentment by listing all the reasons why we shouldn't be doing something, when we're going to do it ultimately. And so I went into that first staff meeting back in August—and our staff meetings are common, so we had everybody at one place at one time—and let people know that we had been given a challenge, if you like, an assignment on behalf of the district that we were part of an initiative that was studying some new directions and whether you think it's the right direction or whether you think it isn't, isn't

> really the issue. The issue is that we have, they've given us, this assignment and this is where we are and our challenge is to find a way to make it work well. (TL, P5, 256 – 269)

This principal delivered an important message. He placed students at the center of the discussion and focused teachers on their learning needs. Noting that the common staff meeting had already been established, he followed up the communication about the nature of the twinning challenge by clarifying the strategies to be put into place to make a combined operation.

> Right from the outset to establish that it was one school. Not two schools, but a single school, and everything was combined: single budget, single staff, single student body. (FG, P1, 56 – 59)

> All the resources were common resources, all the teachers belonged to the same subject area departments, it was just very much a common resource base that everyone drew from and it took away any competition and took away from comparisons. (FG, P1, 66 – 70).

This principal was very committed to making the assignment work as well as possible and employed careful thought and planning to arrive at these framework-building strategies. He was also aware that challenges would arise and need to be handled:

> We started out the year saying that there were a number of key points that we had to address, if we were going to be successful running two campuses. And we talked about the challenges of communication, of transportation, of both students and materials, and staff that shared resources, developing a sense of unity. (FG, P1, 355 – 360)

Early in the process this principal committed to the language of "us" instead of "we" and "they" and modeled it at every opportunity. These early decisions and the careful delivery set a particular tone. As he stated:

> We won't have any difficulty making the right decisions and looking at things the right way, and getting rid of the 'we's' and the 'they's' kind of thing, because it's all 'us.' (TL, P5, 118 – 121)

Another principal took the position that, initially it was important to get a job accomplished expediently without a lot of input. Accordingly, he opted to make some initial decisions prior to the beginning of the school year. In his words:

> There was things that I just wanted to put through right away, which was the one staff with one budget with one PAC, it's one newsletter, it's one everything. And have staff teaching back and forth to each campus, so that we brought them all together. I think that was key to getting the thing off the ground, so it started to have some direction and momentum. And I think if we took too long trying to find out what could work and what wouldn't work—there was no model to go on—it would have really "bungled" on us. I think it was crucial to get it up and going. Some of those key decisions needed to be made right off the start. (FG, P1, 113 – 123)

Although he confronted some resistance, he found that, once he shared his rationale with staff, they accepted his decisions.

> There was some resistance, but not something that you couldn't convince them that it was the way we were going and it's necessary. And once they heard the rationale, they were satisfied. "Yeah, it's time to move on." (FG, P2, 794 – 797)

This principal was willing to use his authority in an autocratic manner. He felt that this ensured that energies were expended in productive, forward moving ways. Although other principals pursued less autocratic approaches, the "one school" direction was an important "initial" decision.

From the outset, it was obvious that this "one school" direction would be harder to achieve for the principals working with two elementary schools. One principal described the challenge as follows:

> One principal and two separate buildings, moving towards one—and I say moving towards, because of being separated by the kinds of demographics that we have with these two schools is that

> we have two different clientele. Completely. And they don't mix that well. (TL, P3, 150 – 153)

Despite these challenges, the decision to persist with the "one school" direction paid off. Again, the sense of process is alluded to. By the end of the year, the staffs were beginning to connect. For example, resource sharing between the two schools was, by then, a regular occurrence.

> If they need a novel study now, it's nothing to pick up the phone and phone the other building and say, "Do you have this novel study?" Or, "We're planning a field trip. Are you interested in going? We don't have enough." So there's that kind of thing. There's resources going back and forth constantly, and I know, because I'm the mail person. (TL, P3, 449 – 458)

Paradoxically, another principal found that, in moving toward the "one school" direction, it was important to honor the identities of the individual schools. He observed:

> I found that out when I first took over the elementary, it has a culture all unto itself. And it truly wanted to stay its own identity. It was afraid of losing that identity by being swallowed up. So I've done a lot to make sure it keeps that identity. (TL, P2, 21 – 25)

Given this commitment, these particular schools were linked but clearly separate in everyone's mind. While honoring the identity and maintaining separate operations, the process of building relationships between the two schools was initiated. The principal commented that:

> [One thing] I did keep separate was staff meetings; they are separate. I would not put them together, because I feel that that would be a waste of time for both staffs. I kept parent/teacher interviews separate. I did not amalgamate them, so when it's parent/teacher night I'm here for four nights: two over there and two over here, which makes for a very, very long week. Parent advisory is separate as well, to keep that feeling that they wanted. (TL, P2, 47 – 53)

> My decision was right off the start that we were going to be linked with the fiber optics and that every teacher would have a computer on their desk. And the smaller school was reticent with

> that. They didn't think that that was necessary, but we went ahead with that and now they really...I don't know if they could really live without their computers. The communication has picked up. (FG, P1, 139 – 145)

This principal was really focused on the people in his buildings; he was very concerned that those around him understood his intentions to honor traditions. He was determined to serve everyone's interests.

> I needed them to know that this school was just as important as this one is. They were afraid of this was my school and that was just an add-on to my responsibility. And they needed to know that I was committed to them; that I was their principal, too, and that I would do what I could for them. (TL, P2, 366 – 370)

This principal seemed to operate from the belief that the relationships and adjustments that were beginning to define twinning needed time to emerge and develop. As a designated leader in his school commented:

> I think what he really wanted was to be very supportive this first year, because I think he felt that a lot of the problems that are being sent to the office should be dealt with in the classroom. But he didn't feel that was something he wanted to do the first year. So I can say that things have really changed for them. (SEC, P1, 170 – 178)

This principal sought to foster change within a supportive, caring environment.

Another principal stepping into a new and unfamiliar assignment, but with confidence and a high level of efficacy took a different approach from the others. He began by making it clear that he didn't have all the answers. He also made sure that staffs understood that mistakes were likely to be made. At the same time, he encouraged his staff to get involved and be part of the leadership equation. He set a tone encouraging mentoring that was to be part of the redefining of roles and the sharing of leadership. In his words:

> From the beginning I said to all of all our staff group, the whole group, that I don't have all of the answers and really that I'm counting on everyone working together to come up with solutions

> to issues as they arise. That, I think, set the tone for some people, the willingness of some people to step forward and take on little projects and show initiative. (TL, P4, 218 – 223)

Principals made important decisions at the beginning of the twinning project that influenced the process of change. Initial decisions played a role in determining how principals worked with their staffs and how they took steps to build relationships. Initial decisions about how to bring staffs together varied. They all embraced the direction of a "one school" operation yet took different approaches at the beginning stages to bring this about. They focused energies toward students and learning and equated this with being successful in the initiative. Approaches included a more autocratic approach, seeking support by providing rationale after decisions were in place, to a slower approach, where individual identities of the schools were honored and preserved. People were encouraged to step forward and be involved. The principals did not have all the answers and endeavored to set a tone conducive to participation, involvement and acceptance of the challenges inherent in the new organization.

Parent Involvement and Support

Inherent differences between two twinned schools are often determined by program and demographics and can form barriers that prevent the bringing together of the two. It is important to recognize the diversity in the school communities when considering parents and their role in schools as twinned organizations take shape. All of the principals found parent support and involvement to be an important aspect in developing successful twinned operations. In this section, the emergence of the formal school council and the less formal, but equally important individual parent involvement and interaction with the school, will be considered. Principals in this twinning project experienced two extremes in this regard. In some cases, two parent councils smoothly merged into one. In others, differences were so pronounced that councils remained separate and distinct.

> They don't mix that well. If they were in the same building, they'd have no choice. But the parents in both haven't come together, so we have two parent councils. And they're two separate parent councils. We've actually tried to get where one parent will move and go to the other parent council's meetings. We did that a couple of times. It hasn't continued. We'd still like to continue and get it to happen more often. One parent council is very active: fund-raising, supporting, in the building constantly, volunteering. (TL, P3, 154 – 160)

In one case the principal had to deal with differences in values related to fund raising. He commented:

> At one school we have a very active parent group involved in high level fundraising—casinos, that sort of thing—and some of the interesting things there are, some of the things that the parents want or perceive as needs are ways of enriching the program at at the school, and so they provide funding for musical instruments, artist-in-residency type programs, those kinds of things. So the children at that school get fairly, what I would call enriched, kind of program, with incredible musical instruments that they all can play. (TL, P4, 46 – 54)

In the other school, the parents were interested and wanted involvement, but would not fund raise at this same level. They were politically and ethically opposed to casinos.

One principal, recognized that the resistance to uniting parent councils was rooted in the efforts a parent council had made over the past few years to retain the identity of the school. He, nevertheless, remained optimistic about the possibility of the council uniting. In his words:

> The parent group at the one site wanted to maintain a separate identity, because they had been fighting for years for their own existence. And they didn't suddenly want to give it up. Nor should they. But now we're starting to have some common meetings, so the parents, I believe by next year, will have one parent group in two locations, which again will be a real gain. (TL, P5, 761 – 768)

All the principals valued involvement of parents as a positive influence on school, children, and programs. In some cases, however, they found that the amount and nature of involvement varied between the two twinned schools. As one commented:

> The other building we're laying out goodies for them to eat. Hook, line and sinker and trying to draw them into the building, and we can't get them to come in. So one parent council is extremely viable, active; the other one isn't. So they look at each other, you know, "Do we really want to get together?" (TL, P3, 164 – 169)

There were, however, clear examples of parent councils working to accommodate the new twinned organization.

> The nice thing about that though is that the parent advisory have been super about it. They told me they could meet whenever we want, at lunchtime: we don't have to come back in the evenings. And we have one parent in the elementary who is also part of our parent advisory over here. So that's kind of met the needs. Things will probably change next year when I do things differently. (TL, P2, 55 – 61).

Despite the challenges faced in bringing parent councils together, principals persisted and remained optimistic. As one commented:

> I guess I'm quite optimistic, because I would really like to see having one parent council, instead of having two separate ones. Right now, we're both doing fund-raising and we're collecting telephone books. And that's something that we should have done together, but they're still leery about...You know. There's no vested interest in the other building for these parents. (TL, P3, 195 – 201)

In another case the principal attributed success in uniting the parent councils to his taking the time to engage in dialogue and build relationships with parents. In doing so, his workday often extended beyond traditional hours.

> One of the things is bringing a parent group together and that's taken more time. We've become one parent group; some twinning groups have two parent groups. In my building relationships with parents, I spend a lot of evenings and time dialoguing with them, going out, making sure they understand the

> business of the school, talking to them on the phone every night, all those kinds of things. So it has been a real strong, purposed mandate, shall we say, to get people on board. (TL, P1, 331 – 338)

He observed that the parent councils coming together has had positive consequences:

> I certainly find it most exciting how we have developed such a positive parent group. This school has not had a positive parent group—either one of them—in the past. There's been problem after problem, phone call after phone call downtown. That is almost nil. (TL, P1, 397 – 401).

Another principal took a more direct approach to uniting the parent councils. He explained that:

> They were very concerned about it. They wanted to have their own identity, and we had sort of talked about how no one needs to bring identities. We were one school. And so I guess it's just being adamant and putting your foot down and saying how this is what we're doing. And I think I used a sort of closure and leverage to get them to think that, you know, this is reality. This is going to happen. If you don't like it, one of the areas that ... the school board's concern could be closure. And if this doesn't work, I don't know what else would. (FG, P2, 70 – 79)

Matters related to parent councils were of vital importance to the twinned schools. Principals noted, however, that interactions with individual parents and community members were just as important. Because the change to twinning had been mandated, principals were not surprised that parents were often suspicious and concerned. Accordingly, they endeavored to make themselves available to parents who wished to discuss concerns.

One designated leader described how the principal helped parents resolve issues related to their elementary school having been twinned with a junior high school.

> He had quite a few people in his office at the beginning, some nervous parents wanting to make sure that junior highs wouldn't be scaring their children because they're used to a primary school, so that, I'd say the junior high influence was probably the thing that caused most parents the greatest discomfort to begin with. So I think a lot of time was just spent sort of smoothing the waters a

> bit, and just trying to keep things calm, being pro-active. (SEC, P4, 229 – 232)

The principals noted that it was important to ensure, throughout the transition to twinning, that communication strategies were in place to keep the community and parents informed. Some of the twinned schools worked to develop specific strategies in this regard. One principal described a revised strategy using newletters:

> Some of the needs have to do with methods of communicating and ways of getting the word out about what's happening at the school. We've undertaken weekly newsletters as a way of trying to build some anticipation with parents of news coming out each week about each of the schools individually. And that communication I think has helped us. (TL, P4, 38 – 45)

Principals recognized that a strong communication plan allowed the school to reach out in a very deliberate manner, making sure that suspicions and concerns were addressed openly and directly. One of the designated leaders saw communication as central to leadership:

> I believe that communication is a number one must in strong leadership. Communication with the parents, communication with the kids. You may be trying something that you have no clue is going to work, but I believe in being up-front, and being honest with the people that you're dealing with, and if you are, and it doesn't work, oh, well, at least they know that you didn't have any hidden agendas in the process. And that has gone a long way with us this year. (SEC, P5, 665 – 671)

One principal saw opportunities to interact with parents one-on-one as an important and powerful strategy. He saw these interactions as opportunities to influence and strengthen partnerships to support the learning of students.

> When parents come in and approach us and they see something that they're concerned about, and our first statement is we know that you know your children, your child, better than we do, and we need to really listen to you and find out what you've got to share, so that we can take that and work together on it. And then through that process I ask them what it is that they suggest we could do, you know, with our program to make it more effective or whatever the need is. And through that dialogue, we hope to

> empower them to take something away and do something about it and assist us with it. And we're finding that that is what is happening. (FG, P1, 309 – 319)

Principals recognized that it was very important to communicate information about changes. One example was to ensure that, from the outset, parents understood the role of the designated leader. The following principals described the need to know who was responsible:

> They want to have that feeling that there's somebody in charge, and call them a curriculum coordinator, assistant principal or principal, but they need to feel that there's somebody else that's going to support the teachers when they need that help. (FG, P2, 423 – 427)

> Introducing something like a curriculum coordinator into a school that never existed before, the parents had to be educated: what is this? So the first number of phone calls they said, "What is this CC stuff anyway?" They had no idea. Soon they began to understand that it was something like an assistant principal, and had some part of the admin team. (FG, P2, 102 – 108).

Principals also realized the need for clear communication extended beyond the parents to the larger community as a whole. Given the nature of the twinning project, many community members were not aware of the rationale and had legitimate questions that deserved attention. As one principal observed:

> And the question will arise, still does arise, you know, out of our 204 schools, there are 195 or more that have a principal. And then there's a handful that share a principal. And the question comes out, "How come we have to make do with half a principal and other schools get a whole principal?" And that's a question, and it's an interesting one. (FG, P2, 553 – 559).

Principals found parent involvement and support to be crucial to the success of their twinned schools. In some cases, this happened naturally, with parent councils uniting very early in the initiative. In other cases it was far more challenging. Despite any challenges, principals persisted in their efforts to unite the councils, and most experienced at least some success. Principals also found interactions with individual

parents and community members to be as important as their work with parent councils. Being open to and available for meetings with concerned parents was important to their success, as was putting in place formal means of communicating information about the change.

District Support and The Dynamics of Working through Limitations

After the district announced the decision to twin the schools, and assigned principals, they were provided with time to redevelop school plans and budgets. The principals were encouraged to be creative and consider nontraditional approaches to organizing that would potentially be appropriate for their school communities and students. They were promised support from district services and monitoring and planning departments. Principals, however, were assigned responsibility for finding strategies to ensure twinning worked effectively in each of their situations. The principals openly accepted this challenge:

> Probably the start-up was the most exciting, because we were given, at the beginning, pretty much free rein on how we wanted to organize it. And then a lot of that free rein was taken away by the limitations so we then had to start to conform to existing processes that were there. (TL, P3, 259 – 264)

This "free rein," subsequently was constrained in at least two ways. First, changes were made to district-wide policy regarding the organization of the instructional week. The twinned schools, in the first year of operation, were given flexibility to modify the organization of instructional time to create additional professional development time. As a result, a number of models emerged. One school created 4.5-day weeks and used the other half-day for joint professional meetings. In another instance, instructional time per day was increased slightly to free three additional days for professional development. Principals felt that this opportunity to establish additional professional development times created a positive advantage by providing extended time for bringing both staffs together. One principal expressed it this way:

> When we were granted the three extra professional development days, that was as far as I'm concerned, if you ask my staff that was the one crucial area that brought the staff together over the school year. (FG, P1, 30 – 33)

Into the second year, much of that flexibility was to be reduced, as all district schools including the twinned schools were required to follow a traditional 5-day school week. The response to this was not positive:

> They did support us in wanting those five PD days, so they did let us have them, [Now] those are gone. They are gone; we won't get those again. They took $60,000 right off the top of the budget, and we won't see that again. So I don't have very positive feelings towards downtown about this whole issue – I really don't and they wanted evaluation, they wanted feedback, but it was already set in stone that this would stay. (SEC, P1, 274 – 283)

The second constraint to "free rein" occurred gradually over the course of the year as it became apparent that some of the unique characteristics of twinned schools did not fit well with established district-level practices. For example, all schools in the district have their own "Decision Unit" (DU), a numerical identification used to regulate and monitor the flow of all types of information, including financial information. One principal described how this became a problem:

> I ran into some problems with that right from day one, because nobody else knew: a) how to do it; and nobody else knew for sure whether this was just me saying this is the way it was going to be or whether it had the Superintendent's blessing. Because you know, essentially he was kind of watching over what was unfolding as well. So when I'm saying things like, "I only want one DU number. I don't want two DU numbers." Well, first off, the only one who can do that is Alberta Learning, and nobody had given them any directions that we were going to ...Because if you take a DU out of service, a location number, that's like closing a school. And nobody was going to be talking about closing a school so that you can have one. And so we finally got around that by having one active DU and one silent DU. (TL, P5, 681 – 693)

The frustration that principals felt about issues that arose from their interaction with district level practices and personnel is obvious in this principal's comment:

> The person who was in charge of it basically just kind of said, "Here it is. Do it. We don't have any expertise at it, but you just try it." (TL, P2, 522 – 527)

Despite their frustrations, principals acknowledged that district level personnel were not trying to be difficult. They were simply having to make decisions based on policies that were not designed to serve twinned schools. As one principal said:

> I really haven't come across anyone who would say, "I don't support this." Or you know, "I refuse to work with you on it," if you like. (Laughter) But we've run into difficulties. And the difficulties have been—the one that I sort of alluded to earlier—there is no policy statement anywhere. There are no guidelines as to how the heck you deal with twinned schools. (TL, P5, 663 – 668)

This same principal, while understanding the problems twinning created for district level personnel, was not prepared to have his twinned site treated as two separate schools, particularly in regards to reporting achievement results. He noted that:

> Essentially, they're trying to find ways to deal with me, you know, in many cases. (Laughter) Because I just said, "I will not do it." And I said, "If you insist, here's what I'm going to do. If you insist that I give you separate results for one group of our population and separate results for the other group, I'm going to merge them all and then I will take 10% of that here and 90% of it there, and the results are going to be identical. And that's the only way you're going to get two sets of results. (TL, P5, 714 – 720)

Actions such as this resulted in changes. In particular, "Silent Decision Units" were configured to allow for twinned schools to be treated as one school. More generally, district level support improved over time as personnel spent time in the schools developing solutions to address the specific operational needs of the twinned schools. In spite of this, perhaps out of frustration, or stemming from a lack of effective

communication, some principals remained critical of the level of district support that was available. As one observed:

> We went through some real difficult times last year as we set up for this that didn't need to happen. ...People downtown have been reluctant to put things together to help us. ...Just by being part of the project, I think that we needed to receive a little extra help, a little extra consideration, because what they're asking us to do is really difficult and it's very time-consuming. (TL, P2, 529 – 539)

Throughout the year the frustration or tension referred to above characterized relationships between some of the principals and central services. Much of the tension seemed to hinge on differing perceptions of the goals and purposes of the project.

Table 4.3 includes goals of the project as presented to the school board for information by the superintendent of schools. These goals clarified that allocation savings, resource sharing and educational opportunities were to occur without compromising the quality of instruction. In addition, twinning was "officially" promoted as an opportunity to take risks and discover new understandings about leadership.

Table 4.3

Goals of the Twinning Pilot

- To provide cost savings that allows small schools to operate at the same funding level as all other schools in the district.
- To ensure that the cost savings occur without effects to student learning and teaching in the classroom, and to capitalize on the educational opportunities enabled by twinning for students, staff and parents
- To more effectively utilize resources in twinned schools
- To increase the viability and to ensure the continued existence of quality small schools

(EPS, Twinning Schools Pilot Evaluation, 1999)

The principals, however, were not entirely clear about the purpose of the twinning project. This led to considerable miscommunication. For example, some principals read a considerable amount into a memo they received which referred to twinning as a "pilot project." There was considerable collective uncertainty. Consider these comments made by two of the principals:

> Some of the schools, we communicated that this was a one-year pilot project that could be cancelled. Some of them we communicated as a project. Some it was a pilot project that we didn't know, you know. Open-ended. And I think having some of these strategies in place might assist us in having some relationships with the community. (FG, P1, 542 – 547)

> The challenge has been to have a clear vision of where we're going, because they've got a lot of uncertainty. And all that uncertainty is coming from our own district, you know, because if our district came out and said, "This is the way of the future for these two locations. For the next, you know, foreseeable number of years, this will be one combined school." But we've never had that, and partly it's because it's never been called a pilot, but it's sort of called everything else around it, like an "initiative" or whatever. But nobody ever said, "And what happens when the first year is over?" Or what happens two years or three or five? Or is there a number? And under what conditions would we undo what we've done here? Can there be a divorce in our future? I mean, nobody...Those rules don't exist. (TL, P5, 388 – 400)

There was no common message from the district that was delivered to the public or community at large. This principal felt that having no such message created problems at the school level:

> In terms of optimal conditions I think one of the things is we have to be clear as to what the reason for the twinning is. I think there was a little bit of uncertainty there that got in the way when we were starting up, in terms of whether it was to save money in terms of operating a combined operation or whether it was to prevent a closure or whether there were other rationales. I think it really helps the people at the site. They know why they're undertaking the particular change in structure. I think it's important to involve stakeholders early in the process. (FG, P1, 444 – 453)

Other principals expressed the same sentiment:

> Looking at the definition of twinning and what is the district's role for twinning in the first place. And I think that's one of the things that...Because when we started, I don't know if we really knew all the parameters that were involved in this. Was it just the saving of a principal and having one principal going between two sites or was it really the melding of two schools? And dealing with, trying to make the school—if you're looking at the

> optimum—to make the schools fit in as many ways as they can together, before you put them together. (FG, P1, 484 – 492)

Principals and others seemed to be left to draw their own conclusions related to purpose. Not all reactions were positive:

> I mean, the number one reason why they put it in was to save money. I mean, that's really a sore spot with me now, because I wouldn't have to cut a staff, as I'm going to have to do on my budget, if I still had my $69,000 they took out of my campus. So that is a detriment to it, and I don't think that we're seeing much of a response from senior staff. (TL P2, 318 – 323)

As noted here the frustration was exacerbated by budget reductions which accompanied the twinning. (The larger student population of the twinned school resulted in sharp reductions in the "small school grant.") Principals felt that all the additional work and challenge of getting a twinned school fully operational required additional care and attention, including additional funds, that they were not, in turn, receiving from the district.

Generally, the principals felt that this reduction in allocation was in conflict with the needs and requirements of a twinned operation. In the words of two of the principals:

> Because there were six and because part of the rationale for establishing was that it would save the district money, there had to be some demonstration of fewer dollars being spent. But I think that caused some extra hurdles that we had to overcome that would have made this transition a lot smoother if we didn't have to also bite the bullet quite the same way. (TL, P5, 801 – 807)

> We felt we needed some start-up money and we weren't given any. So what happens is you go ahead and you do some of the things anyway, and you just put yourself deeper in deficit (TL, P3, 332 – 335)

The principals responsible for the two small elementary twinned configurations found the reduction in allocation most challenging and frustrating.

> Money. Budget. You know, when you have two small schools, and then they take money away from you— We lost part of the small school grants, because by taking the two small schools and

> putting them together, your enrolment increases...and your small school grant is quite a bit less. Well, they figured that we couldn't operate on that, so they gave us half of the money they were going to take away from us. So we ended up losing $70,000. (TL, P3, 274 – 284)

This section has addressed the role that the school district played in initiating and supporting the twinning of twelve schools under six principals who struggled to find a clear understanding of the purpose of this project. They were not provided with an emphatic statement of the purpose of twinning or the reason their schools were selected to be involved in the reorganization.

Despite the frustration they felt with their relationship with central services, the principals took a positive approach in the face of challenging situations. For example, when the district rules required that they change their approach to finding time for staff development, they did so. And they reluctantly accepted the loss of financial resources tied to small schools and downplayed the resistance from colleagues that resulted from that loss. The principals were also aware of difficulties district personnel had in responding to new demands that did not fit traditional district operations.

Vision for Twinning - In the Hands of the School Leaders - "Designing the Map"

For each of the principals, the importance of "vision" was brought into focus as the school communities began a change process that created excitement and support during initial successes, but also concerns and resistance in light of new challenges. That it did so aligns with the literature which clarifies that it is important for leaders to take an active and encouraging role in the development of a vision that acts as the binding agent to maximize involvement in a united direction (Sergiovanni, 1995). One principal put a "street-level" perspective on the challenge of creating a plan and a strong vision:

> It's so conceptual, the whole thing. Do you know what I mean? It's so intertwined what we're doing here. There's no map for what we're doing, and it's looking at the individual needs of the school, the community and the teachers that you have and the

> vision that you have together and designing that. And it changes here. It's changing. (TL, P1, 721 – 727)

This section describes the principals' commitment to developing vision, as well as some of the processes they initiated to develop visions. As noted, the district was not prescriptive regarding vision – it was clearly in the domain of the school and the leadership there. This fits with Senge's (1990) notion that "Building shared vision must be seen as a central element of the daily work of leaders. It is ongoing and never-ending" (p. 214). It is important to consider the principals' different situations, orientations and experiences when examining their actions as visionary leaders.

Senge also speaks of personal vision as an important ingredient in the creation of shared vision in an organization (or school). One principal focused on his own professional growth as he reflected on vision and the challenges of the twinning. "This has helped me clarify what is really essential in our enterprise as a school" (TL, P4, 685 – 687). He was involved in a reflective process that demanded of him that he take action. For him, clarifying vision was central to his leadership:

> I think the other ways that I've approached leadership, is clarifying what our vision or mission is. And early on in the year again we went through an exercise of defining what our mission is as a staff, our mission as a staff for children. (TL, P4, 235 – 239)

He put processes in place and monitored them. He set some initial parameters for staff to consider as they discussed purpose and the vision of their newly twinned schools. He adopted a strategy of first developing two mission statements to honor the differences between and uniqueness of each of the two sites. As the two vision statements developed, it was a natural progression to identify commonalties between them. They were more similar than staff originally thought they would be. The principal described this process as follows:

> We had to kind of do a little bit of walking around in the fog for the first little while; what needs to happen? And that's where I

> decided we needed to really be clear about a mission for each school as a way of clarifying that. So each school made their own mission, but there were a couple of elements that I felt were really important and needed to be part of it, and one was, had to do with service, that we wanted to really develop the concept of service in our children to each other and the outside community. And so that's part of our mission at both schools. And if you look at the mission statements, they're quite similar. (TL, P4, 246 – 255)

The principal observed that, throughout this process, his key role of discovery was as a communicator, attending to individual and group discussion. This led to a greater understanding of purpose and established connections. Another principal spoke of the need for a careful and open examination of strengths and weaknesses:

> I think we took a step back and we looked at who we were. It was really important for us to understand who we were. And so we did do that; we talked quite a while about how we each performed before and after. And what were the good things that we saw there and what were the things that we saw that we didn't feel that worked well. So I think laying those on the table were really important. And going to the next step: what do we want to look like now? What do we want to become? (TL, P1, 732 – 739)

Principals were also aware of the importance of one-on-one communication. One commented:

> As far as, you know, relationships and communication it's been me really doing a lot of one-on-one relating to staff, going to each person, checking in. Tugboat, you know? "You're the professional here. My job is to give you the tools. What are the tools that you need to do this job?" And we talk about that a lot. (TL, P1, 309 – 314)

The principals of the twinned schools constantly reflected, communicated, listened, and considered as new operating methods were put in place and, as identities began to reemerge. They accepted that relationships, vision, and purposes needed time to develop. "It's a very slow process and it's done more one-on-one than any kind of formal meeting" (TL, P4, 420 – 421).

Although the principals saw themselves as facilitating the development of vision, some staff viewed the principal as the one with the vision. One designated leader, for example, spoke of her role as one of providing consistent, reliable support to the principal in an effort to help accomplish the principal's vision.

> A lot of those issues took a great deal of time, and that was at the very beginning when this happened, and still his role has been even just providing that vision. Where are we going now that we have this community, and it's evolving, and it's changing, and it's growing in numbers, and it continues to do so, I'd say he spends a lot of time mulling things over, and being the big picture kind of guy, and then he'll tell me all the things, and then I need to sort of try to work out all the details to try to get some of the things in motion. (SEC, P4, 239 – 244)

That the principals were viewed as being very influential in the development of vision for each twinned campus highlights the importance of communication strategies and participatory processes noted above. Principals felt that their efforts in this regard led to positive outcomes. One principal, for example, reflected on how a vision was beginning to take hold in his school:

> So there are true benefits and it is quite exciting, if you can take it to the next level. You need to have a lot of energy. You need to have a commitment and a true... you really need to have that vision of where you want to go with a campus, because they're all totally different. The next level is making this truly a cohesive campus in which there is a true flow of not just students, but of ideas, of resources, in which it's just natural. And that's slowly evolving. And the sharing of ideas, and that's working as well, too. And of course it's all for the number one benefit. I think we continue to lose sight of why we are here. We're here for one thing only, and that's student learning, student achievement. And sometimes we lose sight of that with this twinning. (TL, P2, 304 – 314)

For this principal, it was important that as the vision evolved, the focus on enhancing student learning and maximizing achievement not be lost in the complexities of the twinning. As this comment illustrates, he was also aware of the challenges associated with keeping such a focus:

> That's what I keep talking about, that next level. That of looking at student learning, because I really think you can have a wonderful impact. If you realize we have these kids for like an elementary to junior high school K to 9, you can make some changes. But trying to make sure that that gap isn't there because of our two separate facilities and getting that thinking on that linear line is going to be the challenge, and it still is. But they're working well together. (TL, P2, 421 – 428)

Principals noted that one of the challenges related to honoring the identity of each of the individual schools. One, for example, observed

> You can blend a lot of things together, but do they have to blend everything and do they have to lose their identity? And I think that's where a lot of people struggle. They say, "Well, I'm not giving up that, but I'll give up this." And another person will say, "Well, I'll give up this, but I won't give up that." (FG, P2, 762 – 768)

The challenge of arriving at a common vision increased when needs were distinct from one site to the next. Principals acknowledged this and noted that patience and planning were important elements in this process. They were also aware of the difficulty of addressing all the issues, particularly when the issues at each of the sites were very different. One principal described it this way:

> So it has been a slowly evolving process; a lot slower than I would hope. And it wouldn't be that slow if I was just over there working on it. And I'm working on something totally different here, which is assessment and reporting that way and how that impacts our achievement results in grade nine. So two totally different things that are needed. (TL, P2, 131 – 138)

In a similar situation, where the distinctions between the two schools were considerable the principal focused on team building. In his words:

> Does that mean doing it by yourself or working as a team? And because my intent is to continue to develop the team concept, that dialoguing across grade levels, with grade levels and teachers, is really going to be a necessary part of how we stick together. And so I guess it's a long story, but what it reveals to me is twinning, in my mind out of necessity, means that we have to find real ways

> to have dialogue going between the two campuses. (TL, P4, 505 – 512)

He found the dialogue more fruitful when it focused on the two sites' commonalties rather than their differences:

> I think there's been a good strong focus at both campuses on academic achievement and excellence. There's been a strong focus on both campuses for student recognition and quite a strong focus on community involvement and good citizenship and being part of the community beyond the school ... Those kinds of things. It has been kind of underway at both sites all along, so we've been able to pull those together. (TL, P5, 646 – 654)

By attending to commonalties, schools were able to agree on focus areas:

> We decided the key areas of need in our school would be literacy, athletics, second language learning and performing arts, because we felt that that criteria set the foundation for the rest of the things we're doing in our school. (FG, P1, 187 – 190)

After a time there was evidence of emerging identities unique to, and possible only in, twinned environments. Consider this principal's comment:

> It's evolved past that now to where people are feeling pride, because they're seeing results. And so people that might have been saying earlier on, you know, "Why are we doing this?" or "Yeah, we'll do it, because we have to do it and we're not going to complain too much, but I still don't really understand why, because we were doing fine before." ... And they're looking at it now as something that they're part of that's kind of a little bit evolutionary, and they're kind of saying, "This is kind of neat, you know." And they've gotten to know the people at the other campus. And strong teachers there, as well, and strong teachers here. (TL, P5, 509 – 520)

Another principal observed that once focused on their commonalties, staff became more collaborative, with "shared leadership" emerging:

> Generally everything here is just worked through and it's never like I'm coming down with that decision. We've worked through each issue. And we have people that just step up to bat and say, "You know, this needs to be done. I'll take care of that and work with these people on this issue." And they get others involved. And so that shared leadership thing is starting to happen, more

> naturally. We have to have less and less rules and less and less confines with this shared leadership approach. So more is getting done. (TL, P1, 366 – 373)

Principals discovered that with a common vision, values, rather than rules and regulations became the guide posts to decisions that affect behavior. One principal observed how this resulted in a stronger program as the two schools began to combine and share programs:

> We've placed four main areas that would be a support to our program, and that would first of all be athletics, because we believe daily phys. ed. helps kids to think and be involved in their educational process more actively. Secondly, the performing arts again is another base to this and second language learning, we implemented that this year from grades one to nine, and so kids are experiencing French at an early age, rather than at grade four getting into it and kids never really learn it. It becomes part of who we are. And then we put in an accelerated learning program here, also, where we play classical music all day long here in the classrooms and the halls. And then the kids are also involved in relaxation techniques at the beginning of each day and visualization techniques. (TL, P1, 202 – 215)

Epilogue

By the end of the first year, principals observed that a vision had taken hold. One commented:

> People have bought into the vision. They've bought into the team. They see themselves very much as part of it, and that's through building relationships, through me communicating, "You count." You know? "You have something to offer here." And it's refocusing a look at what their job is, refocusing a look at what my job is, and the traditional roles of what a teacher and what a principal are and other staff members. (TL, P1, 385 – 392)

And as this designated leader observed, the schools were stronger for having worked together in developing their visions:

> Our school has changed, no doubt, because of what's happened, but because I think everyone has been willing to come to the table and say, this is something that's new, but we're going to just give

> it our best shot, and we're here, and we'll back you, I think because people have come to it very honestly, I think that's why it's worked. We didn't have the nay sayers in the background waiting for it to fall apart or anything. I think people just accepted it. This is a reality. This is what's happening. Okay, let's make the best of it, and I think we've had something really exciting happen because of it. (SEC, P4, 566 – 576)

Chapter Summary

This chapter has presented four specific themes in describing the challenges of a change process and an orientation to the leadership challenges the principals faced. The first focused on the role of the principal and the adjustments and departures from traditional practice that were required. Being unable to be in both schools at once brought frustration and issues of fairness to the surface. The principals relied on their experience and their designated leaders for support through the adjustments. In meeting the challenges "head-on," new opportunities and solutions emerged. The following key points were made under the four main headings for the chapter:

The Role of the Principal

A number of factors influenced how the role of principal played out in each settings. Approaches to decision-making in the twinned environment were influenced by principal leadership styles and their experiences entering the project. These factors, combined with sensitivity to the needs of their school communities, determined how the twinning would be organized and implemented. Even given this, principals quickly learned that the traditional views of the principal as the hands on administrator must change. Leadership opportunities for designated leaders emerged as a direct result of this.

No precedent existed to guide these principals' decisions; they were left to their own resources. They appreciated the opportunity and willingly faced the challenges of the unknown. It was a growth opportunity for them.

Steps in Start Up – A Process of Change

This section began by providing a description of the schools involved in the project. It highlights three main areas that principals were faced with as they got the twinning underway. The first was the pronounced difference demographically between the schools. This was important to understanding why no specific approach could be centrally determined. Issues related to size, grade level and proximity all needed to be considered by the principals. The challenge of balancing time between sites and bringing the schools together with purpose was an ever-present and complex challenge.

District Support and the Dynamics of Working through Limitations

No one in the district had ever done this before. The principals faced challenges as they worked to adjust the role and expectations of the central services. These principals had no precedent to fall back on; unusual circumstances and untried solutions created frustration for principals in working through operational issues with central service departments. This new dynamic presented some limitations. The twinned schools were provided with some initial latitude related to reorganizing the instructional time to facilitate opportunities for regular, extended meeting times for staff. This turned out to be for one year only, which brought another at least perceived limitation to the forefront.

The district was not clear on the purpose of the twinning project, which created the challenge of self-reliance in the face of unknowns for the schools and the principals. This, in turn, accentuated the range of support for twinning and created challenge related to ensuring a clear, open communication plan. Was this project a step towards school closure, a means of saving money, an initiative in program planning? It was not clear. Principals experienced this lack of clarity as a limitation or constraint.

Vision for Twinning in the Hands of the School Leaders – "Designing the Map"

Principals recognized the importance of common purpose or vision. A number of approaches were described in this section as they addressed this challenge. Bringing two schools together under a united vision was difficult. Each principal adopted a unique approach. Issues related to acceptance of change, identity (of the single site), and common and different features, all played a part in the process. As the focus turned more to commonalties than differences, successes emerged as people came together.

Principals saw and experienced growth in achieving these successes and addressing the challenges. The next chapter focuses on the growth and the experiences of the principals and their staffs.

CHAPTER V

LEADERSHIP GROWTH

Principals of the twinned schools regularly reflected on their role as leaders and their work with others in the schools. This principal reflected on the unique situation he was in, his growth as a leader and the influence the twinning had brought to his school:

- We have seen so much growth. It is really, really unique. (TL, P1, 192)
- I've become much more of an assured leader. (TL, P1, 233)
- The twinning is causing us to come together. We've just had to re-look at the total way we function in this school. We've had to function differently. (TL, P1, 569 – 571)

Traditional roles and understandings of leadership were refined and re-defined. Principals learned, through practice, that flexibility and adaptability were required. Their co-leaders, both formal and informal, were involved in and affected by the changes.

Principals' Process of Reconciliation

This chapter examines growth in leadership as discoveries were made and challenges addressed. Principals were constantly having to reconcile their understandings of and experiences in their roles with the demands of twinning.

Redefining Roles and Facing New Demands

Principals and their staffs adjusted and faced the challenges of many "firsts" while operationalizing manageable plans. Speaking of the growth witnessed while in the role of curriculum coordinator in a twinned site, one participant observed:

> I would say that it continues to grow stronger, and I think that there's been a lot of success here, and I think people see a lot of the exciting things that are happening. There's a lot of positive energy happening here. If, at the beginning, they felt it was a huge shift in their thinking, or whatever, I think they're becoming more comfortable, and they're seeing sort of the fruits of the labour now. (SEC, P4, 543 – 549)

While a range of experiences was inevitable this designated leader sees changes that have resulted in "fruitful" growth.

Defining roles and understanding implications were ongoing processes. The principals faced a range of struggles and challenges as they ventured into largely unknown territory. In many instances, this unique situation presented barriers that required strategic solutions. One principal noted:

> When we talk about barriers, communication is one, for sure. Making sure that you have the right people with the right mindset going into it I think is crucial. (FG, P1, 432 – 434)

Development of honest and open communication systems throughout the school was seen by the principals as crucial to role definition and ensured people were directly involved in establishing new ways of working. This set the tone for relationship building and led to an atmosphere of shared purpose and partnership. Upon acceptance of an assistant principalship, a teacher described her/his commitment:

> When I met with my principal, I was very up-front and candid about all the concerns that I had, and because it happened that initially I was so up-front, and so confrontational with him, it really opened the doors for him and me to have a very good open working relationship. I let him know when I'm overloaded. I let him know when it's been a bad day. But also let him know when there's something really exciting going on. And I think it has to be that way to make this kind of a partnership work. (SEC, P5, 567 – 574)

Principals began to see the need to look at their roles differently. Partnership within the leadership team was seen as critical for this principal:

> As time goes on, I realize that I can't do it all; I do have to rely on some other people to do certain things. (TL, P3, 654 – 656)

There was a sense of an evolving process. Principals felt the uniqueness and newness of the assignment itself was a motivating and inspiring force. As one stated, "Just taking on an assignment that hasn't really been tried before, not in the way we're

doing it" (TL, P5, 441 – 442). This pioneering attitude helped develop a willingness to accept challenges and accomplish "firsts." One principal described his growing clarity:

> I think that each month and each week things have gotten clearer in my mind. And I think clearer in everyone's mind, because we're working through this all for the first time. (TL, P4, 194 – 197)

The traditional relationships in the school began to change. Physically, there were two facilities and the principal, in accepting a responsibility for both, had to have a presence in each. Achieving this presence needed to become a shared accomplishment. As one principal stated, "The principal is responsible for the vision and for putting it into motion, but if you tried doing it alone, you'd be toast in no time" (TL, P5, 192 – 193). As the attention to vision and the "big picture" fell to the principal, the role of the assistant principal was affected in terms of accepting new responsibilities also. This adjustment was characterized by one of the assistant principals:

> It was very interesting at the beginning because I think there were some people probably a little nervous, and I saw my principal's role in being an advocate for our school, and he had to really be visible, out in the public, really doing a lot of PR kind of work, having the tea and talk, and really being pro-active. (SEC, P4, 221 – 225)

These new demands required looking differently at the role of the principal. The experience, upon reflection, had its troubling moments. The ability to adjust to the changes and accept limitations was important. One principal noted:

> I don't know how I've changed. ... I don't think I've...I don't know if I'm giving the same amount of quality work to each of the building that I feel I'm capable of giving. I also begin to realize that I'm...As time goes on, I realize that I can't do it all; I do have to rely on some other people to do certain things. And I think I've changed too that I know now—definitely—that I can't please everybody. (TL, P3, 651 – 658)

The presence of new dimensions and challenges appealed to most. As leaders, they continued to experience change and growth. Another principal stated:

> You asked has it changed me? I really think it has. You know, I enjoyed—this is my fifth year here—and I enjoyed the first four years a lot. ...But I'm enjoying the additional challenge this year and I think it broadens the horizons a little bit. It tests you a little bit, because there's things coming at you that you haven't had to deal with before. And some of the challenges are beyond what you normally deal with. (TL, P5, 755 – 761)

For this principal, the "firsts" that were part of his assignment provided the appeal.

People and relationships were important as changes in the traditional "visibility" began to register within the school community. Realization of what was and was not possible in twinned schools became an important focus. One principal commented about the importance of relationships and the need to engage people differently. He spoke of parents and staff:

> What I'm trying to understand from parents is, what is it about that visibility that was so important that it seems to be essential? Because when I look at it, I think I'm more constructively engaged in dialogues with children through the round tables, more constructively engaged with staff in terms of professional development discussions at our staff meetings. And what I've tried to do in my communication with parents in school council meetings is to keep bringing out these elements, like this latest thing with the school-wide writing project, services projects that are happening at both schools. (TL, P4, 398 - 410)

The feelings and perceptions of staff members whose perspectives were grounded in the tradition of the single staff unit where the principal was a central, guiding, and serving contributor, was significant. One commented on the changing conditions:

> I don't think the connection between the staff and myself is the same, because the actual, the physical separation of leaving the building—and in their minds you've left the building. When you're in the building, but you're not in their classroom, you're in the building. There's that connection to you, that sense of security. (TL, P3, 663 – 668)

Where and how principals dealt with the time constraints came down to examining roles and relationships. They asked key questions related to roles. For example, one principal posed his question as follows:

> In terms of a system, I spend a fair amount of time deciding whether in fact—...I'm getting better at it, but initially it was deciding, "Is this an issue that I need to spend my time on or can it be deferred or handed off to someone else?" (TL, P4, 182 – 186)

Time, its use and availability, was a huge issue with which to contend; it shaped and dictated some of the changes required. Limitations related to time influenced decisions about leadership roles in the school. One principal, in a small school environment, used the example of extra-curricular life in the school to illustrate the changing role requirements. Moving between two sites meant involving others, and giving up traditional roles. He commented:

> You're there all the time. And then all of a sudden you have to give up a lot of that, because you just don't have the time to run as many clubs or to even teach now. ... And your role has changed completely, because you've established that. And now, if you want them to continue, the intramurals then have to be shared by more. You used the term "downloading," and there was, because you had to download some of those extra things that you as a principal could have the time to do if you were in one building. (FG, P2, 516 – 524)

Given the reality of time constraints, principals learned to be selective in deciding what they would be involved with. The redefining of roles had begun. One principal described how he became more deliberate about his involvement in light of the time constraints:

> And the thing that has forced the issue has been time. I don't have time to be phoning around and going off, tripping off and other things. We have to keep focused on the time issue, because I've got a certain amount of time here and then I've got to leave this and go to the other site ... And so ironically the twinning, the reorganization has

> forced me to be more reflective about what is really critical and not get involved in things that didn't really move us along on an issue. (TL, P4, 425 – 433)

In some cases, the demands inherent in the combined sites created seemingly insurmountable challenges that coloured the principals' view of their own effectiveness. They recognized limitations and expressed frustration. The ability to be active as an educational leader was limited by the lack of consistent time spent in one building. One principals shared his frustration this way:

> But I'm really feeling that I'm not showing a lot of impetus in either facility. I'm just trying to keep both facilities running as smoothly as possible, and I'm not seeing where I can challenge staff and have growth and be an educational leader. I just can't do it. (TL, P2, 81 – 85)

Setting Priorities and Responding to Needs

The principals described a "filtering system" of questioning that helped justify decisions and contribute to the role redefining processes. Making clear-cut and consistent decisions about which activities would actually have the principals' direct involvement and which would potentially involve others became a focus. One principal described his reflective process:

> When I stepped into the twinning project, I realized very quickly that I wouldn't be able to engage in those kinds of things and what I set up for myself was, I guess, a kind of filter of what are the really essential things that I need to be involved in and what are the things that I really can't do and need to either defer or bring someone in to do that particular job. (TL, P4, 81 – 86)

It was not just a matter of downloading or shifting jobs to someone else. Asking, "What is the critical work of the principal?" and "Is this something that can be shared appropriately?" helped shape the way leadership played out. It was more than a matter of semantics for one curriculum coordinator describing the new demands on the principal.

This designated leader described how responsibilities were assigned and roles were defined:

> It's certainly redefined it, and I think it's been really interesting for him to look at, as particularly where he was at a small school full time and then suddenly his job has doubled, and the time is decreased, and I know that he's really looking at what do you need to do, and what don't you need to do, so it's been sort of a defining time. So we've been really clear at the beginning, sort of setting boundaries of not downshifting. (SEC, P3, 65 – 70)

For students and parents, the concerns focused more on the loss of a principal. Their view, as described by one designated leader, highlights the difficulty. In her words:

> It's definitely a different view of the principal than it has been in the past. I don't think parents or students see the principal as a person who is running the school anymore. They rarely see the principal because he's in and out all the time. His job, now is more as a financial person to get the schools both on track financially. He's doing that kind of thing more than dealing with a lot of the students and the parents. He tries to do that as much as he can, but because of running back and forth in between the two places I think he finds that very difficult. (SEC, P2, 38 – 45)

The new demands on these principals created degrees of frustration and excitement at the same time. The specific needs of the individual twinned configurations influenced how priorities were set. One principal related the challenge to being a new principal to a school:

> How well do you think you'd establish yourself if you only spent half the time in that school when you're the new principal of that school? I mean, that was a challenge for all of us, to establish ourselves with parents and students and such. And there's a few things I needed to do over there, and that was number one: to get them to know me, to establish an easy atmosphere in the school, that I'd always had. (TL, P2, 350 – 356)

The twinned principals faced a huge challenge in meaningfully establishing themselves with the new staff, students, and community from each site.

On-going evaluation of strategies was required to develop a new understanding of the principals' roles. Complex situations required an alternative focus and simple answers and past practices were often not relevant. For one principal, the twinning experience facilitated ...

> having a better understanding of the role of my authority within the school, in that I tend to be a leader by consensus and getting everyone on side. And what I've found by the staff being at two locations and the incredible time it takes to build that kind of consensus—and I still believe that's important—but what I think I've had to do was to be more defined about my policy decisions and an example being we will no longer send children to the office for a time out. (TL, P4, 713 – 720)

Teachers could no longer expect the principal to be there to deal with all the discipline problems. In the twinning situation, it was very plausible that when a student was sent to the office, no one but perhaps the secretary would be there. For this principal, the issue was one of safety. He exercised his authority and departed from the consensus approach that was his preferred style. He made a clear authoritative decision, yet allowed alternative solutions to emerge by encouraging teachers to work together. He noted:

> What happened is the spin-off discussions about how are we going to handle those things and what are we going to do. And right away everybody in a sense sort of self-organized and said, "Well, we're going to handle it this way. And we're going to do this and this and this." And it hasn't been an issue. (TL, P4, 730 – 735)

This illustrated a departure from the hands-on approach to being the principal in the school, interacting and being visibly involved with all students, parents, and staff at all times. As described earlier, there was an important challenge for principals to redefine visibility and engage in high leverage activities that supported the vision and goals of the school. This went hand in hand with teachers sharing some of the more traditional principalship roles. Discipline practices offer an example of this shifting responsibility and role changes to address school needs. One principal noted:

> The jobs can be looked after, because other people can assume some of the responsibilities. Teachers can take on a greater role for looking after the responsibilities for discipline and basic decision making. But the question can still evolve back. I mean, they still want a principal, even if it's just somebody who pokes their nose in the door and says, "How's everybody doing today?" and "Good to see you," and you know, they like that presence of the person who's in charge of the total operation. (FG, P2, 545 – 553)

There was an ongoing challenge of redefining the principal's role so that his visibility and presence could be maintained within both sites, based on need. Issues related to the quality and nature of the involvement and visibility rather than just the quantity of time became a focus. Perceptions were not always the same. One principal observed:

> The argument presented to me was that I'm becoming more of a "business manager," because I have to take care of business. And I'm actually finding that I now have more time to really concentrate on the educational issues that we're dealing with in the school. (TL, P4, 333 – 338)

This principal was very concerned with developing his own understanding of the role. He was discovering that visibility was not the essential issue. He credited his growing understanding to being available and open to one-on-one discussion. He described his discoveries:

> I'm left with thinking that that wasn't really an essential element of my job, or shouldn't be an essential element of the job of a principal. That being there is somehow good enough. I think it's more important to be talking about what am I doing when I'm here, and what kinds of conversations are we having. And I think I'm changing a few minds that way, but it's a very slow process and it's done more one-on-one than any kind of formal meeting, ... But I really believe it's working well, that I think we're getting to more essentials than perhaps I was engaged in the past. (TL, P4, 415 – 421)

Reflection and careful study of the situation were very important aspects of decision-making and establishing ways of working. Even though there was a strong edge of uncertainty in determining what would and would not work, it was important to establish common direction for their school community. They exercised authority in making decisions to initially change behaviors. One principal rationalized this as follows:

> For me and my authority it's being really cognizant that sometimes those statements of, "We will do it this way," are really important in getting everybody moving in that direction. The beliefs in that will come later, as Tom Duskey says, that by changing behaviour first, we can then change attitudes and beliefs afterwards in increments. That's what I've found has been more important and I've done that. (TL, P4, 739 – 743)

In summary, twinning placed demands on the principals to make adjustments in how leadership was carried out. The adjustments were complex and involved changing roles on staff and addressing traditional perceptions of parents. Principals set priorities and acutely examined what was possible and what was not. They developed "filtering systems" and questioned their involvement in accomplishing this. As the principals worked to identify the "essentials" about their roles, it was important to monitor and support the adjustments staff and parents needed to be part of. The twinning brought many perceptions of leadership to the surface that needed to be addressed. Emphasizing team was important at all of the sites; this is the focus in the following section.

Redesigning the Formal Leadership Team

A common element of the twinned schools' operational plans was a high degree of reliance on formal leadership roles within each school. The designated roles of assistant principal and curriculum coordinator served as "substitutes" for the principals'. This provided the administrative support closer to what teachers were accustomed to and expected from the principal or from the office. The following section examines the emerging roles and redesigned responsibilities of the designated leaders in the school.

Designating Leaders

A significant number of daily management tasks and issues became the responsibility of a designated leader in each school. This leadership position was provided through a part-time designation in all but the high school setting, where the position became full-time by mid-year. In one example, the principal introduced a curriculum coordinator designation in each school but, because of a budget deficit, assigned no release time. By mid-year, resources were found and release time was provided. He explained:

> We needed to have somebody that didn't have any classroom responsibilities for some part of the day that teachers could go to, that parents could call, that the secretary could bounce things off of. So after Christmas we did some shuffling in teaching and brought some extra teachers in and released the curriculum coordinators. It made a tremendous difference. (TL, P3, 93 – 98)

This need for coverage was further illustrated in another setting as the demands of the substitute leadership role became clear. Teaching assignments were removed to allow a more singular focus for the designated leader. She/he commented:

> I thought I could handle that, and fairly quickly found out that it was just ridiculous. There was just no way that you can take on an administrative position, be a representative for, or to the principal of an administrative team, and still be in the classroom. (SEC, P5, 494 – 497)

Delegating authority created autonomy and encouraged independent decision-making within the predetermined boundaries of the designate role. Principals used a variety of team approaches in defining roles and organizing "team" responsibilities. One principal described his process:

> I think that working together with the curriculum coordinators and initially starting out trying to get some kind of leadership team, so if you had a curriculum coordinator in each building and then a lead teacher that would be there in case both of us were not in the building at

> the same time, ...Setting up some of the sequencing that would take place and the hierarchy of who had responsibility at certain times when people were there or not, and that's been really interesting. (FG, P1, 166 – 174)

Principals recognized that they could not do it all themselves and shared the workload with the formalized leadership team at the school. In doing so, principals needed to learn to step back and accept the work of the team. This was particularly true in the small school setting. One principal described the change for him:

> From being in a single school administration, where you're always there to be able to handle every situation, always available for students, staff, parents, to now having to turn that over to someone and living with their sort of decisions, at times you had to really bite your hand, because it's not what you would have done. But if you stick your face into everything that's going on, you're going to be working a 25-hour day. So I guess for myself the growth is being able to step back and live with the consequences that your lead team has come up with. (FG, P1, 212 – 217)

Trusting and accepting the actions and decisions of designated leaders allowed the principal to involve them effectively. One principal summarized the changes to the leadership team as the substitute role notion was adopted:

> The only way you could do it was by having an administrator in both facilities when I'm not there. And I have a wonderful curriculum coordinator at one site. And I have the assistant principal at the other, who has really evolved this year. ... taking on the challenge of being a relief administrator when I'm not here. (TL, P2, 75 – 80)

The developing concept of a "relief administrator" took shape at each site. There were opportunities for aspiring leaders to gain meaningful experience in a number of ways. They provided coverage, security, and support for students and staff on site in the absence of the principal. One principal described the importance of this "relief" role:

> Well, other than the time that I'm out of building, then the curriculum coordinator is basically the principal in charge and they look after discipline, they look after setting up and organizing the staff meetings once a month for their school,

> they look after some of the parent complaints that come in. (TL, P3, 345 – 349)

Some staffs experienced an initial phase of resistance to the additional authority assigned to the designated "relief administrator." Principals needed to be aware of, and patient with the dynamics involved in the changes in roles in each situation. For example, one principal described how acceptance emerged:

> I don't know if there was a great deal of resentment that they were given that position, but soon the staff became reliant on them and gave them the respect that they needed to have when I wasn't in the building. So they would automatically turn to them. At the beginning of the year, they didn't. They always waited for me to come in through the door, and I was besieged by this flood of people. They all wanted to talk to me instantly. As the year went on, that wasn't happening as much. So it's changed. (FG, P2, 115 – 122)

Mentoring the Novice

As described above, the twinning resulted in a number of leadership opportunities that otherwise would not have occurred. Novice administrators had opportunities to work in an initial leadership role and experience challenges in a supportive, growth oriented environment. For example, one designated leader comments on a particular challenge:

> There's always the challenge with being a young administrator. There's a challenge dealing with, you know, a person who has taught in your school, and only your school for 25 years, who has always done things one particular way, has gone through 5 to 6 principals, if not more, that have been on the verge of retiring, have their own leadership styles, and all of a sudden I come in and I want to start making changes, or I start telling them what's acceptable and what's not acceptable. That's, it's a difficult thing to do, but that isn't because of the twinning issue, that's because of the leadership issue. (SEC, P5, 843 – 851)

The supportive environment included ongoing advice, assistance, and insight provided by the principal. Principals encouraged these new leaders to trust their instincts and act with confidence. One designate commented on what this meant for her/him:

> Right from the beginning my principal has said to me that, you know, it may seem trivial, but if there's a trivial solution to it, then it's important we deal with it, and take care of all those little things. So, a lot of times the support will come, you know, if a staff member is concerned about something they'll come to me, and I will put forth a suggestion to the admin team on how we deal with it. Sometimes it's the kind of stuff that I can make a decision on or do some investigative work before I come to him and the administrative team and say, this is what I've got, how do you feel about me going this way? (SEC, P5, 452 – 460)

The principals provided training and opportunities by involving designates as widely as possible. One curriculum coordinator summarized her role:

> Well, the principal involves me in all the budget stuff we're involved in, giving our input in all of that. Basically being here for the staff if there's a problem that arises between staff and students and parents, then I'm here, so basically that's it. (SEC, P2, 29 – 31)

They easily established trusting relationships with teachers on staff. "They work really well. Because they are colleagues, they provide a lot of support for teachers" (TL. P4, 539 – 540). They provided a range of valued support.

One designated leader described how the relationship with the principal led to positive and purposeful relationships with teachers. She commented on growing more confident with decision-making:

> We talk a lot, and I'm sure with time, especially when I become a little bit more black and white as far as how issues should be dealt with, and less waffling is going on on my behalf, there may be a larger black line drawn between my role as a leader and the teachers as a staff. But it's been very, it's been very good working with them, and taking on this kind of a role. (SEC, P5, 839 – 843)

Within the parameters of this project, these designated leaders experienced significant changes in their roles and daily involvement in the school. They gained from

the experience, yet some expressed that they missed elements of their former classroom roles. One principal expresses awareness and understanding of this struggle:

> They were at times torn, because they were giving up their classrooms to be able to go in and do some of that stuff. And at the same time, they really enjoyed doing the curriculum coordinator stuff, so they were just growing and developing into that position, but I think they really enjoyed the challenge that they were given. (FG, P2, 108 – 113)

Principals and their designates benefited from staying updated and informed of each other's activities on a regular basis. This was accomplished through informal sharing and regular scheduled meetings. One principal described the importance of interacting as a team of leaders:

> Going back to other things that I've had to operationalize, through bringing in curriculum coordinators at each school I meet with them regularly, almost daily. And we catch up on events of the day, upcoming events, certain issues that may arise, and then we talk about who will be taking what responsibility in that particular issue and what's the best solution for doing that. So I've found that actually to be way more helpful, now that I have two or three minds working together on certain issues, as opposed to one. (TL, P4, 119 – 125)

The regular exchange of ideas with the principal served to maximize their ability to develop effective plans to address and provide support to a range of needs and problems. For example, one principal described his approach:

> In terms of some of the curriculum support, ideas, strategies; quite often I will have conversations, you know, I will talk with the curriculum coordinators and say, you know, they'll bring up an issue and we will talk about it, and think about what strategies might be working. And so then we in fact lay out another strategy of how we're going to approach it and what might be constructive things to do. (TL, P4, 447 – 453)

Self-confidence grew as a result of the trust that principals gave to the designates as part of mentoring. It took confidence to act on decisions before checking with the principal. One designate described how decision-making was a central part of the role:

> I rely a lot on my principal. I communicate through him, and if there's decisions I feel uncomfortable making, I have to use my instincts in deciding whether this is a decision that he would want to be a part of. And it's worked out pretty well so far. I haven't had my fingers slapped too many times that I can remember. But that might just be because he's the kind person that he is. (SEC, P5, 433 – 438)

The level of trust and confidence between the principal and the designated leaders needed to be high. This allowed complimentary leadership styles to develop along side each other. Differing, yet complimentary approaches to decision-making as part of the expanded leadership experience are described by one of the designated leaders. She/he said:

> We're very different decision makers, we have very different styles, he looks at ten sides of everything, and really takes his time to make decisions, and I look at three sides, maybe, and I'm fairly quick, and I tend not to change my mind after I make it, and since he still has seven sides in his head he can change his mind. So we're quite different in the decision making, and that's not usually a problem because we sort of have different areas in which we make decisions. (SEC, P3, 167 – 173)

Experience in formally designated leadership roles led to an understanding of what was involved in decision-making and running a school. It provided the designated leaders with new insight. One commented, "I think that's been an eye-opener for me this year. I mean, somehow as a teacher you magically think things just happen" (SEC, P6, 460 – 461).

As teachers, they make decisions about teaching and learning all the time. As a designate, the chance to follow school level decisions through to action provided valuable insights about leadership. As one designated leader confirmed:

> I have had the opportunity to make decisions more, but I have often made decisions in my head anyway. That is my job, that is what I do – and I have been able to follow through on some of those things. (SEC, P1, 353 – 356)

This level of involvement was a source of inspiration for some of the designated leaders, who felt excitement about the challenges of the role. One commented:

> It's been excellent for me at this stage of my career, you know, to be out of the classroom for part of the day to do some different things. I think that's been really good for me. I can only say positive things about the experience. There's nothing that has been negative. I mean, as I said, the only gut wrenching thing is whether I've made the right decisions. (SEC, P1, 428 – 433)

An important part of the principals' role in these situations was to assist in skill development and provide the opportunities for growth for their designated leaders. One curriculum coordinator expressed the importance of keeping each other informed in order to assure continuity:

> I will run things past him - - this is what I have done and how do you feel about that and we keep a communication book and I will – I decided we should publish it – there is some interesting stuff in here – What I have dealt with – just – so that we always know what has happened. He can come in and see what happened today, who I dealt with. So when the little fellow gets sent down again, he says, well, you were sent down here yesterday. (SEC, P1, 139 – 146)

Again, communication surfaced as important to leadership growth. When mentoring a novice, effective practice contributes to the support required for continued growth.

Developing a Team Concept

The establishment of roles and related duties of the formal leadership in the school was the first step in developing a team. Relationships were important as formal teams took shape and plans and approaches were established. The leadership team was defined, and roles and responsibilities were communicated with the whole staff. The principals met regularly with key people; the formal leaders and the administrative support staff. One noted:

> As a whole team we haven't met for several months, but at each school it's quite regular that I meet with the curriculum coordinator and the administrative assistants together. (TL, P4, 152 – 154)

Much of the required communication and decision-making was site specific; generally, the designated leadership roles were tied to either one site or the other. As the team became defined, contact, on site and between sites, developed. For example, in this case the two curriculum coordinators maintained an initial level of contact and discussion:

> At the beginning of the year we were getting together more and talking budget, and all of those kinds of things, but we get together once every two months, or so, and just sit down and talk about the things that are happening at their school, and the kind of things that she's doing as part of her CC job, and things that I'm doing. (SEC, P2, 515 – 519)

The team concept provided the opportunity to develop ideas and think them through before presenting them to the staff at large. Some twinning issues of crucial importance were dealt with in this manner. The manner in which discipline referrals to the office was handled developed through team sharing and deciding on workable solutions. One designated leader described their team interaction:

> We would have discussions about what's happening, and it was also our way of looking at some school level decisions, and before presenting it to the staff, sort of bouncing ideas off of each other, for instance the discipline policy within the junior high. It just so happened that three out of four of our lead team members teach in junior high. So they were able to bring a lot of their classroom experiences into, you know, the dialogue about the behaviour, and then shaping that policy, and that's where they came up with the three times, after the third time then we need that support. (SEC, P4, 168 – 174)

In this instance, the team began to move beyond the bounds of formal leadership roles and involve teachers more directly. As mentioned earlier, a safety issue arose when the administrative assistant (secretary) was the only one in the office. At this site,

teachers were directly involved in developing a process. The "lead team" worked with teachers and brought a workable plan to the principal, who was supportive and encouraged the idea. They implemented a three-step process where students spent time in other classrooms before being sent to the office. These teachers began to be concerned with issues outside their classroom. One principal saw this as a significant area of growth. He commented:

> I've worked very closely with our lead team members and it's been amazing to watch their growth, because they were all classroom teachers and now they are taking responsibility for certain areas in the school. And I certainly see them having greater ownership with what's going on, looking at a whole school perspective, instead of just what's happening in their own classroom. (FG, P2, 186 – 191)

Teacher Expertise – sharing it, applying it

Opportunities for teachers to share and collaborate developed as familiarity grew through the process of working together and developing relationships around changing roles. The principals focused on creating the conditions and establishing opportunities for staff to share their expertise and grow. The process of eliciting expertise and developing meaningful opportunities for sharing among the staff also influenced the role of the designated leaders who became initiators in some instances. One principal described teachers taking the leadership and collaborating with the designated leader:

> The curriculum coordinators often head or try to initiate other committees. Like, we were getting a fairly substantial sum of money from the Parent Association. And so they said, "Well, we'll give $3,000 to the school, earmarked for field trips." So it made immense sense to me that we should have a committee of teachers to get involved with deciding what are worthwhile curriculum-based things. And so with the curriculum coordinator and then the committee of teachers, they worked out what they thought would be really getting the best bang for the buck in that. And so they were involved in that process. I

> virtually had no, or very little, input into that. So it was basically decided by teachers. (TL, P4, 440 – 451)

In describing this experience, the principal noted initial hesitation on the part of the teachers to get involved. The example, noted above, hints at a subtle form of "resistance" that was present in these schools. In all cases, however, the initial struggle to get people involved in something they saw as outside their role or concern, proved to be worth it. Through such experiences, staff came to realize their ability to influence other situations and circumstances. One designate placed this in context:

> So that sort of surprised me, people were unwilling to take initial responsibilities, it's like they didn't want to, but then once they started, and they saw that it was going to go somewhere, then they would, then they'd play. (SEC, P3, 384 – 387)

They used their expertise and made decisions that mattered to them and their classrooms.

Discipline – adjusting strategy

An area of skill development that required considerable attention revolved around discipline issues. Understanding that the principal was less available, teachers became more self-reliant in dealing with classroom discipline than in past practice. One principal was very clear in this regard. He commented:

> And teachers have certainly had to take more on in the area of responsibility for discipline. That is no doubt a fact, and that's the best thing that's ever happened. We don't see kids coming to the office here. Teachers are dealing with those issues and other teachers are assisting each other to deal with those issues. (TL, P1, 238 – 243)

A curriculum coordinator, responsible for dealing with discipline at one site, was quick to comment about the teachers' effective involvement in this regard. This freed up time for the designate to work on larger projects related to curriculum and supporting the instructional processes in the classrooms. She described the shift:

> It started out that I would do the day-to-day discipline, but what's turned out to be quite a pleasant surprise in this

> school is that, first of all it's a fairly stable group of students, and we had minimal disruptive behaviour, and it's been really quite a pleasure, and teachers are quite skilled at handling it in their own classroom, and are quite willing to do that. So we made an agreement at the beginning of the year that rather than send children to the office we would exchange some for designated periods of time with other classroom teachers. (SEC, P3, 17 – 24)

In this example, like the one mentioned earlier, teachers developed specific steps to deal with classroom problems, supported each other, and were able to keep students in the learning environment by means of their support structure.

Teachers wanted to be confident that their needs were going to be met. Whether it was a discipline, resource, or program need, it was important that they were able to access timely and effective support with which they were comfortable. Each site, to a degree, had an investment in their identity; twinning represented a threat to this. One designated leader noted the importance of relationships and the confidence this provides through the change process:

> I think when there's a real concern with whether or not your needs are going to be looked after, it's vitally important to have somebody there dealing with you to convince you that they are. ... Without a doubt in my mind that's one of the reasons I was offered this leadership position. I had a relationship with those people, and I needed to let them know, and convince them that I knew what this program was about. I valued what programs we offered our kids and that I was going to continue to make that work. (SEC, P5, 603 – 610)

Confidence and trust in supportive relationships was, in turn, at the center of increased teacher involvement and support.

Reconciling Leadership and Changing Relationships

Principals could not be available and visible as the one "in charge" at all times due to the requirements of the twinning. Arriving at solutions required a process of discovery and adjustment and a focus on relationships. In the section that follows, the

changes in leadership demands are described. The reality of limited time and expanded responsibility is examined as the realities of twinning set in. The challenge of shifting to sharing these responsibilities meant dealing with the demands differently.

The issue of understanding support is addressed as an issue that needed to adjust as well. Given the change to less "hands-on" by principals, redesigning what support meant required a new perspective.

Working through Role Adjustments - Challenges

Sergiovanni (2000) provides a valuable way of looking at the administrative and leadership needs of a school. He confirms an important distinction, adapted from the work of Habermas, in describing the systemworld and the lifeworld concerns of a school. Systemworld deals with predictable elements of the operation; the systemic methods used to meet requirements and address details. In contrast, the lifeworld is concerned with the values and beliefs that drive the school and develop the vision and shared purpose; the "big picture" issues. The principals' struggle to meet the needs of the systemworld, in a manner that allowed them to focus on the lifeworld of their schools, has been described in the preceding pages.

Finding the balance for the "whole world" of the multiple campus school operating as one school was difficult. Time management presented a major challenge. A schedule set in stone that placed the principal at one given site at predictable times did not prove effective. This was confirmed by one principal, "What I realized is that you can't operate that way, because needs come up that just have to evolve" (TL, P2, 165 – 167). Initial plans to share time "equally" had to be revised as the demand to be available in each school changed as the year progressed. This caused some frustration and the need to have others in the school involved. One principal described his feelings:

> One of the negatives, though, is the guilt aspect that goes with it. And it's big, because you do have teachers, you do have parents and kids who come up to you, and you know

> you just can't do it all and you have to let other people do it, but you're still feeling that guilt. (FG, P1, 259 – 263)

One challenge for the principal was to let go and trust others. Otherwise, feelings of guilt led to self-doubt and the belief that the job was not being done properly. The principals, reacting to the "traditional" definition of their role, wanted to be all things to all people. As one of the principals expressed, the process of adjusting to the developing realities and growing possibilities allowed getting beyond this guilt:

> Like the time that I spent at one school, I just felt like I needed to be at the other a lot more. And then letting that go, and telling staff that I refuse to be guilty anymore. If I'm not there, I'm just not there. And that felt good, and staff understood that and so did parents and students. (FG, P1, 263 – 268)

Given the limitations related to being visible and available in the traditional sense described above, there was a shift to sharing leadership. With the principal's trust, others on staff were empowered to accept responsibilities while the principal focused on bringing people together. One principal described this as his most exciting experience in the twinning project:

> The most exciting for me is bringing the staff together and working with them on certain areas and making it a cohesive staff in which they like being together. At the very beginning one staff was okay with it; the other staff were really reticent and reluctant to do anything. And that has slowly changed. They're starting to see the benefits of it. (TL, P2, 282 – 287)

The principals' visibility took on a different dimension related to the change processes at the twinned campuses. They wanted to see and reinforce the positive aspects of the developing relationships. Being involved as directly as possible in teaching and learning seemed to be very important to some of the principals. The multiple demands created frustrations. This principal was unable to be as involved as he wanted to be. He commented:

> I'm just trying to keep both facilities running as smoothly as possible, and I'm not seeing where I can challenge staff and have growth and be an educational leader. I just can't do it. There's just not enough time. Time is probably secondary, but not enough being able to be in a facility on a regular basis in the classrooms to have impact and make some changes and make some suggestions in getting the staff on the same page. (TL, P2, 84 – 88)

The amount of time available in a day was seen as a limitation; there wasn't enough of it. Staying on top of it all presented an ever-present demand. This principal commented on the scarcity:

> And I do get in the classrooms every day, it's just that I'm not in there enough. I'm over here more in the junior high school, especially with two special programs. (TL, P2, 151 – 153)

Principals used a number of strategies to address their dilemma of not having enough time and energy to devote to all of the issues and initiatives they valued highly. Student celebration and recognition, for example, allowed principals to highlight their values related to teaching and learning. This principal was very deliberate in focusing on student successes and contributions in the school assembly setting. He described how recognition and rewards created common experiences and brought people together:

> Sometimes it's an improvement, sometimes it's achievement on a particular test or activity or project. And then again, that's a place for me to be visible and, on behalf of the teachers, I hand out the awards and we can applaud the children's efforts every week. And we've found that once that was instituted that that again helped on a number of fronts: one was my visibility with students, and it was also, in my belief, a very constructive way to give children attention and for them to be part of a whole group. (TL, P4, 112 – 119)

As principals struggled to come to terms with having to be less "hands on" and visible in addressing the needs of others, growth and learning became evident in the designated leaders in the schools. One describes the growth:

> That's part of being a leader, and part of experience is, you know, I feel myself between September and now coming across situations that if I would have dealt with in September I would have waffled on them a lot more than what I do currently. (SEC, P5, 303 – 308)

Awareness of limitations and disadvantages inherent in a dual site operation was also important. Supporting growth in leadership was in some ways limited by the geographic separation of principal and the designate for much of the time. This made consultation on the immediate "here and now" decisions difficult. Isolation was a concern because of the immediate decisions and actions leaders must take on a regular basis. For example:

> I find the leadership and the mentorship sometimes difficult to tap into, not because the invitation isn't there for me, but because of the physical plant. You know, if I had an incident that occurred right here and now, and I needed to deal with it, and I felt I needed some support to deal with it, you know, people are a phone call away, or a cell phone call away, or a pager number away, but it's still that time lapse, and that's a difficult thing. (SEC, P5, 103 – 106)

The designated leaders' confidence to act and be accepted, and the principals' developing understanding of how their roles were all required to change set the stage for the nature and meaning of support from administrators to be redefined. This is the topic of the next section.

Redefining Support

One of the major hurdles facing the principals was to ensure that the teaching staff received the support they required. The meaning of "support" needed to be examined closely in light of the principals' frequent absence. Teachers struggled with the adjustment. This designated leader had direct insight into these challenges and the related stress on teachers:

> We have a very strong staff, but I think the stress on the staff is a lot more this year than it has been in the past because when you have problem situations you don't

> always have somebody there immediately. I teach most of the time, so I can't be out of the classroom all the time unless it's a real emergency, so teachers have become stronger in their discipline. They've come up with different techniques and strategies to deal with their own discipline, but I think at the same time they're also becoming more stressed because they're dealing with that. (SEC, P2, 57 – 62)

These adjustments were made out of necessity but not without struggle. The more "traditional" staff members equated this lack of availability as a lack of support. One principal noted:

> Some of our more traditional people see support as, "You're keeping Johnny in for me." You know? "You're disciplining Johnny, you're doing this for me." (FG, P2, 216 – 218)

Principals began to see that everyone on staff had to "redefine" or change their expectations related to support from the principal. Continually coming to the rescue was not necessarily the best solution to all situations. Teachers had to accept full responsibility for building a learning environment in their own classrooms. Principals encouraged teachers to see the benefits of having meaningful and positive relationships in their classrooms. One principal described an exchange with teachers in this regard:

> If I do this for you, you're not building any respect amongst kids for you, parents for you, other teachers and team members for you. (FG, P2, 222 – 224)

Principals engaged in the on-going processes of meeting people and gathering information in order to understand and act on the needs of the school and its community. This "dialogue" helped identify the needs required to maintain a supportive environment. One principal described his actions:

> First of all what I did was I believed that we needed a lot of support things in place for people and we took a look at the needs for both communities and dialogued about that with parents and teachers. (TL, P1, 158 – 161)

In a number of instances, the principals clearly articulated how they viewed their challenge. One principal looked at support this way: "As your administrator, it's my job to be sure that you've got the tools you need to do the job in the most effective way with equality" (FG, P1, 525 – 528).

After an initial orientation and observation period, principals made specific decisions that benefited teachers and provided support. For example, one principal described decisions that helped establish a feeling of being supported:

> One thing that I did, and that was right after Christmas, was I hired my lunchtime aides here for an extra 15 minutes, so no teachers over there—I mean, they rotate through supervising their lunch hours, because they only had a couple lunch aides—now none of them have to supervise. I have enough lunch aides so they all can sit down and have lunch at lunchtime. Just the little things; putting all computers on their desks. I think that I've established myself with them that, yes, I'm looking out for them and I am there for them. (TL, P2, 370 – 378)

It was important for each principal to understand the challenges brought about by the changes of twinning from a staff perspective. One principal, through his "lead team," communicated his role in providing support:

> When there's change, people struggle with change. And again, in talking to the team and dialoguing, you know, I told them it's my job to provide them with the tools and assist you and support you and all that. (FG, P2, 567 - 570)

One principal shared his belief that support in this environment of change revolved around communicating the vision and purpose of the school and being available to work with parents as an advocate for the work happening in the school. He commented:

> One of the things I'm going to do in support is I'm going to make myself available to parents and make sure that in my scheduling of time that there's an availability to dialogue with parents daily, whether that be problem parents, so that I can be proactive in assisting you with situations that

> occur, I helping them get on stream with the vision or whatever. And I think that that has been one of the most strong things that we have done and spoken to that has got parents on line with us. (FG, P2, 571 – 579)

In this example the support extended beyond the school, out to the parent community. This translated into support for teachers as well.

Relationships and Challenges – the Role of Professional Development

The principals used a variety of approaches to develop relationships between staff members. Each school established a plan for professional development, taking advantage of the flexibility and latitude the district extended in the first year of twinning. The planned activities that resulted had benefit regardless of, and beyond, the content focus. For example, one principal noted the importance of bringing staff together:

> They really enjoyed the interaction. It helped set up the campus feeling. And the professional development, the content of the professional development, I don't...I mean, it was important, but that wasn't crucial. The critical part was getting that campus mood. And I think that that was one of the most important things that we did professionally. (FG, P1, 33 – 38)

The principal deliberately created a structure to encourage interaction between staffs as they focused on issues of common concern. Another principal focused on the newly implemented Teaching Quality Standards to establish common ground for joint staff meetings. He described how this brought the staff groups together:

> I also found that a thing that worked reasonably well was that we had the joint staff meetings and they were pretty much set. And the joint staff meetings were more along the lines of professional development and I think that made it a little bit easier for the staff to get together, because they were grouped to... intermingle and that forced them to talk about some issues that they felt very comfortable with. (FG, P1, 75 – 81)

Initial activities established a tone and helped set expectations for continued work. Outside resources were brought in to assist with professional development activities.

One principal used an outside presenter for their first professional development day. He described a positive start to the forming of relationships:

> We did a corporate team-building PD in early September that really brought the staff together. We could just get to know everybody and really break the ice. And for a lot of them the first time they were meeting was in August. (FG, P1, 49 – 53)

Principals encouraged and facilitated teachers to look at programming by introducing external resources and common approaches to meeting student needs. One principal facilitated a reflective process that led to a redesign of program:

> That's where Solution-Based Counseling has helped us. But we also realized that program-wise, we had this program that we thought was pretty good, but it was missing some underlying supports to the program, so we went back and we redesigned our programming. (TL, P1, 198 – 202)

The additional professional development time also provided for opportunities to do some joint problem solving. Discussions that addressed issues on one site, but involved both staffs, provided a constructive "in house" resource. Speaking of the additional opportunities to be together, one principal described the benefits of working together:

> We had the early day every week, and that was really crucial in bringing the staff together. We combined staff for every situation, all staff meetings. Everything was very much one staff and we attribute that to having that time to pose one school's problems to the next school. (FG, P1, 44 – 46)

These times each week also provided individual and team time where a range of needs could be addressed; purposeful dialogue occurred. One principal commented:

> We've been able to use our Thursday dismissal times quite effectively in terms of professional development and support there. And by giving time for cooperative planning, individual planning a couple of Thursdays a

> month, that was seen as really helpful and a constructive thing. (TL, P4, 629 – 633)

Exchanges between schools were facilitated and encouraged, through these common opportunities. Teachers began to recognize the value in the cross site sharing and began to initiate contacts on their own. One principal observed:

> And they're now working closer together and finding out that this isn't just a one-way street. There's actually some good expertise over there. And so we've got some whole classes coming here, we've got some whole classes going there because of some of the things they've developed. So it's now becoming, regarded fairly positively. (TL, P5, 524 – 530)

Principals understood that the balance between internal and external expertise was important. An outside facilitator was helpful in addressing some of the changing needs of the school and the staff. One principal described the need to address the concept of shared leadership:

> I think there needs to be lots of dialogue. Talking about who we are and what we want to become and how we will all function, that's the beginning of developing some relationships and communicating about shared leadership. And I think then bringing in somebody—and I don't always think it's the best to bring some "specialist" in—but bring someone in or do some inservicing on shared leadership styles and how we could perform together and what does responsibility mean. To build some of that. (FG, P1, 531 – 534)

Some specifically chosen strategies and opportunities used to bring people together in a professionally focused manner had a positive impact on "team members" accepting shared leadership. In the eyes of one of the principals, the twinned setting contributed to success in this regard. He described how "study groups" facilitated this growth at his school:

> Well, through these study groups to the use of many of the things that we're working on together, there definitely has been growth, and I'll back up and sort of show some of that

> growth. We've had team members that would be maybe more traditional- minded. I think that's always the hardest part when you're moving to a shared leadership approach, which I think twinning brings about naturally. (TL, P1, 289 – 295)

Principals took full advantage of the enhanced professional development opportunities. They focused on relationship building across campus as an important initial step. Once again, the importance of establishing common ground was highlighted as need and bringing in external resources supported the growth in a number of instances. The growth led to further needs related to role definition. Principals had to accept differences in approach as more "leaders" became involved.

Delegation and Empowerment

As indicated to this point, a variety of approaches were used to bring people together and establish a common professional focus. Principals adopted a critical and reflective process that involved ongoing and thorough examination of their roles. They had to find and develop alternatives to their traditional "hands on" approach. Decisions delineating which activities the principal could and could not be involved in began to emerge. Principals needed to accept the possibility of a different approach when giving a task or responsibility to others.

Ongoing reflection helped principals to understand their past practice related to involving others in leadership activities. They developed an increased awareness and understanding of their own personal growth. Now that they needed to allow others the experience of leading they saw the need to change their approach. One principal described this as an important change in himself:

> I thought that I used to delegate. And what I've found is I delegated some of the process, some of the actions, but I still retained some of the responsibility and I was still doing some hands-on things - one of the big changes. (FG, P1, 272 – 275)

Principals evaluated and examined their own roles as twinning placed them in a position of needing to help others develop leadership skills. School and individual growth was directly enhanced when the principal "let go" and took a minimal role. One principal commented:

> Up to this point in time in my career as a principal, I was very hands-on. And that was not always to the benefit of the school or to my staff, who wanted to demonstrate leadership. I've had to let go of that a lot and delegate. I was always good at delegating, but I was always behind the scenes watching to see if it was going to work or not, just because I needed to. My type of personality. (TL, P2, 196 – 202)

As noted earlier, a stated goal at most sites emphasized service and effective response. Trust and positive relationships contributed to success in this area and applied, as well, to support staff groups in the schools. One principal commented:

> Being able to confidently delegate some of those tasks to my head custodians, for example. I'm really not that concerned about service requests and those kinds of issues. I'm confident in their ability that if we're ordering something or if we have to get work done, it's because we really have to do it. (TL, P4, 345 – 349)

Setting A Tone

Acting on this trust and accepting the risks required confidence and a high level of efficacy. Principals openly admitted to their staffs that they did not have all the answers and that the possibility of making mistakes was real. This admission set a tone and gave a signal that teamwork was to be the norm. One principal described his initial message to staff:

> From the beginning I said to all of our staff group, the whole group, that I don't have all of the answers and really that I'm counting on everyone working together to come up with solutions to issues as they arise. (TL, P4, 218 – 221)

Principals regularly let teachers know they were leaders. As one principal put it, "I tell each teacher they're a leader here. Constantly" (TL, P1, 697). This form of mentoring and ongoing encouragement characterized the principals' move toward empowerment as they saw initiatives emerge from teachers. One principal described how dialoguing allowed a new notion of support to happen:

> Assisting team members with developing, with changing their mindsets from delegation to, you know, being empowered. And I think that's all in how I mentor, how I dialogue with the staff and how I allow them to be empowered and take the project away or take whatever they're doing away and then provide the support so that it can happen. (FG, P1, 299 – 304)

Principals experienced growth in distinguishing between "empower" and "delegate." As they created opportunity for meaningful involvement, they learned to empower others. One commented on this change:

> One of the biggest things that has affected me is the area of empowerment. It's learning to empower others. It's interesting that the word "delegation" should be brought up. One of the things that we've come to this year is that — Staff can look at things as delegation or they can look at it as something they can take and do as being empowered to do. (FG, P1, 279 – 286)

Principals recognized the challenge and skill involved in making this distinction real for teachers. They looked at the need for sharing leadership to encourage and motivate involvement in others. One commented:

> So it's been looking at that whole process, as to how I motivate others to become involved and encouraged. And again that's kind of a shared leadership aspect I guess. (FG, P1, 286 – 289)

A team approach, with a focus on student learning was encouraged by principals as a strategy to achieve broader authentic and empowered participation. It helped

teachers become decision-makers and leaders in regards to the needs of their students. One designated leader described the evolution:

> In our conference room it's quite common to have seven or eight people sitting around the conference table where the principal and myself, and every single junior high teacher is there because we all have a part in that student's life. So, I think we've just really been building a team model here instead of that person feeling, oh, I'm stranded in my class, I have no help, I can't go to the principal because they're going to tell me go back and be empowered. (SEC, P4, 105 – 111)

The ability and willingness of assistant principals and curriculum coordinators to accept expanded responsibility and commitment in their roles as leaders contributed to this team model. Assistant principals were empowered and took leadership over in part, or in entirety, related to specific demands. They had responsibility for such areas as discipline, transportation issues, special needs programming, parent issues, coordination of student assemblies, and lunch programs. As one designated leader expressed:

> Some of my roles and responsibilities, I certainly handle a large part of the student discipline, that seems to be quite common with a lot of assistants, discipline issues. I handle all of our transportation issues as well, and I certainly look at also special needs coding, facilitating that, setting up, coordinating, you know, the IPP's and making sure that's all happening. (SEC, P4, 9 – 14)

Another assistant principal expressed the breadth of the role responsibility, yet also articulated the importance of the principal's role. She described this satellite role:

> I find that I tend to dabble in all of the jobs and responsibilities that the three assistant principals at our other site take on as individuals as key projects, but mine are on a much smaller scale. So in that way I feel my role is sometimes more along the line of a principal, and yet not having the full decision making power that a principal does. And quite frankly, I'm pleased with that at this point in time. (SEC, P6, 19 – 24)

Communication and Tracking

As teams developed and responsibilities shifted, effective communication systems again were identified as an important focus, especially when critical actions and decisions were taken within a team. One principal learned the importance of staying informed as he delegated:

> So it kind of taught me yes, you can delegate, but you'd better make certain that you have some idea that you're being informed after you do the delegation. And that was a real eye opener for me. That's one of the things I'll definitely take with me wherever I go from now on. (FG, P1, 349 – 353)

Sharing operational decisions and ongoing responsibility for school management demanded diligence, constant evaluation, and effective communication. This was supported and confirmed in a reflective statement by one of the participating principals. He recognized the ongoing need to work at keeping everyone informed:

> I guess at the end of the first year when I look back at where our successes are and the areas that probably need greater attention, the one area of all of them that is the absolute key is communication. And you know, with a large enterprise communication is a challenge, but when you add to that the dimension of another campus and you think it's not that great a span, but it is huge in terms of keeping everybody in the loop. So that's one that we have to continue to work at. (FG, P1, 361 – 367)

Emerging Reciprocity

As operational elements in the twinned schools took shape and the sharing of leadership responsibilities was extended and formalized, new understandings of what it meant to work purposefully began to emerge. Lambert (2000) describes constructivist leadership as "reciprocal processes that enable participants in a community to construct meanings that lead to a shared purpose of schooling" (p. 3). Reciprocal action was encouraged and facilitated at the student and teacher levels; new experiences in the learning environment were introduced. One principal described an exchange:

> We use our phys. ed. leadership people over there to help run activities, and they had a science experiment that the grade two teacher was going to run. She couldn't get any parents: they were all sick. I happened to be over there in the morning, and she said, "Well, we're going to have to cancel: there are problems." It was a Tuesday afternoon. We sent over 4 grade nine reliable students. It worked beautifully. (TL, P2, 287 – 293)

In the above example students connecting with students for a mutually beneficial exchange was facilitated. This principal presented a further example of meaningful and supportive involvement:

> The paired reading that we're now using across here with our grade nine language arts students and the grade two kids is really working well (TL, P2, 295 – 297)

The purpose and mission of the lead team contributed to selfless acts where vision and commitment were more important than the individual. One principal described changes that were implemented from within the team:

> Now, next year we're going to look different, because these team members have come to me and said, "You know what? We need to equalize this thing." A member says, "I'm a curriculum coordinator." You know, we're thinking of making assistant department heads out of people. He says, "I would like to step down and become an assistant department head. I see these people pulling their weight and doing all these things: I want to equalize this thing." So he has volunteered to step back on that one. And everyone will get a designation as an assistant department head on this team. (TL, P1, 506 – 515)

The understanding of reciprocity and the related support built the capacity for shared leadership to grow out of practice. This was the most challenging work to engage principals as they reflected on their leadership. One commented:

> We started to dialogue and revolutionize who we were as people first of all, and reading books, and trying to find some schema to the whole thing. And I think the hardest thing for me is I think I've always been what I thought was a shared leadership person, and as I read and understood, I

> think I saw the capabilities in me more so than really actually having performed there all the way. (FG, P2, 200 – 205)

As this section describes, principals needed to develop a shared leadership approach in the twinned settings. This was challenging and took shape differently at each site. As the following section will illustrate, it was not a linear process.

Principals expressed a growing understanding of the demands of leadership in the complex environment created by twinning. They required the insight and ability to determine, based on circumstances and demands, what action was called for on their part. The movement to a shared leadership model was not always possible or even appropriate. At times, setting direction and maintaining the needs of the "systemworld" required an autocratic approach to decision-making. One principal presents this as advice to new principals stepping into the twinning project:

> There's times that we need to be up in that first quadrant, you know, that is very directive, to steer people back on track. New principals in a twinning situation it's going to be having the adaptability, flexibility and forethought as to when am I going to be very directive and when am I going to build this shared leadership. (FG, P2, 276 – 282)

A grasp of the larger picture and long term objectives became important. Commitment and a growing sense of confidence, reflected in the energy and expression of the participating principals, spoke of promise for ongoing success. One principal positively expressed the potential:

> Hopefully, I've conveyed that it's been an exciting project and I'm still very much engaged and see it as a very plausible, effective way of handling small schools and keeping them viable with this kind of administrative structure. And I think for me it's been a good thing. And I think ultimately it's been good for the kids. (TL, P4 750 – 755)

Chapter Summary

This chapter has examined the growth in leadership experienced by principals and staffs of the twinned project schools. It described some of the adjustments the principals, designated leadership staff, and teachers lived through as a result. It described leadership growth within the context of an ongoing process of reconciling, adjusting, and redesigning. The growth was complex and evident in many of the circumstances, reflections, and actions described by the participants in this research.

The twinning project put leaders in the position of needing to change and find ways to meet new leadership challenges. Actions that led to growth can be seen as elements of a process of reconciling and dealing with the changes while managing and operating the schools. Circumstances were varied and principals' styles influenced how adjustments were experienced and changes were made. The commitment and resolve of the principals, as primary leaders, had a positive effect on others involved, and revealed potential for further growth. One principal characterized the process:

> Once the changes were put in place and we started to see growth, we realized there's other areas that we need to change in and grow. So it's been just a natural stimulating process.(TL, P1, 536)

There are many examples where successes increased the efficacy of the principals and/or designated leaders to continue the challenge, set expectations high, and build on the experiences. They acknowledged the growth in themselves. One commented:

> I truly do believe that the growth that I've had professionally as a principal has made me realize that, yes, a lot of this is really difficult, but I can do it. And I think I've demonstrated that to myself. (TL, P2, 570 – 573)

To recognize the growth in self and others required an ongoing desire, commitment, and ability to reconcile and come to terms with the changes in leadership roles and relationships. It meant challenging practices and beliefs and adjusting to new

demands. Time was a limited resource and forced the acceptance of new models for leadership. Others needed to be part of activities traditionally associated with the principal's role. Ongoing reflection and dialogue involved others in problem solving as priorities changed. New responds to needs were found in a redefinition of what leadership meant.

Principals involved others in redesigning the way leadership demands would be addressed. Formal leadership teams emerged and became involved in decision making. Modeling and mentoring helped ownership to grow.

Principals created the conditions and established the opportunities for teachers to share expertise as a way of sharing leadership. Self-reliance was encouraged, and the meaning of support was redefined. The principals committed themselves to the process of reconciling role and responsibility with the redesigned model of leadership and facilitated this same reconciliation in others.

A shift to sharing leadership began. As the role dimensions of visibility, use of time, and supporting others began to change, leadership opportunities presented themselves in formal and informal ways. The connection between learning and leading equated to acceptance of change and the importance of positive, productive relationships.

Principals sought to identify common ground between sites as a basis for the building of relationships. Confidence grew as successes were experienced and meaningful connections emerged. Principals delegated as a management step to achieve effective operations. Involving others in these meaningful ways resulted in redefining roles and sharing leadership responsibilities.

Over-all, the sharing had a positive influence on the tone among staff and created positive experiences. The successes strengthened relationships as common commitments grew and trust developed. This growth, fostered by encouragement, facilitated a refinement where delegating became empowering and ownership became genuine

The developments here related to meaningful involvement and led to discoveries in sharing leadership. Models of formal and informal teams emerged with expanding responsibilities and purposeful work. The growth and accomplishment was shared among the team, so was the satisfaction. The "we" of the team is very evident in this principal's comments:

> So personal growth, and also personal satisfaction that you're doing a good job. I think just to see it evolve and to kind of feel as a group, "We've been able to do something here. We were given a challenge and we've taken it on and put some good effort into it, and we're seeing results." And I think at the end of the day we're going to be able to say to ourselves, "Good job!" (TL, P5, 768 – 774)

The growth in leadership, the sharing, and the changing roles made important demands on the principals. As one commented, "I've had to turn things over exclusively and then just let them unfold. And I think as a result I've become more patient" (FG, P1, 275 – 277). This principal recognized that in order to accomplish the leadership demands, tradition needed to be rewritten for the twinned schools. It was a process that needed time and patience to evolve. Ultimately, the goal of achieving an effectively operating twinned school appeared to be attained by creating the climate where leadership capacity had the opportunity to expand and contribute to a positive dynamic for the schools. Building leadership capacity is explored further in the following chapter.

CHAPTER VI

LEADERSHIP CAPACITY

This chapter focuses on describing and highlighting elements of the processes, approaches and strategies used to involve staff in meaningful leadership activities in the twinned schools. The term Leadership Capacity is defined by Lambert (1998) as "broad-based, skillful involvement in the work of leadership" (p. 3). Each of these twinned schools developed ways and means of coming together to build leadership capacity in unique ways shaped by their own circumstances, demographics and people. Models of shared leadership emerged as interpersonal interactions played out in efforts to address school needs.

> In a shared leadership team, there's lots of dialogue and input as to where you're going and what's going to happen. (FG, P2, 234 – 236)

The manner in which this dialogue and the involvement of staff was instituted and practiced and the way teamwork was emphasized varied among the schools. Although differing in leadership styles, the principals all focused on maximizing opportunities for involvement and on identifying ways of bringing staff together. Each approach was unique and was based on the needs of the people and of the community being served.

Creating Opportunities

The reality of needing to look at leadership in schools differently was established early for the staffs in the twinned schools. The principals were faced with a change in role. Consequently, the role of the teachers and other staff members also needed to change. One thing that was common among all of the principals was the commitment to making it work. There were many challenges and many first time experiences related to immediate needs of daily operations as well as the long-term issues related to purpose and vision of the combined sites. One of the designated leaders expressed the realization that teachers were faced with change on a daily level.

> I think at the beginning that no one really knew what to expect. The principal's schedule was constantly changing so we didn't know when he was here, or when he wasn't. The staff took more in stride at that point, and then as the year went on we saw that we had to become more serious with the way that we were dealing with things, and we had to give our own consequences because there was nobody here to give those kinds of things. So I think at first it was like, well, you know, we'll just kind of let that one go by because nobody's here to deal with it. But as time went on we realized that there was nobody else who was going to do it. (SEC, P2, 237 – 245)

The daily reality of contending with the challenges of the classroom and student discipline required the teachers' attention in a manner not experienced prior to twinning. The redefining of roles that was needed created a new "familiar" role association that established teachers as decision-makers and leaders. This transition took time and varied in form.

The commitment to twinning meant making operational adjustments, while encouraging and expecting teachers to focus on relationships and the "bigger picture." For the principals this meant rising to the challenge of identifying the reasons and potential advantages for twinning and looking for collaborative opportunities that benefitted students. This presented a significant hurdle each principal had to overcome. Consider, for example, one designated leader's comment on factors impeding collaborative efforts:

> We don't really have anything in common other than those meetings we have had, the VP over there, (and again, our teaching assignment are very different) – ... we make a point of saying hi, you know, we will e-mail people and things like that. But no, there isn't much in common and they are over there and we don't have a common staff meeting other than those PD days so we don't really bump into each other in the hallways. (SEC, P1, 299 – 311)

The ongoing decisions related to overcoming this hurdle were influenced considerably by the initial decisions described earlier that principals made as to whether they would operate as a single school or as two separate sites or campuses.

As principals worked toward enhancing opportunities for involvement, they endeavoured to assure that teachers were engaged in meaningful activities. One designated leader who cautioned against sending "mixed messages" highlighted the importance of this:

> There's a constant struggle with trying to figure out, do we do this as one, or is this something that really is site specific that you do as two separate entities? And you have to be very careful when dealing with teachers that you aren't sending mixed messages to them, but I see in things like staff meetings, teachers sharing more with each other, and communicating more with each other. (SEC, P5, 399 – 404)

Focused discussion and communication were very important to the process of developing opportunities for involvement. This, combined with the commitment to maximizing the success of the project, brought new and challenging questions to the minds of the principals. A focus on professionalism as a common value presented opportunities to ask relevant questions of teachers. Given the differences between schools, the focus on professionalism provided one avenue to bring two distinct staff groups together with potential for articulating a common agenda. One principal, on reflection, deliberated on an important question.

> I think one of the pivotal questions or issues in my mind. How do we, how do I, continue to bring the staff groups with two sort of different sets, different cultural experiences, and in my mind anyway, different conceptions of what professionalism is, how do I bring that together. (TL, P4, 479 – 483)

This principal was reflecting on the challenges inherent in trying to bring together schools with different cultures. He saw the cultures differing, in particular, on the matter of professionalism. In efforts to address this difference, the principal facilitated school wide projects that brought a professional focus to light, creating enthusiasm, excitement, and an attention to the value of the common language for the classroom.

> We initiated ways of working both staffs together on school-wide projects that bring everyone's actions and focus in a single, more

> unified direction. I believe that by doing that, that the dialogue that's created between teachers and what happens in the classrooms, the children are engaged in similar dialogue. And that from year to year they would hear these words over and have these similar kinds of experiences and they can build on those experiences. I think that's one aspect that is particularly exciting for me. ...And I'm actually finding that I now have more time to really concentrate on the educational issues that we're dealing with in the school. (TL, P4, 325 – 338)

Principals chose to concentrate on educational issues such as professionalism in efforts to encourage growth in leadership capacity. The principal quoted above saw strength in the potential to build a common culture of learning for students over time. Principals shared this focus and turned to research and current literature in some cases, to support specific action and planning. One principal used Lambert's (1998) principles of shared leadership as a starting point to help articulate a unified direction for his school. An instructional focus emerged. He commented:

> I think just the thought of twinning caused us to really rethink our focus at our school and how we would put our vision into action. As a result, we talked a lot about what the principles of shared leadership are for us and what that would look like. And then we started to design something around the key areas of need in our school, and so after that we decided the key areas of need in our school would be literacy, athletics, second language learning and performing arts, because we felt that that criteria set the foundation for the rest of the things we're doing in our school. (FG, P1, 184 – 190)

Principals also worked with their formal leadership teams in efforts to create opportunities for meaningful involvement. Together they relayed the message that twinning could work if everyone made the commitment to make it work. They constantly built confidence through positive talk and clarified this agenda. One designated formal leader spoke of needing to be convinced by the principal, through frank exchanges and direct question – answer sessions:

> The answers that he was able to give me, he had to give me in a way that it convinced me so that I could go and relay that message

> to our staff, and continue to relay that message because relaying it once isn't going to help. You've got to live it, and breathe it, and walk it, and talk it, and he did that. He did that for me. (SEC, P5,685 – 689)

The designated leaders were encouraged to see the larger picture, to look beyond personal interests, individual assignments, and accept a broader, whole school, perspective. Through ongoing contact with staff members, they began to see and articulate a new view of what leadership could mean. Others on staff turned to them for support and confirmation.

> I think everyone, and you know, coming to me with ideas and suggestions and I think its all, everyone's wearing a bigger hat. I think it's made us better at looking at our kids for six or seven hours a day, whatever we're here. (SEC, P6, 108 – 110)

Regular communication among those on the formal leadership team was essential. Most principals met regularly with their designated leaders. These meetings provided structured opportunities to stay in touch, assign responsibilities and be as responsive as possible.

> I meet with them regularly, almost daily. And we catch up on events of the day, upcoming events, certain issues that may arise, and then we talk about who will be taking what responsibility in that particular issue and what's the best solution for doing that. So I've found that actually to be way more helpful, now that I have two or three minds working together on certain issues, as opposed to one. And so for me, developing that kind of shared leadership, that kind of an idea that I don't have all the answers and expertise in a single area, but rather I need to rely on other people's expertise as a way of doing some of the problem-solving and also dealing with some of the issues that arise immediately throughout the day or in the week. (TL, P4, 121 – 132)

By capitalizing on designates' expertise or specialization, principals demonstrated commitment to shared leadership, symbolically recognizing leadership capacity.

Teachers began to recognize that everything need not be directed through the principal. They also began to recognize that their experience and expertise provided a

"way in" for them to contribute to the leadership capacity in the school. A designated leader spoke of a teacher who had taken the opportunity:

> The one whose portfolio is the literacy, she has been able to provide a lot of leadership within our division one, in particular when they have concerns about a student, possibly with some special needs, they will often go to her before they come to me. What do you think of this? What are the possibilities? So I think they're getting that extra bit of help. (SEC, P4, 468 – 472)

Principals continually examined their roles with respect to sharing leadership as teachers began taking initiative. They encouraged teachers to see beyond their traditional roles as they began to redefine and put into practice supportive structures to facilitate teacher involvement. The following example from one school and one principal's experience illustrates this.

> Relationships are much stronger. I think the other thing is that teachers are being proactive in every area: achievement, discipline. I had a teacher come to me last week and say, "Here's an idea that I think would make us better in this area. What do you think about it?" And I said, "Why don't we go and investigate that together?" And I think part of it has been me learning not to take every monkey on my back. Now that could have been, I could have said, "I'll investigate then." And you know, it's their idea: why shouldn't they investigate it? Why shouldn't I just support that idea? So you become very much more in a supportive role. (TL, P1, 683 – 693)

Principals consistently sought to engage teachers and encourage their leadership. That principals made it clear they did not have all the answers, helped set a tone that encouraged individuals to step forward and take on small projects, offering their expertise and leadership.

> So I believe by kind of setting that stage, it allowed the opportunity for this person to come forward and say, "I can take care of that," at which point I say, "Thank you very much. It's yours, and way to go." And try to find ways to support that. (TL, P4, 231 – 235)

In summary, leadership capacity was enhanced and encouraged through the principals' commitment to effectively involve others in the required operational

adjustments. They looked for and found opportunities to share leadership. They involved teachers in ongoing discussion and dialogue as they identified common interests to bring together the distinct cultures that existed between the sites. Maximizing the role of the formal leadership team provided an "in house" model to demonstrate leadership in action. These leaders demonstrated to other teachers that sharing leadership involved capitalizing on expertise on staff and accepting that delegation provided a point of departure for meaningful and worthy opportunities for involvement. The increased involvement led to new and expanded understanding of leadership roles in their schools. The next section further explores the development of leadership and growth in capacity.

Leadership – expanding understanding (A growing capacity to lead)

The experiences of the designated leader in the twinned schools led to a revised understanding of what leadership means and how it plays out in schools. Principals were challenged to facilitate the process of redefining leadership in their schools. In part through dialogue, discussion, and providing opportunities, principals helped some of the designated leaders discover that activities and school roles they had been involved in through regular classroom duties were, in fact, leadership roles. For one designated leader, this "discovery" related to work with student teachers:

> I have always worked with student teachers, loved working with student teachers and he said that is leadership and it is something that I have never really thought of. I have always enjoyed that. (SEC, P1, 360 – 364)

Deliberate steps to empower teachers as leaders were taken in some schools. In several, common professional development experiences provided a foundation for growth. As mentioned, at one school the staff explored "solution focused counseling." Doing so provided teachers with a set of tools necessary to assume a more direct leadership role in relation to classroom discipline. The designated leader in this school observed:

> More of our teachers have had solution focus counseling now, and it's just something that people are adapting into their regular discipline program, and it's just been amazing at, you know, when they're just having a conversation with a kid they're able to get at, the kid is able to articulate, the student is able to articulate what the problem is instead of the teacher telling them what the problem is, and hearing their perception, and working through it. (SEC, P4, 132 – 136)

Teachers began taking greater responsibility to work with others, to share discoveries, and support one another. One principal reflected on his role as facilitator:

> It comes first of all from building the need from within, as teachers did. You know, to see some kind of change needed or growth needed or whatever, and it's awesome. I have them volunteering constantly to go and take these new courses at night or whatever. They really need to be a part of that. And so I see myself very much as a facilitator. I move around the building all day long, I make sure I get into every classroom almost every day, ask teachers how things are going, just to support what's going on in there and to keep the relationships flowing and communicating. (TL, P1, 636 – 647)

Developing leadership capacity required that the needs of teachers be identified and understood. Leadership opportunities expanded in each of the schools as solutions were identified. A designated leader described the beginnings of this process:

> We have asked the teachers to make a connection with another teacher so that if you have that student who's really having difficulties in your class, instead of sending them up to a time-out room in the office where sometimes it's more exciting, we'd rather have them in a different environment, but still a learning environment, but just away from their peers, that is, that's the first step that we're working at in trying to get the change happening. (SEC, P4, 111 – 117)

The handling of discipline was a common concern in a number of twinned schools. Having an approach to address the immediate needs like discipline was an important "first" step in building capacity and giving teachers the confidence and the tools to practice a change from tradition.

Team Building – key strategies

All of the principals saw team building as key to enhancing leadership capacity that allowed involvement to change and increase naturally. One principal noted the advantages:

> We have people that just step up to bat and say, "You know, this needs to be done. I'll take care of that and work with these people on this issue." And they get others involved. And so that shared leadership thing is starting to happen natural, more naturally. We have to have less, fewer rules and less, and less confines with this shared leadership approach. So more is being done. (TL, P1, 367 – 373)

When the principal and the designated leaders in a school shared a common philosophy, team building was easier. Others in these schools seemed to recognize when the formal leaders shared a common vision for the school. In turn, many became actively involved in supporting the vision. In a sense, the common vision became an important focal point for team building in the schools. A designated leader described how this played out in one school:

> I think because we have such similar philosophies and training, like a similar ground, I think that has really helped to create the team. Now as far as shared leadership, the role of the leader, you know, certainly to have the vision, and to bring everyone on board with that vision, and get them moving towards that, I'd say that he has really worked closely with me sharing his vision, and shaping it, and then the way he presents ideas to the staff, the two of us work very closely so we will do a lot of research in the background so that when it's presented to the staff we're able to, dialogue and get ideas flowing. (SEC, P4, 51 – 59)

In each of the twinned schools, team building occurred over time and contributed to the development of vision. The development of "new identities" paralleled this growth as leadership capacity evolved.

New Identities

Whole campus staff gatherings provided opportunities to begin exchanges of information, and thus were important to the development of "new identities." In one school, the principal created an event to celebrate and bring people together. The event provided time and opportunities for relationships to begin. As confirmed earlier, principals recognized that sharing was an important ingredient to team building and a beginning to the process of developing a new identity that would encompass both sites. One principal noted how he provided opportunity for such sharing as one component of a professional development day:

> We had student teachers here and we had a going away lunch for them on one of our PD days. And of course, everybody had a wonderful time. They leave feeling really good. The feedback from the staff was that they really look forward to these PD opportunities; they really enjoy them. So they're enjoying that camaraderie, they're doing some sharing. Once again, they don't have a lot in common, except they're on the same campus. And that's what I keep talking about, that next level. That of looking at student learning, because you can make some changes. But trying to make sure that that gap isn't there because of our two separate facilities and getting that thinking on that linear line is going to be the challenge, and it still is. But they're working well together. (TL, P2, 412 – 424)

Time and successful experiences were essential to the emergence of new identities. The camaraderie was a starting point to steer thinking toward student learning and the potentially positive impact they could have together. Teachers at some sites, who were initially resistant to the twinning, began seeing positive results in areas of resource sharing, staffing arrangements and programming expertise. As one principal observed:

> It's evolved to where people are feeling pride, because they're seeing results. And so people that might have been saying earlier

> on, you know, "Why are we doing this?" or "Yeah, we'll do it, because we have to do it and we're not going to complain too much, but I still don't really understand why, because we were doing fine before." They are now the ones that are saying to people, "You know, this is kind of neat," and they're looking at it now as something that they're part of that's kind of a little bit evolutionary, and they're kind of saying, "This is kind of neat, you know." And they've gotten to know the people at the other campus. And [there are] strong teachers there, as well, and strong teachers here. (TL, P5, 509 – 522)

One of the principals made a conscious decision to encourage relationships through celebration and recognition of individuals who contributed to the newly forming team. He did so by identifying and saluting team members in public forums. For example, at meetings with staff and with parents, he spoke of team members and their capacity to be leaders. He was building a new sense of identity, associating leadership skills with the teaching staff. He also featured teachers in school newsletters. In his words:

> We've changed our whole focus of our newsletter and now it's a parent community newsletter, so I always address parents and community members. I put in it something called the "Teacher Feature," where we feature a couple teachers and we feature some of the staff members on the team, so that people start identifying and building relationships with some of these people. And there's a personal section of, you know, things that they've done in their life with their families, et cetera. And it builds connections. (TL, P1, 417 – 425)

Principals and designates were instrumental in facilitating and drawing attention to the successes experienced as meaningful sharing occurred and advantages were discovered. This helped encourage the process of growing together, developing skills as leaders and contributing to redefining the school's identity.

Focus on Relationships

One principal attributed his success in team building to ongoing attention to relationships and his own role of communicating that contributions are recognized and appreciated:

> People have bought into the vision. They've bought into the team. They see themselves very much as part of it, and that's through building relationships, through me communicating, "You count." You know? "You have something to offer here." (TL, P1, 385 – 388)

In working to elevate the involvement of team members this principal ensured he "walked the talk." He built in rewards for teachers and other staff in efforts to create feelings of satisfaction. Collaboration was encouraged and the benefits of "team" made explicit. The designated leader attested to the unrelenting focus on team and the important role relationships play:

> We had a couple of teachers move in and they've formed some really strong collaborative partnerships with other teachers here, and I think there have been a lot of connections through, just simply because of the grade levels, and I think they have been really open. We have a wonderful staff here, and we don't have any islands working just all by themselves. We really have people working well together, so. The principal places a very strong emphasis on team. Everything is team. The language is team, but not just the language but the whole approach is what will the team think, and everything is sort of thought of in that model, and I guess you can't help but start to form the relationships like that when everything is focused around that. (SEC, P4, 441 – 455)

In creating an environment where leadership can be effectively shared, principals learned the importance of language and choosing the right words to foster the positive attitude that led to contribution. One principal made an important discovery that helped shape the way relationships grew:

> One of the things that I've learned over this year is to change my word from using the word "accountability" to "responsibility." "I feel responsible for" will develop responsibility, as opposed to "I am accountable for." It has a whole different ring to it and a

> different way that I perform. And as we dialogued about those things within our relationships, that has really assisted us. (FG, P1, 400 – 406)

Relationships flourish when communication is strong and consistent. Principals kept an open agenda and encouraged lots of discussion as decisions were made and growth occurred. Relationships became building blocks for team development and the sharing of leadership. The principal engaged the formal leadership team in dialogue on an ongoing basis about these important connections. One principal reflected on the grow and success in this way:

> There are two things that we need to keep in mind. And that is building strong relationships built on solid communication. And those are the two things that we constantly talk about as an administrative team, as an educational team. And I think that as long as you keep those two things at the very top, everything else can sort of, you know, fit into that continuum. (FG, P1, 389 – 398)

As noted above, the formal leadership team made an important contribution to the team building that was occurring school wide. This formal team, and its role in developing leadership capacity, is examined more closely in the following section.

The "Formal" Leadership Team

The formal leadership team in the twinned schools took a variety of forms. Size and demographic conditions, as well as what was in place before the twinning project, influenced this form. The traditional understanding and the perception of the authority in the role of principal and assistant principal influenced how some of the twinned schools organized the leadership team. This was particularly evident in the larger secondary schools. In some of the twinned schools new ways of organizing the team emerged. This ranged from opening new formal leadership positions, to a phased in plan of introducing new formal roles to ensure that administrative needs were met. Release time was provided to teachers in some schools to expand and support the team. Unique

organizational models for the formal team emerged in some of the sites. As one principal described:

> We have done some different things. One of them is the curriculum coordinator was the athletics director, because the amount of time that was there. And then everyone else was just given extra release time. But before, you need to understand that I've given all teachers extra release time here, because of the twinning and because of the changes and the dynamics going on and the mandate we have for change. And so if lead team got more release time beyond the rest of the team, they're getting considerable more, so they can really put in and do the job. (TL, P1, 497 – 506)

In the model of school organization described above shared leadership was facilitated by providing release time as a strategy to recognize the changes in formal, designated leadership roles, as well, informal "lead teachers" roles had the opportunity to develop. Enhanced status and the growth in accepting expanded roles of colleagues helped support and validate the "lead team" members. One principal commented:

> And I do get the sense from each of our lead team members that they also enjoy a bit of the prestige that come with this, because they have other colleagues coming to them asking for their advice. And it just engenders the leadership within them. (FG, P2, 192 – 197)

Principals initiated dialogue to exchange information and share points of view. This active approach to planning and responding to issues within a team approach helped address classroom needs. One principal spoke of the role the curriculum coordinator played in such matters:

> Because they are colleagues, they provide a lot of support to teachers in terms of some of the curriculum support, ideas, strategies. And quite often I will have conversations with the curriculum coordinators and say, you know, they'll bring up an issue and we will talk about it, and think about what strategies might be working. And so then we in fact lay out another strategy of how we're going to approach it and what might be constructive things to do. (TL, P4, 547 – 553)

The challenges of providing leadership in the changing environment that the twinning project presented created meaningful and reflective learning experiences for the designated leaders. The success and the willingness to rise to challenges led to growth. One new administrator in the project spoke of the challenges and the opportunity that transcended the twinning and brought a wider perspective to the experience of school leadership. She commented:

> There's a challenge being a young administrator. There's a challenge dealing with a person who has taught in your school, and only your school for 25 years, who has always done things one particular way, has gone through 5 to 6 principals, if not more, that have been on the verge of retiring, have their own leadership styles, and all of a sudden I come in and I want to start making changes, or I start telling them what's acceptable and what's not acceptable. That's a difficult thing to do, but that isn't because of the twinning issue, that's because of the leadership issue. (SEC, P5, 844 – 851)

The expanded team and the related leadership opportunities spread leadership efficacy and provided opportunities for these leaders to gain insight and understanding. These opportunities served as a kind of "spring board" for seeing new opportunities in leadership, thus contributing to a growth in capacity. Consider the comments of this designate:

> A lot of the teachers felt they had a lot happening within their own class, and they weren't quite sure, whereas a few of our teachers here haven't had a formal leadership role yet, but some of them are starting to look and see what it would be like to be curriculum co-ordinator, or to be an assistant principal, and through these experiences of being in the office a little bit more, and seeing the discipline, and seeing parent issues, and they're getting just snippets, but a few of them are starting to think, maybe some type of leadership might be for them. So I think it's been a very interesting process because I think it's been a springboard for some people to want to maybe jump up to the next level. (SEC, P4, 200 – 209)

In summary, the team concept that evolved in the twinned schools was instrumental to the growth of leadership capacity. Formal leaders, sharing a common

philosophy and vision became a focal point for this development. New identities, unique to the twinning, emerged as staffs worked together and experienced the advantages of resource sharing, combined staffing and shared expertise. Relationships developed and flourished as the principals concentrated on making the results of collaborative initiatives something to celebrate and recognize. Positive relationships were an important building block for team development and the sharing of leadership that resulted. The formal leadership team adapted to the twinning and provided an important means of sharing the leadership. Staff members were exposed to new roles and leadership experiences. The emphasis on consistent communication and ongoing planning provided a supportive training ground for learning and making ongoing adjustments. The sharing of leadership that resulted provided positive experiences for staff that supported the growth in leadership capacity. This is examined in further detail in the following section.

Shared Leadership - Building Capacity

The principals of the twinned project were faced with the challenge of understanding leadership and the role of the principal differently. The twinning project presented opportunities and necessities for changes to the way leadership played out in the schools. The need to create meaningful involvement and share leadership with others meant charting new territory and redefining traditional roles. The constructivist perspective on leadership presented by Lambert (1995) offers a point of reference as principals struggled with the uniqueness of the challenge. "Leadership, like energy, is not finite, not restricted by formal authority and power; it permeates a healthy school culture and is undertaken by whoever sees a need or an opportunity" (p. 33). As noted previously, principals spent considerable time and energy helping to create the conditions for relationships to develop and roles to expand.

The style, experience and preferences of the principal, combined with the school condition and size, dictated different approaches in the variety of twinned environments

involved. A range or continuum, with hierarchical authority at one extreme, and the constructivist theory (collaborative in nature) at the other end can be seen in strategies principals used to share leadership. They created the conditions, and established the opportunity for staff to share in the leadership of the school in a variety of ways. The description of the principals provided in Table 4.1 provides a perspective, which may be helpful in understanding the variety of approaches implemented. One principal, closer to the constructivist perspective, established an environment where the ongoing exchange of ideas was welcome and encouraged. He commented:

> I think there needs to be lots of dialogue. Talking about who we are and what we want to become and how we will all function, and that's the beginning of developing some relationships and communicating about shared leadership. (FG, P1, 529 – 534)

This is in contrast to another principal who took a different approach. The strategy he took at start up was more authoritarian, "I think it was crucial to get it up and going. Some of those key decisions needed to be made right off the start" (FG, P1, 121). This principal acted with authority in an effort to ensure a predictable beginning. He made a clear policy statement that students would not be sent to the office, where often only the office staff would be present. Although this was an authoritative move, it also served as a beginning for a view of leadership which involved everyone. The directive brought out teacher resourcefulness and leadership. This principal describes his conscious approach:

> There were spin-off discussions about how are we going to handle those things and what are we going to do. And right away everybody in a sense sort of self-organized and said, "Well, we're going to handle it this way. And we're going to do this and this and this." And it hasn't been an issue. Teachers have had buddy classes and they've had to send somebody over, and they've worked it out quite actually well. And for me and my authority it's being really cognizant that sometimes those statements of, "We will do it this way," are really important in getting everybody moving in that direction. (TL, P4, 731 – 740)

Reciprocity – the nature of effective involvement

One characteristic that these principals shared was their willingness to take risks and face unknowns. One principal spoke of structuring opportunities and facilitating the sharing of expertise to create meaningful leadership opportunity for teachers. He commented:

> So in terms of leadership again, I think that all I have done is set the stage and set it up and structured it in a way that we could take staff expertise and get them to start sharing some of the good things that they're doing. And using that time, then, to have those professional dialogues. (TL, P4, 278 – 285)

All twinned schools referred to the use, access and sharing of resources as a strength of the project. The sharing and the opportunities between sites took on many forms. One principal described the growing exchange:

> The staff goes back and forth. The kids go back and forth on special days, like we had the paired reading, when a junior high reads to the elementary. And the choirs go back and forth to perform. (FG, P2, 627 – 630)

Demographics established a variety of variables that principals had to deal with in facilitating these opportunities. In the small school sites, the increased number of additional minds in a combined setting became an immediate benefit. More things became possible in terms of sharing resources that would enhance teaching and learning and support the professional growth of those involved. The new relationships that became possible because of twinning were empowering opportunities and reciprocal in nature. One principal described the benefits:

> In the small site you have staff that are one of a kind. You know, the person who's the math instructor is somebody who did science and so on. And they had to do everything, in terms of designing the exams and organizing all the resources and so on. As soon as you pair them up, they now have a colleague that's doing the same work that they can share with. Suddenly they can share the jobs with and benefit from what other people are doing. And I think

> that certainly was something that the staff appreciated. (FG, P2, 133 – 142)

Principals began to recognize and accept that patience and time would be required to effectively meet all the demands and develop an environment where reciprocity contributed consistently to growth in leadership capacity. Commenting on this, one principal said, "So it is a slow process and that first year was going to be like that. I think next year will be even better" (FG, P1, 268).

The principals continued to set high standards and found motivation to do so as a result of the support they had in meeting regularly as a group. The sharing of perspectives and experiences was valuable. One principal pointed out the value in common reflective opportunities:

> The other thing is what I think was a part that I really found for me personally was our twin meetings with principals. I found that I got so much out of just coming together once a month to start with, then once every two months, just sharing the common problems and successes I found I came away from every single one of them feeling good. And the more we met, the better I felt. (FG, P1, 435 – 441)

This element of reflection on process, frustrations and accomplishments also applied to staff members of the twinned schools, particularly the designated leaders.

Experiences of the Designated Leaders

For a number of the designated leaders involved in the twinning, the leadership experience was positive. It provided challenge, created motivation, and allowed a growth in efficacy. Support for the changes grew from the opportunity to exchange expertise and the resulting growth in confidence that was experienced. One designated leader spoke of being empowered in the context of being part of a leadership team:

> I gained confidence in the knowing that I've made right decisions, as well, and I hear that when I'm sitting in an administrative meeting and they're saying, yeah, you're right. Or to hear them, who have had a lot more experience than I have in the field, say to me, I don't understand this thing about the program, help me out

> here, empowers me with feeling like I can actually teach them something as well. And so there's a constant, and a real sense of support. (SEC, P5, 941 – 946)

A healthy amount of reflection, combined with being given the opportunity to focus on leadership created growth in many of the leaders involved in the twinning. One of the designated leaders expressed enthusiasm about the new experiences in leadership the twinning project facilitated:

> I would have loved to have written a diary or written a book about my experiences just based on the leadership role that's been involved in taking on this kind of a position because of the way I was offered the position, and because of my background coming into it. I just think it's fascinating, and I think that I've learned tenfold because I didn't expect to be in it, because I didn't expect to take on a leadership role period. (SEC, P5, 852 – 857)

The positive experiences of the designated leaders influenced the experiences of others and contributed to expanding leadership capacity in the twinned schools.

Strategies for Meaningful Involvement

The schools involved in this project each progressed toward understanding and defining shared leadership as it played out in their own schools. Models emerged shaped by initial decisions and strategies adopted and developed as they pursued their work together.

In one setting study groups provided a vehicle for people developing common understandings. Drawing upon the literature helped one school develop understandings based on the experience of their particular school. In the words of the designated leader at one school:

> We have really used the study groups to build the whole team, and I'd say the shared leadership is continuing to evolve, and I know that next year for the study groups he's going to be using Linda Lambert's *'The Constructivist Leader'*, But I don't know if everybody quite understands what shared leadership means, and I think Linda Lambert might have her take on it, and our school is creating its own little model of it, and I think there are many

> people at different stages, and I think we have to honour that as well. (SEC, P4, 524 – 532)

Near the end of this first year of operating as twins the principals met together to share their successes and discoveries as well as process their questions and frustrations. In reflecting on their achievements, one principal observed that much of what they learned could be applied outside the twinning project to district schools in general:

> One of the things that we agreed to at one of our earlier meetings and that is, if we listed all the good things that come out of twinning, there wasn't any of them that we couldn't achieve without twinning. Like all of the things that we were doing between the two sites, if they had been two stand-alone schools with two stand-alone principals, couldn't we have done exactly the same thing? And the answer is of course, we could have. But no one ever did. So it's an interesting observation. (FG, P2, 664 – 671)

The sharing of leadership that the twinning encouraged and required became a catalyst to encourage principals to use a different set of lenses with which to examine and understand their roles.

As one school team met to hire new members for their team in preparation for a new school year, they reflected on their growth as a leadership team. The principal observed that:

> At the end of the night, I did a recap of the whole team and one of the things that they said to me was, "We didn't realize we'd come as far as we have." (FG, P2, 255 – 258)

Summary – Leadership Capacity

This chapter has narrowed the focus to describing the work of creating meaningful opportunities to share leadership in the twinned schools and build leadership capacity among the people involved. Through describing processes, strategies and approaches, it draws attention to the importance of determining effective ways of sharing leadership. Models emerged that were unique to each setting as the people, relationships and reaction to the changed environment varied from school to school. Principals were

challenged to address the fundamental question of how to bring two different cultures together.

Successfully sharing leadership and building capacity required that new understandings be developed about the form and meaning of support. Teacher needs had to be identified and understood. Team building was a common strategy for maximizing opportunities for involvement. New identities that included the total campus perspective began to develop as roles reformed around sharing of expertise and resources. The formal team of principal and designated leaders provided models, examples and initiatives for expanded involvement among staff.

The value of reciprocity in sharing and relating brought recognition of mutual benefits. This expanded meaningful opportunities for collaborative leadership. Arriving to this point was a different journey for each of the principals. Principals pursued a variety of approaches, ranging from authoritarian to collaborative in efforts to maximize meaningful involvement of staff.

Broad-based, skillful participation had begun to emerge. Leading and learning found common ground. Lambert (1998) provides an apt concluding comment shared leadership: "expanding leadership roles takes two forms: (a) taking on additional tasks or functions and (b) behaving more skillfully in daily interactions (e.g., asking questions, listening, provoking, feedback)" (p. 96). This "re-framing" that Lambert describes, characterizes the work of the twinned principals in this first year of an innovative, district initiated, project.

CHAPTER VII

REFLECTIONS AND RECOMMENDATIONS

The over-all purpose of this research has been to explore the ways leadership plays out in a twinned school environment. These dynamic settings presented operational challenges related to the immediacy of change. Leadership capacity increased within these schools and models for sharing leadership emerged as the people in these schools were required, without exception, to adjust and depart from traditional, established practices. Even though the emphasis in this study is on the role of the principal as the primary leader being instrumental in setting the leadership atmosphere within the schools, the effect on others on staff, particularly the "designated leaders" contributes to understanding the adjustments and changes that occurred.

The twinning project served as a catalyst in setting the conditions that precipitated changes in the ways leadership was approached. This chapter brings the practice of six principals and their staffs together with the literature on providing effective and responsive leadership. The second part of this chapter: "Reflections on the Research," draws on the findings in chapters four, five and six for discussion and analysis. The central findings from the research are identified and discussed. The research questions are addressed in this section, which begins with reflections on my relationship with the research and the data collection and analysis process. Over the course of the research my relationship changed and developed. Returning to the active role of principal certainly influenced my perceptions.

Reflections on the literature follow. The goal here is to provide some of the personal responses I have had through out the process of the research. I present the reader with the contributions to theory that this research makes and describe potential for further investigations. The focus is on the leadership experience and the catalyst that the twinning provided to explore and invest in different ways of providing responsive

leadership. The findings of this research inform the literature and place, in a meaningful context, some of the ways trait, behavior, situational theories of leadership, and best practices combine to influence the processes of developing models of shared leadership. The literature offers insight into the progression and change leadership in the twinned schools underwent in the first year of operation. Relevant themes from the literature are identified and their importance illustrated.

Following the reflections on the literature, recommendations are presented. Some of the important leadership practices (influenced by attitude and approach) are presented as "Tenets" of leadership for all principals. This list of strategies and key emphasis illustrate how what can be learned from the challenges and success of these six principals and their staffs may be applicable beyond the twinning project into the wider field of school leadership.

Suggestions for further research are included in the recommendations section. The twinning project is presented here as a "starting point" from which related studies may reach out from and continue to shed meaningful insight into understandings of responsive leadership and building capacity for sharing this leadership with other "knowledge workers"; teachers and leaders of the future.

The chapter concludes with a brief summary and general reflective comment.

Reflections on Being A Researcher and A Practitioner

It is important for the reader of this research to be aware that as an experienced principal I have insight and understanding into the role of the principal. Throughout the course of this research I felt that I was exploring familiar territory related to the leadership dilemmas and challenges presented. I could empathize with many of the situations, and opportunities the participating principals were dealing with.

Part way through the process of gathering data I was appointed to the principalship of one of the multiple campus schools included in the study. My

relationship with the research changed significantly. I was no longer working to reveal strategies or make recommendations about models of shared leadership for others, I was trying to understand them and, indeed, making them for myself as well. This change helped create a personal relationship with the data and established an urgency to understand the demands and identify the solutions. In the final stages of completing the data analysis, I found myself involved in "action research." I was at once a researcher and a practitioner. My awareness and understanding of the emerging themes, combined with my new role as a twinned principal, allowed me to put into practice some of the strategies and ideas I found in analyzing the data. In many instances the data took on new meaning as this different perspective influenced me. This is reflected in all the interpretations and reflections presented in this final chapter. I was able to draw on the "best of the best" as it were, and had the advantage of applying the discoveries and learning of others to great advantage. My struggles as principal to follow the practices identified in the study assisted me in the practical world of being a principal in a twinned environment but also (at the same time) gave me insight and understanding into the full meaning of what the principals that participated in this study really went through. I continue to hold the highest respect for this group of colleagues.

I must acknowledge, however, that the shift in my role as a researcher from being somewhat of an "outsider" to being an "insider" may have caused me to miss some of the meaning in the data. Outsiders and insiders see different realities in any situation. I do not necessarily see this as a limitation, for as an insider I very likely found meaning where an outsider would not have.

Reflections on the Research

This section begins with reflections on the four research questions that guided the study. Woven into the context of these responses is a general discussion and analysis as applied to the over-all study. Further discussion is pursued in the "Central Issues" that

are subsequently described. Here the emphasis is on capturing some of the specific learnings that these principals made about twinning and about leadership.

Reflection on the Research Questions

In what ways do principals experience change in their roles when they assume responsibility for "twinned" schools?

In all cases, and with a high level of agreement from all participants in the twinning project, the opportunity to be involved in a growth experience was prominent. Being assigned to twinned schools presented both challenges and opportunities. The workloads increased considerably and new experiences created demands that were often unknown and difficult to predict. For the principal, this was a journey into uncharted territory where every opportunity required careful decision-making, willingness to risk, intuitive hunch following, and hard, committed work. The participants in the study shared a commitment to work hard and experience success. They felt honored in a number of respects to be part of this district initiative and took the challenge seriously.

The ways principals responded to the challenges and operationalized the multiple campuses varied by site and by individual. The orientation, background, beliefs and experiences that they brought to the role influenced the approach they took and the decisions they made. Ultimately their individual leadership traits and the circumstances (and their relationships within the situation) determined their approaches.

The principals in this project were faced with time constraints and the on-going demand to examine their own practice and make informed decisions about departing from traditional practice related to the role of the principal. The twinning was the catalyst that created the demand to be less hands on in daily operations and more reliant on the support and leadership of others. Being able to step back, accept ambiguity and support others in the work of leadership became an important requirement that demanded patience and a willingness to trust the work of others.

Sharing leadership with others became a deliberate focus early in the first year. There were operational issues of immediacy as well as long term issues related to parent involvement and common purpose that needed addressing. There was a range in the way meaningful leadership experiences developed at the different sites. The importance of identifying common purpose and bringing staff together in meaningful ways took a variety of forms reflecting differences in the needs of the learning community.

In a number of instances principals used their authority to set direction and create an understanding of needs and actions related to the changes being experienced. They felt that some issues demanded immediate action and believed that acceptance and changes in attitude would follow successes in this new leadership environment. This strategy was applied to operational decisions as well as to decisions related to direction setting staff development experiences.

How does leadership unfold for teachers in a "twinned" school?

This second question focused on the experiences of other members of the staff related to the changes in leadership. The second set of interviews with the designated leaders presented the teacher perspective. New demands were made on teachers. This was inevitable. They were required to become more self reliant in dealing with daily classroom issues. Discipline is an area of prominence in the minds of teachers. A new understanding of support needed to develop. Given that "the office" was not a constantly available strategy, teachers had to become involved in sharing with each other and developing other strategies. In most cases, "networks" of teachers arranged support for each other. Support from the principal became more a providing of "tools" to do effective work in the classroom. This included such matters as dealing with difficult parents and advocating for a positive focus on learning.

Lead teams, identified and encouraged by the principal, played the role of providing support in some settings; in others the formal leadership team of designated

people made adjustments in their roles and took on new responsibilities not commonly associated with their roles.

The degree of collaboration and involvement of teachers in school wide issues varied. Some of the twinned schools relied more heavily on the traditional hierarchical model where designations were revised and formal leadership positions were created or revisited to meet the demands of twinning. In other situations teachers responded positively to opportunities to accept involvement and leadership roles outside the classroom. Here the leadership structure was based more on collaborative roles and a broader sharing of leadership. Support grew on a collegial level.

There were some teachers who experienced difficulty with the departure from the more traditional view of what a "good principal" did. Reactions were not always positive and this element of resistance was a reality that the principals needed to deal with.

Teachers also experienced changes in communication practices. Teachers received weekly memos in some instances and had both formal and informal opportunities to stay informed. In a number of sites, the principal featured regular celebrations, providing recognition of teacher involvement and success in the classroom. A number of principals also made concerted efforts to engage in one on one, small group, and more informal dialogue as a means of involving and staying "tuned in" with teachers.

The fact that the principal could no longer be the traditional "hands on" leader in the school meant identifying ways to share leadership responsibilities and involve teachers. The perception of what twinning would be like at the start of the project needed to change as problems and issues were resolved. Teachers needed to be flexible and accept change. For the most part, teachers did respond positively and through their involvement and collaborative work outside the classroom, made contribution to the successes. Identifying and practicing ways of supporting each other was perhaps the most rewarding.

How do principals develop leadership capacity among the professional staff in the school?

Once principals accepted the need to operate differently and consciously share the leadership in the school; planned and deliberate changes began to take place. Developing leadership capacity is a dynamic and challenging process. Principals were able to support and empower teachers to have meaningful involvement once they accepted their own limitations, recognized the increased demands and the need for a redefining and redesign of role descriptions and changing responsibilities. As principals stepped back from the "hands on" approach to their role and began turning to others, leadership capacity developed in a number of important ways.

A formal leadership team, with designated roles was reconfigured to provide the coverage and support needed at both sites. This naturally built the leadership capacity. This expanded team also reached out to others on staff, encouraging involvement. In a couple of the sites this evolved into the formalizing of "lead teams," with members of the team accepting portfolios or responsibility for specific programming features in the school.

The principals spent time and energy identifying and articulating a common mission statement for their twinned campus. They worked with staff, emphasizing commonalties and potential rather than dwelling on differences. This "set the stage" for meaningful contribution and encouraged leadership in others. Once this "focusing" ingredient was in place opportunities to establish reciprocal sharing among staff and across sites were more readily recognized. Teachers began to look at leadership differently - the focus was off the "position" and more on the activity. Seeing that the activity could contribute directly to success in learning in the classroom led to the involvement becoming more broad based.

Demographics and the specific needs of the combined sites also influenced how capacity was encouraged. The type of shared work that emerged varied from site to site. One important determining factor was the common connection between sites. Those with things in common found sharing and reciprocity emerged more naturally. A flow of information and resources between sites grew as mutual purposes were discovered. Sharing curriculum resources and common field trip experiences are examples. People, resources, and expertise began developing as some teaching assignments moved to cross campus, combined assignments. Working with students across both campuses placed teacher leaders in the position of creating experiences that supported the mission of the twinned school and strengthened the learning experience for students in cost effective ways. Recognizing these advantages, through action, did much to enhance leadership capacity.

What contributions do staff development opportunities make in addressing motivation, commitment, and involvement?

The staff development opportunities structured for the twinned schools had considerable influence on staff attitudes and relationships. At each site, principals chose appropriate ways to bring their teachers together in meaningful ways. This included both formal and informal approaches. They recognized the importance of building relationships and the need to share common purpose. In a number of instances, external presenters were involved in cross campus sessions. The value of having outside, objective presenters supported team building and provided a common experience and reference point for all to build upon. Other approaches centered on identifying school needs and interests and implementing collaborative study groups. This brought teachers and staff together. They had a professional focus as well as the opportunity to build relationships, discover potential in combining efforts and engage in "possibility" thinking.

Less formal staff development opportunities were pursued on an ongoing basis. This involved dialogue with the principals in the first instance, then with "lead team" members in individual and small group settings. This process of dialoguing developed and grew from the commitment and positive attitude demonstrated and practiced by the formal administrative or leadership team at each site.

There was a concerted effort to address the common vision as part of the more formal staff development initiatives. Principals took full advantage of the flexibility the district provided to facilitate opportunities to come together. The general focus was on providing the tools so teachers could continue their focus on student learning while adapting and adjusting to the reconfiguration and changed roles.

The work to articulate the school mission and shared vision helped teachers focus on common elements and potential; things they had in common as opposed to seeing only the differences and limitations. Principals were at once responsive to needs and progressive in being direction setting. They endeavored to honor the identity and culture of the individual schools, ensuring core values could remain the same while at the same time focusing on new directions based on student and community needs.

A professional focus, like shared work related to the teaching quality standards is a different example of how addressing common concerns led to sharing across the two sites and building relationships that teachers needed in order to feel part of the total twinned environment.

Two key strategies principals used to create meaningful involvement were built around "study groups." They took different formats. One example described a deliberate use of current research; studying and discussing shared leadership. Initiative came from them asking how it would apply to them and the needs of the school. Another school met in study groups regularly to explore identified school needs and staff interests. Assessment and brain-based learning are examples of the topics.

Staff development experiences provided the "building" opportunities to look at common needs and helped keep the classroom learning program and the student needs at the top of the agenda. They brought people together with purpose and encouraged creative thinking with a focus on solutions.

How do principals and teachers in a small group of "twinned" schools experience leadership and administration?

The main research question was phrased with the literature in mind and the response serves as an appropriate bridge into a discussion on the literature. It is broad in its reference when considering the role of the principal. In reflecting on this question, I make the distinction found in the literature, between management and leadership.

The systemworld needs that Sergiovanni (2000) describes are relevant to the experiences in leadership in the twinned schools. Support staff and the formal leadership team, including the principal, adjusted their roles and were significantly conscious of facilitating effective management. Shared leadership, in this context, is directly related to roles and responsibility. Designated leadership roles took on more responsibilities associated with the principal role. The additional opportunity and experience provided these new leaders with mentoring possibilities and growth that many of them viewed as a positive contribution to their career advancement.

The district perspective is important here. Though there were instances of inflexibility, the over-all actions to support the twinning initiative were positive and open-minded. There were examples where the school management structures supported the non-hierarchical approach and empowerment that the superintendent referred to when initiating the project. The district "stepped aside" and let the schools determine their approaches. Though there were some limitations due to district requirements for information exchanges, district level staff worked to accommodate differences and

worked closely with principals to identify solutions. This working relationship and the spirit of openness was also evident at the school level.

A key element of the systemworld that was crucially important to the teaching staff related to discipline and student needs. The systemworld meets the lifeworld as the focus turns to student learning needs. The twinning project revealed a number of solutions to this issue that may apply to all schools. Keeping students accountable to the learning environment where the predictable consequence was removal to another classroom emerged as a key discipline intervention. In these situations teachers collaborated with teachers. A common awareness and acceptance of keeping the responsibility with the teacher, and the consistency of strong support from the well balanced systemworld of the formal administration team enabled this successful and workable solution. Teachers were able to effectively manage daily classroom discipline. Of course, the administration team, in collaboration with teachers, addressed extreme cases where support beyond the classroom was needed. A predictable, well communicated policy, was developed and followed. This can be viewed as an element of the "larger" lifeworld that is the topic of the next section.

The leadership or lifeworld aspects of the administrative experience are ideally supported by the systemworld. This is where high leadership capacity is extremely valuable. The lifeworld "is a world of purpose, norms, growth and development" (Sergiovanni, 2000, p. 5). If these elements are to be the focus of principals' action and attention, as I believe they should be, the teachers and other staff need the capacity to address the needs of the systemworld. The principal's role became one of facilitating and encouraging staff to take initiative and action to respond to the change in innovative ways. People needed to let go of some of the traditional view of what a leader should do and replace it with a view of personal involvement in the process of learning different

ways of addressing needs as they arose. This required collaboration and structured opportunities to focus on purposeful dialogue and community building.

When the principals were able to step back from a hands-on, traditional grasp of the role, the more empowered innovation emerged on the part of others. The approach to leadership ultimately affected the experience of all members of the twinned staff. The approach was dictated by the nature of the twinning, the situation, and the people involved. The principals had the added advantage of being able to reflect on their actions within the support group of the twinned principals. In all cases some form of reflection was seen as valuable and important to the growth and adjustment that was required by all.

Some of the Central Issues

As a way of summarizing the responses to the research questions the following section describes some guidelines that the principals followed. They are all drawn from the findings.

1. Don't do it all yourself – involve others, focus on empowering and learn the skill and take the confidence to "let go."
2. Be there for support – but understand how this support must be different in the context of twinned schools.
3. Maintain a focus on purpose and the Lifeworld as a foundation – the main purpose is the best possible student learning and achievement; plan meaningful professional experience; be mindful of the needs of all stakeholders.
4. Involve stakeholders in articulating a common purpose – be driven by the vision. Focus on what there is in common rather than all the differences that exist between sites.
5. Commitment and enthusiasm – see opportunity in challenge, be diligent.

6. Focus on people and relationships – people are the most valuable resource, value contribution, model it, be available, listen, identify needs and respond with consistency.
7. Effective and ongoing communication – keep everyone informed, be predictable and consistent.
8. Act to ensure the systemworld needs are addressed – focus on consistency, involve the support staff to the fullest, be responsive to the external service community.
9. Team building and the role of the formal leadership team – redesign roles and take risks, provide maximum opportunity for learning and build on collaborative models.
10. Professional focus and development opportunities – tied to purpose and vision.

Reflections on the Literature

This section begins by revisiting the research carried out by Rees (1996, 1997, 2000) and the recommendations her study made for the specifics of twinning. Some differences are examined that illustrate the uniqueness of the twinning project. From this point the reflections extend to look more globally at leadership. The discussion in the "Reflecting on Leadership Theory" section that follows is particular to twinning but provides insight into leadership, applicable more generally in the educational setting.

The latest research available from Rees (2000) related specifically to twinning states clearly that planning and preparation is a crucial ingredient to success. Involving all stakeholder groups was highly recommended and was seen as critical to ensuring support and success of the reconfiguration of schools. Rees's research was conducted in Ontario. In Alberta on the other hand, particularly this project in Edmonton Public Schools, there was little evidence of this planning to "inform and involve before" approach. The success of this initial year of a multiple or twinned campus concept in this school district can be largely attributed to the skill and committed hard work of the principals involved.

As in the Ontario case, collaboration was seen as an important aspect of achieving success with twinning. The collaboration that focused on the sharing of resources between sites is very evident in this study. In each case of the twinned schools, conscious effort to share resources, expertise, and develop common professional experiences took place.

The superintendent empowered staff at twinned schools with a sense of discovery and innovation coupled with an opportunity for personal responsibility and decision making. This motivating factor can not be underestimated in its influence on the principals as they accepted the challenge of implementing this innovation. An important criterion for the principals' involvement in the first place was their willingness to take on the responsibilities of the project. They needed to be able to be comfortable with taking risks, trusting in the people around them, and spending the energy necessary to maintain and develop meaningful relationships. If the superintendent can be said to influence the "macro" level of organizational leadership, where he modeled the confidence and belief in the skills of the principals guided by the vision of the district, then the principals of each of the twinned sites were to influence the "micro" level where development of the leadership capacity of teachers needed to be facilitated and encouraged so as to achieve the developing visions of the twinned schools.

The advantages and disadvantages cited by Rees are evident within the context of this study as well, particularly the advantages. There were cost savings but the highlight was clearly on the sharing of resources and expertise that contributed to the success of the twinned schools. In this study the focus on shared leadership and the meaningful involvement of others in important decision-making contributed to turning some of the disadvantages cited by Rees into advantages. For example, she identified decreased level of commitment and ineffective leadership as disadvantages. The twinning project in this study gained from the high level of leader efficacy found in the principals. Through

diligent examination of roles and responsibilities, others were engaged in the work of leading and effective practice grew out of responding to individual school needs.

The principals in these schools were empowered to define and understand the best working organizations for their sites. There was no attempt on the part of the district to define twinning, or dictate process in any way. This put the principals in the position of developing and defining the destiny of their own sites as multiple campus operations with no pre-conceived notions attached. This fact by itself was empowering and as a result the format and particulars of the varying arrangements at each site responded to the skills and approaches of the leadership in place. Each was influenced by the traits and orientation of leadership in the building(s) and took into consideration the unique characteristics of each school setting.

A number of the recommendations made in the literature about twinning are supported by the twinning project of this study. School matches that make sense according to size, location, levels, and needs ensure the existence of common elements to build collaboration around. This directly determines the nature of the struggle in achieving a common vision that is accepted by both schools in a twinned setting. Other important recommendations made in the literature relate to the need for open, effective, and purposeful communication both within the schools and with the stakeholder groups (i.e. parents and community) involved. Monitoring and record keeping are important as well. The ongoing reflection that the principals were involved in supports this need in the current study. All of Rees's recommendations were made within the context of the need for careful planning and preparation prior to the launch of twinning. Though this twinning project was clearly short in this regard, other benefits emerged. The principals, in a highly site based management model with a mandated initiative at the district level, had the responsibility to connect with their community and ensure needs were met. There were struggles, but overall twinning emerged in differing formats, which may not

have been possible if decisions about process and form were made before the project was initiated. The purpose for the twinning in each site was able to reflect the unique situations and people involved. Structure preceded strategy, and purpose was allowed to emerge. This is contrary to Rees's suggestion that strategy must precede structure. Allowing time to determine effective participation for all involved is an important point of agreement shared in both studies. The twinning project of the current study took an initial focus on leadership strategies in a changing environment and many discoveries were made in this regard as "time" was taken, and roles were redesigned. The next section addresses highlights of this evolution of models of shared leadership.

Reflecting on Leadership Theory

This study has focused on leadership, the roles, the responsibilities and how they have changed in response to twinning. The emphasis has been on understanding the changes and adjustments required by the principals in achieving and maintaining an effective, combined school operation. This section relies on the literature in highlighting important learnings and discoveries the study of these principals and their schools facilitated.

The experiences of the principals in the twinned schools resounded with what the literature says about the relationship between management and leadership as part of the total administrative role. They needed to be strong managers as well as effective leaders. They worked hard to avoid the colonization of the lifeworld. They turned to their support staff and formal leaders to share in the management of the school and keep the systemworld in balance. This was important to allowing time and energy for developing the lifeworld. Traditional perspectives and expectations needed to change as the realities of twinning were realized. Principals experienced success as they focused on people and commonalties and took attention away from differences between the schools. This is to do with the kind of common purpose that leads to extraordinary commitment and

performance describe by Sergiovanni (1995) and involves meaningful support for the teaching staff who had additional demands made of them. Commitment, recognition and celebration helped them move in many cases from the transactional to the transformational interactions needed to build relationships and extend involvement. There is evidence of moving from the "building" interactions to the more "binding" as teachers experienced success and the leadership capacity grew. They focused on people, seeing interrelationships key to maximizing involvement in non-traditional ways made necessary by twinning.

These principals were in the position of redefining and redesigning as they reconciled the leadership requirements in the twinned school setting, thus becoming the "change leaders" (Drucker, 1999). They were responsible for results but had the latitude to find ways of being responsive to the situations they found themselves in. With no "map" and no one dictating how it was to be done, they were in the position of having to take the action that moved their twinned schools forward. Drucker maintains the importance of putting those closest to the action in the best position to create positive change; for the principals, this meant learning to empower and, as Senge describes, involve others in creating futures, accepting the challenge of visionary leadership, and being "cocreators."

The contingency model of leadership confirms the importance of recognizing the many variables that influence the actions any one of the principals took. The twinning project was the catalyst that placed principals and their staff in the position to find new solutions and begin to change perspective. Regular reflection helped them deal with the clearly non-linear, often chaotic atmosphere that Sergiovanni postulates principals must learn to live with and thrive in. Involving others in meaningful ways meant different things to each of the principals. Their actions were influenced by the situation and their own traits and experiences. Effectiveness was achieved differently for each of them.

As involvement in leading developed and teachers found meaningful ways to participate outside the classroom, articulating a common purpose or vision became a focus in most sites. This was a process that was ongoing and tied to successful experiences. Out of this, role adjustments occurred, support was understood differently and action was taken by more than just the principals. The capacity for leadership in the schools grew. As the metaphor for the school became more a combined learning community (Sergiovanni, 1995), there was more involvement outside the classroom and more opportunity to influence and guide the direction of the school.

This growth supported the constructivist view of "doing it," making meaningful decisions where leadership becomes a verb; the action that all can be part of (Lambert, 1998). Paramount to this is a commitment to continuous improvement. Principals in this study demonstrated a range of effective practice that supported growing expectations of staff through professional development. The additional flexibility that the school district provided for them to establish models of ongoing professional development and collaborative opportunities had a positive influence on what these schools were able to achieve. It provided opportunities to focus on relating to each other and identifying meaningful ways of working together.

Developing high skill and participation levels among staff was a process that took time and diligence. Principals felt they needed to judiciously act with authority in some situations, while building values and commitment to guide decisions about behavior rather than needing to rely on rules and regulations. The principals and their staffs experienced growth in this capacity building while creating meaningful involvement opportunities that grew from sharing a commitment to the fundamental work of their school (Lambert 1998).

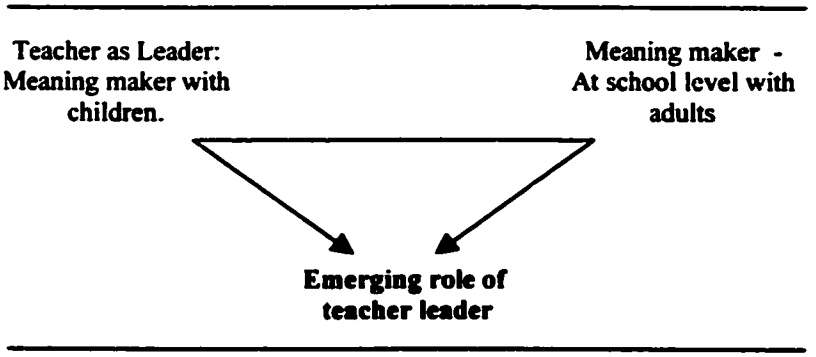
If an organizational change is to survive over time and create initiative for growth and improvement at the school level, effective and alternative models of school

leadership must emerge. Principals need to adopt new understandings of leadership and build structures that assist them to deal with the obvious complexities and challenges of the "twinned" schools. The more traditional literature referenced earlier in this chapter provides background and substance to the concept of what leaders (in this case, principals) bring to leadership positions in "twinned" school settings. The need to further develop an understanding of the principal role is extended and reinforced as one considers a constructivist perspective.

The notion of reciprocal involvement in the activities of leadership focuses on the sharing process that must be facilitated through the leader's role (Lambert, 1995). The basic re-orientation that occurs through investigation of current literature on the topic, and the meaningful involvement of teachers, confirms the importance of the need to revisit leadership models for schools. This entails honoring the element of moral and covenant leadership Sergiovanni (1992) and others have incorporated into the study of leadership where "people" issues and relationships are at the forefront along with doing the "right" things. "Reciprocal processes that enable us to construct meaning occur within the context of relationships" (Lambert, 1995, p. 34). These processes strengthen as they are practiced. "Reciprocity, or the mutual and dynamic interaction and exchange of ideas and concerns, requires a maturity that emerges from opportunities for meaning-making in sustainable communities over time" (p. 34). Out of necessity, principals in "twinned" schools must look for ways of sharing leadership and maximizing meaningful involvement to bring growth and improvement in the schools involved.

From a traditional view, teachers have always been engaged in "sense-making" work with students in the classroom. This is learning. Once they become comfortable sharing these same skills with other adults in the school, we begin to see the teacher as leader. This transition can be depicted as presented in figure 7.1.

Figure 7.1 Teacher as Leader



Many of the staff in the twinned schools became teacher leaders. In concluding this section it is appropriate to return to Rees and the Ontario experience by drawing attention to the importance of an ongoing evaluation process. It is important to ask regularly: What is sustainable related to a common vision and "free flow" reciprocal exchange of resources in the broadest sense? It is important to be responsive to changing conditions and situations that result from deliberate actions.

Recommendations

This study has provided the opportunity to bring theory together with practice. The principles that follow are described as "Tenets for Principals." These "tenets" represent my view of how this study can inform the general practice of principals.

Tenets for Principals

- Support and assist skill development in others, provide opportunities for growth.
- Be supportive and encouraging, celebrate successes publicly.
- Provide opportunities for staff to share expertise.
- Communicate openly, consistently, effectively, clearly and often.
- Make time to talk to staff personally about quality, philosophy and how "we" are going to move ahead.

- Accept ambiguity and take risks, learn to accept the actions of others guided by the same values, challenge traditional perspectives and be responsive to the initiative of others.
- Commit to a common purpose, define and keep site of the "lifeworld," avoid just becoming a bureaucrat.
- Understand and articulate with action, the support required for effective instruction. It is central to the capacity for leadership in a school or twinned setting. It represents the largest challenge in the process of leading staff to see they have opportunities for involvement that will support the school as a whole and build their own skills and play a significant role in high learning outcomes.
- Discover the link between shared leadership and student achievement that happens through a concerted effort to use data and information to gain insight and share meaning.
- For the benefit of students, keep "the main thing the main thing." Do not forget about the learning, the teaching, and the growth in achievement for students through all the adjustments that were required operationally. Every aspect of leadership and the involvement of others in the work of leadership needs to be directed toward the learning efforts central to the school's combined needs.
- Visioning and processes that create common purpose help create "substitutes" for leadership.
- Think, act and encourage team.
- Initial decisions – Making "one" operation, adopt a common sense approach, concentrate efforts through combining to the maximum, the elements of the two sites that work together as one. This is a discovery made by one individual and expressed by all.
- When teachers see "an action" is going to go somewhere, they take initiative.

- Collegial support develops efficacy in principals as they have opportunities to learn from each other, compare notes, adapt each other's ideas. Take the opportunity to test learning out on each other.

These tenets represent highlights of the principles from which the reader may draw their own insights as they apply them to their own leadership challenges. They apply to twinning but may also guide the actions of principals in single school operations. Leadership capacity and efficacy of the group of principals involved in this study was very high. They had clearly accepted, with enthusiasm, the expanded leadership experiences that twinning presented. The reflective process that they engaged in together allowed them to see their styles, preferences and make adjustments as they learned. They learned about collaborative efforts from each other and were each other's sources of inspiration as they shifted to a sharing of leadership at their own sites. The research demonstrates the importance of reflection. It needs to be ongoing and occur individually as well as among and with staff.

Further Research

This study has been exploratory in nature. There is considerable room for further investigations in the area of twinning as well as school leadership. Two suggestions that further the work of this thesis are briefly described below.

1. It would be interesting to pursue the research questions to this study but involve only teachers as participants. Perspectives on leadership are determined by the roles in the learning organization. Teachers have a different perspective of the work of leadership in schools. Discovering their insights could provide instructive direction for principals of twinned schools.
2. School districts are experimenting with a variety of choices in restructuring their schools. A study of leadership is such settings would be productive.

With respect to methodology, the "mixed" method of data collection, using semi-structured interviews followed up by a focus group session worked well for this study and should be considered for other similar studies. Also, continued exploration of the uses of qualitative analysis software as a tool for educational research is supported by this study.

Epilogue

The twinning served as a catalyst for the development and application of innovative leadership practice in schools. There were problems and barriers to overcome. Strong management skills, a common focus on student achievement, and a willingness to build trust in the actions of others contributed to the successes of each twinned school. The twinning project provides some awareness of the challenges for leadership in restructured settings and describes some of the ways principals took advantage of opportunities while operationalized their schools; sharing leadership and building team and developing vision. They remained committed to quality programming, progressive leadership, and success for students.

Many of the discoveries and strengths made by principals that were brought about by twinning may well apply to two single administrations. Other schools can capture the benefits of sharing resources and expertise, as modeled by the twinning project.

A Personal Reflection

The twinning project facilitated some of what is written about progressive leadership practice. As a result of the restructuring, others were required to take on leadership roles and make adjustments to become more self-reliant. A less hierarchical approach to leadership emerged where roles had to be redesigned to share responsibility and operate in a collaborative environment as a way of dealing with the challenges and demands of twinning. Principals became more the facilitator and partner rather than the "boss."

This progressive role adjustment did not come easily. Structural changes like twinning seem to create a tension not easily resolved. This study suggests that principals, as well as teaching staff, do not comfortably make the transition to a shared leadership model; it is an ongoing struggle. The challenge is complex. Cultural influences push the hierarchical perspective, even though the leader may focus on sharing and redesigning. I speculate on the benefits of twinning in this regard. Change was required and there were advantages in the muddling about, struggling to find solutions. Leadership capacity was introduced as a strategy and became the tool to help develop solutions.

For principals, this meant taking the opportunity to help teachers make the link between leading and learning and engendering a constructivist perspective, where leadership becomes a process of making meaning. This is achieved by creating the opportunity for people, committed to a common vision, to take initiative and be innovative.

There is tradition in all of us; perhaps the single most important challenge for principals and teachers is to let go of tradition and explore alternatives. Principals and their staffs involved in this project owe many of their successes to the risk-taking, the courage, and the trust to do just that. It requires the confidence to stand up, as principal and say, "I don't have all the answers, together we will discover them."

Being in the position of researcher and practitioner has accentuated the importance of on-going reflection. It has taught me the value of striving to be a responsive leader; to ask questions, listen, and communicate well while having a vision that embraces student learning. It has brought meaning to the importance of understanding the needs of the whole community; to value and pay attention to the perspectives of students, staff, and parents. They are valuable partners and play a crucial part in the process of building leadership capacity in schools.

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APPENDIX A

Scott Millar
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Information and Consent to Participate in the Twinning Leadership Study

Dear colleague,

Following our recent phone discussion, during which you agreed to participate in the study I am conducting about leadership in the "Twinning Project", I am requesting that you acknowledge your consent by signing this letter and returning it in the envelope provided. I am enclosing two copies so that you can keep one for your records.

As you are aware, I am conducting this research for my master's thesis on the district "Twinning Project" in which you and your staff are involved this year. The purpose of the study is to identify and explore strategies used by principals to involve staff in leadership roles. An emphasis on identifying alternatives in leadership practice will assist in examining the changing roles in the restructured organizational setting of this district initiative. As the district continues to investigate alternative organizations for schools, this research has potential to contribute significant insight into issues and ideas about leadership in schools.

As a participant in this study, you will be interviewed by me and will also participate in a focus group (group interview) with the other "twinned" principals participating in the study. The initial interview will occur in February at a time and location convenient to you. This will represent a mid-year position in the project. The focus group will occur at a year end point in early May. As a member of this focus group I ask that you commit to keeping all comments confidential. Both of these audio-taped sessions will occur within a one-hour period.

I will also ask that you identify a member of your professional staff that has accepted a leadership role as part of the twinning project and who you feel may be interested in participating in the study. I agree to hold this information confidential.

You may withdraw your consent to participate at any time during the study. This will be accepted without question or prejudice. Transcripts of all interviews will be returned to you so you may check their accuracy and identify errors, omissions, or concerns. E-mail or either of the telephone numbers listed above easily reaches me. In addition, you may contact my academic supervisor, Dr. B. Maynes at 492-3691.

Following the study, you will be provided with a summary of the findings, conclusions, and any recommendations. In this, as well as in the thesis, the name of your school and your name, will be altered to protect your anonymity. The data and analysis will be used in thesis preparation and potential presentations to other interested educators. There will be full disclosure and no intent of deception in any work or communication related to this research will occur.

Thank you for agreeing to participate in the study. I appreciate your generosity in sharing your time and insights. I hope that you find the process interesting and rewarding.

Sincerely,

Scott Millar

I, _____ acknowledge that I consent to participate in the study described above.

Signed: _____ Date: _____

APPENDIX B

Scott Millar
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[Date]
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Dear colleague, [teacher leaders]

Following our recent phone discussion, during which you agreed to participate in the study I am conducting about leadership in the "Twinning Project", I am requesting that you acknowledge your consent by signing this letter and returning it in the envelop provided. I am enclosing two copies so that you can keep one for your records.

As you are aware, I am conducting this research for my masters thesis on the district "Twinning Project" in which your school is involved this year. The purpose of the study is to identify and explore strategies used by principals to involve staff in leadership roles. An emphasis on identifying alternatives in leadership practice will assist in examining the changing roles in the restructured organizational setting of this district initiative. As the district continues to investigate alternative organizations for schools, this research has potential to contribute significant insight into issues and ideas about leadership in schools.

As a participant in this study, I will interview you. This interview will occur in February at a time and location convenient to you. This audio-taped session will occur within a one-hour period.. The planned set of questions for our discussion is attached for your information.

You may withdraw your consent to participate at any time during the study. This will be accepted without question or prejudice. Transcripts of the interview will be returned to you so you may check its accuracy and identify errors, omissions, or concerns. E-mail or either of the telephone numbers listed above easily reaches me. In addition, you may contact my academic supervisor, Dr. B. Maynes at 492-3691.

Following the study, you will be provided with a summary of the findings, conclusions, and any recommendations. In this, as well as in the thesis, the name of your school and your name, will be altered to protect your anonymity. The data and analysis will be used in thesis preparation and potential presentations to other interested educators. There will be full disclosure and no intent of deception in any work or communication related to this research will occur.

Thank you for agreeing to participate in the study. I appreciate your generosity in sharing your time and insights. I hope that you find the process interesting and rewarding.

Sincerely,

Scott Millar

I, _____ acknowledge that I consent to participate in the study described above.

Signed: _____ Date: _____

APPENDIX C
Interview Guide – Principal

1. Please provide a brief description of the demographics of your school, staff students.

   Probe: two campus details; What are your needs related to these demographics?
2. How do you view the way you have operationalized the principal's role as part of this district initiative?
3. How have you organized your time differently?

   Probe: Provide details; How has it changed or evolved as the year has progressed? Comment on how well it is going?:.
4. How do you lead differently now from when you were principal of one school?
5. What element of this project or initiative is most exciting to you? Most challenging?
6. What leadership opportunities are provided for your staff?
7. What are the issues that seem to have impact on working relationships with staff? Between staff?
8. What have been the most effective and the least effective support structures that have been put in place for you? for your staff? (that you have put in place)
9. Describe your approach to professional development with your staff.
10. From a professional standpoint, how have you changed or grown as a result of involvement in this initiative?
11. Is there anything else that you did not get a chance to say?

APPENDIX D

Pilot Study
Emerging Coding Frames and Categories

CODING FRAMES	CRITERIA FOR SELECTION
Change Process – Operational Models	1. Initial decisions / circumstances ▪ Introducing change ▪ Strategies for 'buy-in' ▪ Responding to needs ▪ Key decisions 2. Succession ▪ demographics
Leadership Growth	1. Efficacy ▪ dealing with unknowns 2. Self-reflection 3. Growth 4. Support
Building Capacity	1. A shift away from "HANDS-ON" leadership ▪ Team (building) ▪ "giving up" – traditional roles ▪ trust ▪ being visible 2. Decision-making ▪ Setting expectations ▪ Giving opportunity ▪ Teacher self-reliance ▪ Shared 3. Staff Collaboration 4. Staff Development ▪ Community building ▪ Common purpose
Operations –	1. Realities (the conditions) 2. Resource Distribution ▪ Advantages ▪ Financial 3. Strategies for organizing ▪ Complexities ▪ Communications ▪ using systems

APPENDIX E

Interview Guide Designated Leader

1. Describe your role on staff this year. What kinds of leadership opportunities have occurred for you?

2. How do you view the principal's role as part of this district initiative?

   - How would you highlight the difference in the principal role as you have experienced it this year?

3. What element of this project or initiative is most exciting to you? Most challenging?

   - What are some of the different opportunities that teachers have experienced?
   - How has the teachers' role changed this year?
   - What is required of you now that is attributable to the "twinning"?
   - What has changed since the beginning of the year?

4. What are the issues that seem to have impact on working relationships with staff? Between staff?

   - How has your staff changed over the year?

5. What kinds of support structures have been put in place for you? What is the district's role?

6. Describe the approach to professional development at this school? How is it different now?

APPENDIX F

Interview Guide – Focus Group

1. As you have worked to bring staff together purposefully, what strategies have been most successful? and why?

    Probes:

    1. What professional development opportunities have motivated and involved staff in meaningful ways?
    2. How has the principal role been instrumental or key to developing the vision of the school?

2. What are some of the changes in approach to your leadership?

    Probe:

    1. How have you grown?

3. As you reflect on this year's work, what insights have you gained that you will use in the future?

4. If this type of "twinned" organization were to grow in the district, based on your experiences this year, what suggestions or recommendations would you make?

    Probes:

    1. What are the optimal conditions?
    2. What are the barriers?

APPENDIX G

Interview Transcript - Sample

HU: **Thesis_Leadership**
File: [c:\my documents\research\atlas_primary\Thesis_Leadership]

P 4: No_7_Interview_Feb29_ES.txt [C:\My Documents\Research\Atlas_Primary\No_7_Interview_Feb29_ES.txt]
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1 Principal Interview Primary Document 4 (P4)
2 February 29, 2000
...

531 My role is to kind of smooth out and talk about what I think the
532 important principle is here, rather than making it a personality
533 issue. That really the goal is that we work together for student
534 achievement. We have something here that I believe seems to
535 have sound basis in making student achievement happen and
536 improve their writing specifically. Let's do that.
537 Scott: Do your curriculum coordinators play a role in the warming as it
538 is?
539 Tom: Yes. Very much so. Very much so. They work really well.
540 Because they are colleagues, they provide a lot of support to
541 teachers.
542 [End of cassette side one]
543 Scott: Okay. Sorry about that.
544 Tom: No problem.
545 Scott: The kind of support, because you're not physically there, they're
546 able to provide?
547 Tom: Yes, in terms of some of the curriculum support, ideas, strategies.
548 And quite often I will have conversations, you know, I will talk
549 with the curriculum coordinators and say, you know, they'll bring
550 up an issue and we will talk about it, and think about what
551 strategies might be working. And so then we in fact lay out
552 another strategy of how we're going to approach it and what might
553 be constructive things to do.
554 Scott: So they are confidantes with you? Part of your leadership team?
555 Tom: Yes.
556 Scott: Okay.
557 Tom: Yes, they are.
558 Scott: Switch gears a little bit and talk to me about what has been most
559 effective and least effective in terms of the support structures that
560 have been put in place for you.
561 Tom: Support structures within the district?
562 Scott: Yeah.

Tom: I have found the ITS department, specifically, to be really helpful in helping me with some of the communication issues related to computers and trying to streamline, get everyone on e-mail and those kinds of things. So they've been quite helpful and accommodating there. The work through central's special teams, special project coordinator, I think has been really helpful. And so our twinning project principals have been meeting together regularly and that has been an important kind of support, because we're able to talk about what we see as some of the issues from a base of understanding. Because when I talk to other colleagues, they're not, they just can't quite, don't related to some of the issues that we're dealing with.
Scott: Yeah.
Tom: So when I talk with Chuck, for example, about, you know, two small elementary schools and how we're doing, how we're handling it, we understand each other. With me because I can relate to the idea of traveling between the schools and parents wanting to see more of us, and we can't provide that, so what are the effective ways we can do that. For the most part I've found everyone to be quite, everyone downtown to be quite supportive, even though the most frustrating element has been that Kingston School has somehow become invisible within the district as a school, and needing to get two things out: one at Ryerson and whatever pieces...Well, for example, early on the superintendents' memo attachments, they would only go to Ryerson, but we needed to get them here as well. So it's a simple fix, but kind of indicative of clarifying that with staffing downtown. Some of the most challenging issues have been with Personnel, in that when we have to bring in a substitute teacher, for example, because we're all listed as one staff, Ryerson/Kingston School staff, teachers have to indicate in the message part that this is Kingston School location. Otherwise...
Scott: They end up going to Ryerson?
Tom: They end up going to Ryerson. And fortunately it hasn't happened with teachers, but it certainly has happened with recorders and things like that. So I'm not sure, I haven't put my creative thinking together for downtown and how they're going to handle that, because...(Laughter) I don't worry about it.
Scott: I get a sense that they're working with you, though?
Tom: Oh, very much.
Scott: Like evolving with you?
Tom: Yes. They've been very helpful and apologetic when things arise, and so we've had to sit down and say one solution, of course, is—and what I've communicated to the teachers here—please leave a message and indicate clearly what school you're at. You have to do that. There's just no...And they've been able to do it and so

609 that's smoothed some things over. No, they've been helpful.
610 Scott: Okay. Can you give me any examples beyond what you've
611 already alluded to in terms of support that you've put in place for
612 your staff?
613 Tom: We...I was in a very fortunate situation in that both schools had a
614 bit—not a bit—substantial surplus at both locations. What that
615 allowed me to do here at Kingston School was provide some
616 support for the teachers with three-way combined classes. Right?
617 Scott: Okay.
618 Tom: So we were able to hire some staff to take care of math and science
619 for the three/fours. So each of the teachers then were actually
620 teaching two combined grades for math and science, as opposed to
621 three. And that I think provided major support for the teachers
622 immediately. We were also able to provide part-time teacher
623 assistants to the Adaptation class, which had never been there
624 before. At Ryerson we had a library technician there for half-time
625 and what we were able to do then, by some minor reorganizing, we
626 brought in a full-time teacher assistant, of which some of her duties
627 were assigned to the library. Less that 0.5, but we were able to
628 keep the library up and functioning. So we gave some teacher
629 assistant time there. And we've been able to use our Thursday
630 dismissal times quite effectively in terms of professional
631 development and support there. And by giving time for
632 cooperative planning, individual planning a couple of Thursdays a
633 month, that was seen as really helpful and a constructive thing.
634 This school was not on early dismissal, Kingston School.
635 Scott: Right.
636 Tom: Up until this year anyway.
637 Scott: That's right.
638 Tom: And by having that time together that's been a really important
639 way for us to connect, for the school to connect.
640 Scott: Can you elaborate a little bit on your approach to professional
641 development? You've got the school-wide things happening. You
642 meet as a whole staff. What other elements are part of your
643 professional development plan?
644 Tom: The...Okay, well, I've kind of gone on about our school-wide PD
645 activities.
646 Scott: Yes.
647 Tom: Each of the teachers then in their annual growth plans talk about
648 areas that they want to, that they wish to address, in terms of their
649 own professional development. And so I've given them, portioned
650 out an amount of money that they then use and make their own
651 decisions about professional development activities.
652 Scott: Okay.
653 Tom: And so typically teachers have made decisions about areas they
654 want to improve in or gain more knowledge in.

APPENDIX H
Code List – Focus Group HU

HU: Focus_Group
File: [c:\my documents\research\atlas_primary\Focus_Group]
Code-Filter: **All**

A-Change in Role
A-Cultural Identity
A-Demographics
A-District Purpose
A-Initial Decisions
A-Interaction with Parents
A-Key Foliow-up decisions
A-Limitations
A-Recommendation
A-Resistance to change
A-Succession
A-Support Structures
A-Teacher Expectation
B-Collaboration
B-Efficacy
B-Focus on Vision
B-Growth and Development
B-Leadership Opportunities
B-Reflection
B-Relationships
B-Staff Development
Benefit
Bringing together
C-Away from Hands-On
C-Being Visible
C-Common Purpose
C-Giving Up Traditional Roles
C-Principal PD
C-Principal Role
C-Shared Leadership
C-Teacher Self-reliance
C-Team Building
C-Trust
C-Visioning
D-Administrative Demands
D-Communication
D-Resource Distribution
D-Sharing Resources
D-Support Structures
D-Systemworld Needs
Hesitation
Secondary Leader_OPP
Traditions
transportation solution

APPENDIX I
Code Table – by Primary Document

HU: Secondary_2

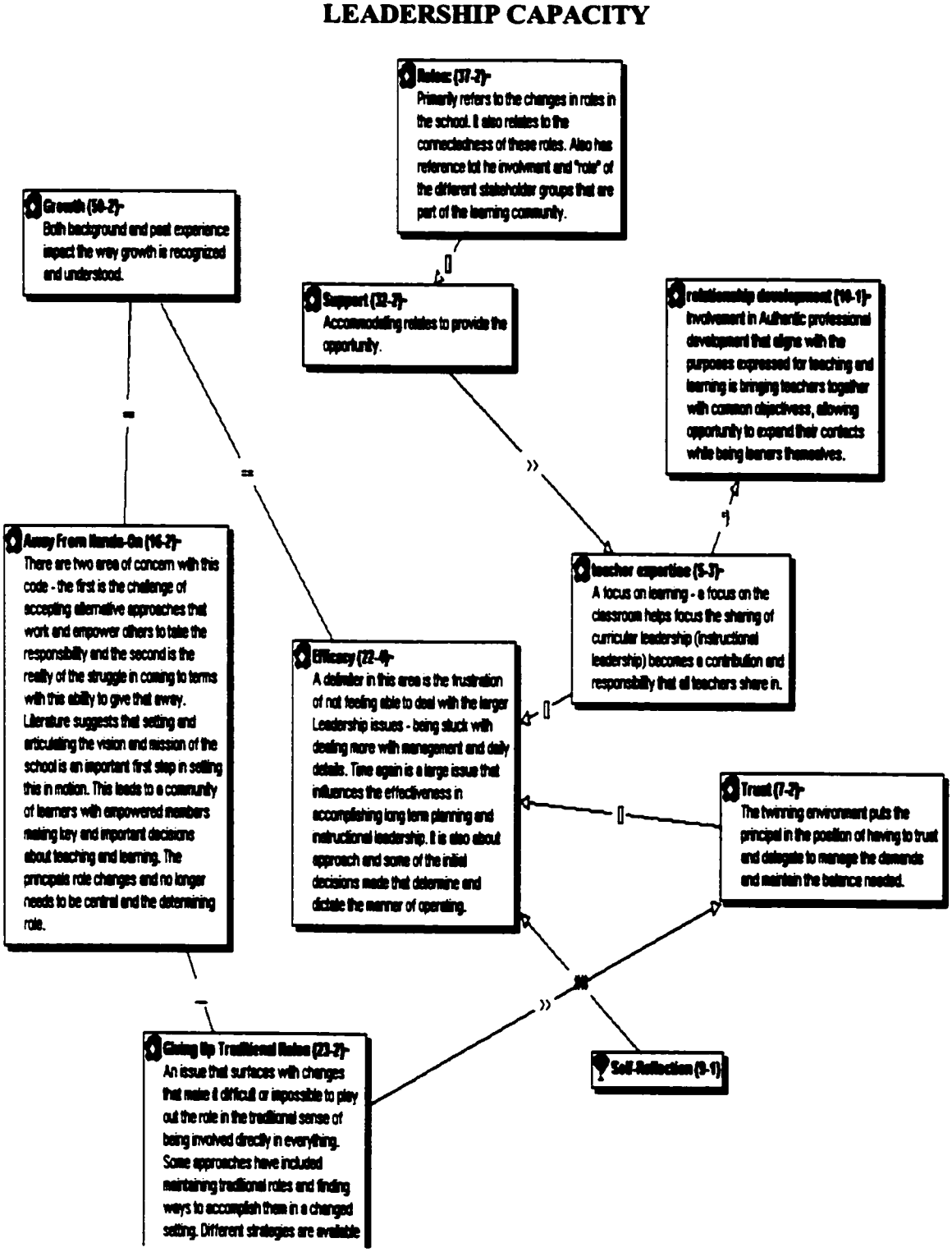
Codes-Primary-Documents-Table

Code-Filter: All
PD-Filter: All

	PRIMARY DOCS						
CODES	1	2	3	4	5	6	Totals
*1-Leadership Role &	1	0	1	0	4	2	8
*1-Teacher Role & 1-	0	0	2	1	1	0	4
*2-Leadership Opport	2	1	1	1	1	2	8
*Communication & 4-C	0	0	0	1	3	0	4
1-Change in Teacher	5	10	14	14	17	11	71
1-District Role	3	4	6	0	0	3	16
1-Leadership Role	6	6	20	8	24	14	78
1-Principal Role	9	18	16	19	16	13	91
1-Teacher Role	4	6	4	2	6	4	26
2-Expectations	7	4	6	5	11	5	38
2-Leadership Opportu	8	4	10	9	15	12	58
2-Requirements	1	7	2	1	11	3	25
3-Support Structures	2	8	9	5	10	5	39
3-Working Relationsh	11	14	4	11	15	12	67
4-Change and Growth	6	6	10	11	27	19	79
4-Professional devel	5	6	2	4	3	3	23
4-Reflection	1	3	1	3	7	7	22
Being Visible	0	0	0	3	0	0	3
Bringing Together	8	8	5	4	3	5	33
Building team	0	0	0	11	4	0	15
Change Process	2	5	5	12	8	0	32
Commitments	0	0	0	1	9	0	10
Communication	3	4	7	8	21	3	46
Daily demands	0	0	0	0	2	0	2
Dealing with Discipl	0	0	0	6	0	0	6
Decision Making	0	0	0	0	7	0	7
Demographics	0	4	5	4	1	0	14
Efficacy - Confidenc	4	0	2	2	11	2	21
Focus on Vision	0	0	0	2	7	0	9
Frustrations for Tea	0	0	0	0	1	0	1
Leadership Capacity	1	6	4	8	9	3	31
Negative Cost saving	0	1	0	0	0	0	1
Problems and Limitat	0	0	1	0	3	0	4
Resistant Attitudes	4	6	5	0	5	0	20
Resource Advantage	1	3	2	0	16	0	22
Sharing decision-mak	0	0	0	3	1	0	4
Sharing Leadership	0	0	3	16	4	0	23
Succession Issue	4	4	5	2	2	2	19
Totals	98	138	152	177	285	130	980

APPENDIX J

Network View – Code Family



APPENDIX K

Leadership Network View – Code Family

LEADERSHIP GROWTH