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Module One: Strong Districts and Their Leadership *A Broadly Shared Mission, Vision and Goals Founded on Aspirational Images of the Educated Person*

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Module Description *

This module focused on setting the process for developing a broadly shared mission, vision and goals founded on aspirational images of the educated person.

Strong districts have widely-shared beliefs and visions about student learning and well-being that have been transparently developed with the engagement of multiple school and system stakeholders. These direction-setting features of strong districts fall within the parameters set by the province. In these districts, the beliefs and visions held by members include a focus on raising the achievement bar, closing the achievement gap, and nurturing student engagement and well-being.

Strong districts:

- Ensure that a transparent visioning/direction-setting process is carried out;
- Consult extensively about district directions as part of the process;
- Spend sufficient time to ensure that the mission, vision and goals (directions) of the system are widely known, understood and shared by all members of their organizations;
- Articulate, demonstrate and model the system's goals, priorities, and values to staffs when visiting schools;
- Embed district directions in improvement plans, principal meetings and other leader-initiated interactions.

Agenda

1. Objectives

As a result of participating in this module, district leaders will improve their capacities to:

- Help create a set of district directions that are appropriate for their local communities, consistent with provincial educational goals and both ambitious and inspiring to all stakeholder groups.
- Create wide support for, and understanding of, district's directions among staff, students, parents and other community stakeholders.
- Engage elected officials productively in the development and mobilization of district directions.

2. Overview of Relevant Research

- [Power Point Presentation](#)

3. Case Study: Durham Catholic District School Board *

What can be learned from this case about how to build a broadly shared district mission, vision and goals?

- Discussion of written case (in teams of four or five people)
- Debriefing of what was learned from the written case by each team
- Synthesis of key findings

4. Case Study: District School Board of Niagara *

What can be learned from this case about how to build a broadly shared district mission, vision and goals?

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** indicates supplementary information since 2016*

- Discussion of written case (in teams of four or five people)
- Debriefing of what was learned from the written case by each team
- Synthesis of key findings

5. Case Study: Surrey School District (British Columbia)

What can be learned from this case study about how to build A Broadly Shared Mission, Vision and Goals Founded on Aspirational Images of the Educated Person?

- Discussion of the written case study (in teams of four or five people)
- Debriefing of what was learned from the written case study by each team
- Synthesis of key findings

6. Case Study: Algoma District School Board

What can be learned from this case study about how to build A Broadly Shared Mission, Vision and Goals Founded on Aspirational Images of the Educated Person?

- Discussion of written case study (in teams of four or five people)
- Debriefing of what was learned from the written case study by each team
- Synthesis of key findings

7. Case Study: Dufferin-Peel Catholic District School Board

What can be learned from this case study about how to build A Broadly Shared Mission, Vision and Goals Founded on Aspirational Images of the Educated Person?

- Discussion of the written case study (in teams of four or five people)
- Debriefing of what was learned from the written case study by each team
- Synthesis of key findings

8. Case Study: Sudbury Catholic District School Board

What can be learned from this case study about how to build A Broadly Shared Mission, Vision and Goals Founded on Aspirational Images of the Educated Person?

- Discussion of the written case study (in teams of four or five people)
- Debriefing of what was learned from the written case study by each team
- Synthesis of key findings

9. Full group discussion

- Compare and contrast contexts for setting directions in the case study districts.
- How does the research summarized in 2 (above) relate to or inform these district cases?
- Key lessons: what to do for sure, what not to do at any cost?

Samples of Relevant Research

- Berson, Y., Halevy, N., Shamir, B., Erez, M. (2015). Leading from different psychological distances: A construal-level perspective on vision communication, goal setting and follower motivation, *The Leadership Quarterly*, 26, 143-155.
- Bitter, C., Taylor, J., Zeiser, K., Rickles, J. (2014). Providing Opportunities for Deeper Learning: Findings From the Study of Deeper Learning: Opportunities and Outcomes, American Institute for Research (September)
- 21st Century Skills, Center for 21st century skills, Education Connections (355 Goshen Road, PO Box 909, Litchfield, CT 06759)
- Ontario Ministry of Education (2014). *Achieving Excellence: A Renewed Vision for Education in Ontario* (April)
- Yettick, H., Brounstein, K. (2014). Benefits of 'Deeper Learning' Schools Highlighted in Studies: Students did better in and out of class, *Education Week* (September 30).
- Zeiser, K., Taylor, J., Rickles, J., and , M. (2014). Evidence of Deeper Learning Outcomes: Findings from the Study of Deeper Learning: Opportunities and Outcomes. *American Institute for Research* (September).

Appendix A: Durham Catholic District School Board *

Guiding Questions

This case first describes what this district did to create a broadly shared mission, vision and goals, the focus of this module (it also provides an account of its approach to leadership development, the topic of Module 6). The context for the work on mission, vision and goals was a desire by the board to renew its focus at the time of the appointment of a new director of education and several new superintendents. Durham Catholic engaged in an extensive consultation process prior to beginning their strategic planning process. From this, themes emerged and a committee was struck.

1. *Using Durham's example, what are the merits and potential pitfalls with this level of consultation?*

After watching Durham Catholic's video, it is evident that Durham Catholic took an innovative approach in the sharing of their strategic plan through face-to-face meetings and also through the effective use of technology.

2. *What experiences have you had in successfully engaging your system in the sharing and input towards a plan?*
3. *What new innovations have you adopted to ensure robust communication and sharing has occurred?*

Case Study

Appendix B: District School Board of Niagara *

Case Study

Appendix C: Surrey School District: Refreshing Our Vision and Refocusing Our Leadership Capacity: A Surrey Story

Guiding Questions

Surrey School District is in British Columbia and so functions in a context different in important respects from the contexts in which Ontario districts find themselves. This case was written by the Superintendent (CEO or Director) of Surrey in the early stages of his tenure.

British Columbia has introduced significant reforms in its' schools' and curriculum expectations are now focused on key competencies and big ideas.

1. *How does Surrey School District's overall approach to clarifying its mission and vision compare to processes you have used in your district?*

To ensure clarity in its' leadership approach, Surrey School District embraced the practice of executive coaching and the work of Marshall Goldsmith. Goldsmith has a six question executive coaching framework that calls for multiple meetings a year with direct reports focusing on alignment between the organization and between individuals; these

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meetings also invite individuals to identify what they need from the superintendent to support their own leadership.

2. *What is your reaction to the use of this coaching model in Surrey School District and how does it compare to the strategies used in your system to ensure that there is clarity in leaders' work?*

Surrey School District has adopted the use of electronic portfolios for each member of the senior team so that they can access responses from the system, and have a chance to provide further reflections and comments. The electronic portfolio also allows them to add to the portfolio anytime, anywhere.

3. *What was your reaction to the use of technology in this way and what impact do you think this may have? Would there be some use for it in your own district?*

Case Study

Appendix D: Algoma District School Board

Case Study

Appendix E: Dufferin-Peel Catholic District School Board

Case Study

Appendix F: Sudbury Catholic District School Board

Guiding Questions

Sudbury Catholic District School Board began to undertake a mission and vision process at same time a new Director of Education had been appointed. There had never been a plan in place prior to this.

1. *How does Sudbury Catholic District School Board's process compare to the experiences you have had in your district? Please discuss the similarities and differences to the current reality in your district.*

The role of the trustees in the strategic planning process and the multi-year planning process was highlighted in the Sudbury Catholic District School Board case.

2. *How do your district's experience in engaging trustees in the strategic planning process and the multi-year plan compare with Sudbury Catholic District School Board?*

The Sudbury Catholic District School Board case study was an example of having a strategic plan developed but also re-visiting and renewing it after a 5-year time period. This case also outlines lessons learned.

3. *What has been your experience with renewing your strategic plan and what lessons learned did you take from this experience?*

Case Study

Further Thoughts About What We Learned: Dr. Kenneth Leithwood *

Participants from the twelve (12) districts attending this module responded to a summary of research on effective leadership networks and presentations by members of two districts about their approaches to fostering learning-oriented improvement processes in their districts. Five issues stood out as a result of listening to participants' reflections on the meaning of the research and district cases for work in their own districts.

1. Learning as the residue of action

Understandably, most of us involved in an improvement effort in districts or schools have important but relatively immediate goals we want to accomplish as, for example, improving our students' math performance, reducing bullying, and increasing the achievement of particular groups of students. But it is important to remind ourselves that, once we have accomplished or made significant progress toward achieving these proximal goals, there will be new goals to challenge us.

Because the improvement process in schools never ends, we need to approach each of our improvement cycles with the intent of both accomplishing the immediate set of goals and becoming more skilled for tackling the next set. One way this can be done is to use the end of an improvement cycle as a time, with your colleagues, to reflect on just what you actually ended up doing (which might be quite different from what you originally planned to do). This reflection should include identifying and codifying what it was that moved the improvement effort forward, what turned out to be not especially helpful, and what you did that might, with some adaptations, be helpful in subsequent improvement cycles. Repeated cycles of such codified reflection will make the organization increasingly smarter about how to improve itself. It is a "pulling yourself up by your own bootstraps" strategy for learning, one that helps emancipate you from the tyranny of others' prescriptions for change.

2. Infrastructures for improvement

An infrastructure for improvement consists of stable, well-defined structures and processes that make improvement efforts easier and more predictable, thereby improving the chances for success and reducing the costs of change. These structures and processes

(also objects for improvement) should be designed to weigh the value for the organization of proposals for change from outside the organization, assess the need for change from inside the organization, establish priorities for change and both plan for and manage improvement processes. Well-designed infrastructures for change greatly increase the chances of learning from past efforts when they routinely bring organizational members together for purposes of problem solving. Networks hold considerable potential as part of a district's improvement infrastructure.

3. Theories of action

Until quite recently, approaches to school and district improvement planning consisted of not much more than variations on standard needs assessment processes; many still are. While widely adopted, such approaches to improvement have not actually resulted in much improvement. Part of the reason for this lack of impact has been the struggle involved in identifying and collecting the types of evidence needed to track progress and provide useful feedback about what is working as intended and what seems not to make a difference. The use of "theories of action" to guide improvement initiatives (touched on in the Waterloo Catholic District School Board case study) is a deceptively powerful alternative to these more traditional improvement planning processes, partly because of the solution it offers to the evidence problem.

The string of "if-then" claims typically constituting a theory of action push improvement planners to be explicit in some detail about the actions they propose and what each of those actions will accomplish. Theories of action also encourage planners to provide justification for their proposed actions, potentially encouraging more use of systematic evidence for such justification. Well-developed theories of action press improvement planners to frame their proposed actions as hypotheses that can be tested with action-relevant evidence. The hypothesis-driven nature of the evidence identified by a theory of action offers considerable guidance to those leading organizational improvement efforts, such guidance largely missing from the more common approaches to district and school improvement.

4. Inquiry processes

Much of the conversation in and about networks is framed as a process of inquiry, as are broader discussions about the nature of professional collaboration. In the face of such attention to inquiry processes, it is important to remind ourselves that evidence about the outcomes of inquiry is generally quite disappointing. John Hattie's synthesis of this evidence in his book *Visible Learning* is a compelling source of this evidence collected in many different contexts. Closer to home, LSA's annual evaluations for many years included an examination of the relationship between "collaborative inquiry processes", as they typically took place in LSA schools, and EQAO evidence about student achievement in math and language. Those evaluations never found the relationship between student achievement and collaborative inquiry to be either statistically significant or practically meaningful.

The conclusion to be drawn from evidence of this sort is not, however, that inquiry does not work; it is that for inquiry to produce the results we hope for, some key conditions have to be in place. These conditions are just as important for productive inquiry among our colleagues in networks, for example, as they are for students in our classrooms. The knowledge-building work of Marlene Scardamalia and Carl Bereiter, now one of the two main priorities of the LSA project, is arguably the most concise and comprehensive source of such conditions (12 in total¹). Productive inquiry does not come naturally. It requires encouragement in one form or another, for example, to make constructive uses of authoritative sources, value and build on idea diversity among members, to take collective responsibility for improving the knowledge of the group and to continually work with colleagues to take collective understandings to a new level. An additional source of evidence about conditions needed to support productive inquiry can be found in a recent meta-analysis by Lazonder and Harmsen².

5. Source of relevant pedagogical content knowledge for “going deeper”

Much of the inquiry underway in our networks and schools at the present time is aimed at “going deeper.” In classrooms, going deeper means students acquiring more complex and meaningful understandings of curriculum content. In networks such as PLCs and PLTs, going deeper often means determining what types of instructional practices will assist students to go deeper. Of course, students’ math achievement is often the focus of these efforts to go deeper.

One of the most important questions presently confronting school and district leaders is about who in the organization has enough deep knowledge themselves to lead others aiming to deepen their own knowledge. Our conversation during the module was specifically about deep *pedagogical content knowledge* – expert-like knowledge about whatever is the curriculum content of interest, in combination with expert-like knowledge about effective ways helping students acquire such knowledge.

Much of this conversation during the module entailed weighing the advantages and disadvantages for secondary schools of identifying department heads as key holders of deep pedagogical knowledge in their disciplines and so promising leaders of efforts at helping others improve their own knowledge. One of the advantages, supported by a recent review of research³, was that department heads in many contexts turn out to be more effective leaders of change in secondary schools than are principals or vice-

¹ For example, see Knowledge Building 12 Principles, Adapted from the work of Dr. Marlene Scardamalia and Dr. Carl Bereiter by Dr. Monica Resendes for the Leading Student Achievement project, September 2014.

² Lazonder, A., Harmsen, R. (2016). Meta-analysis of inquiry-based learning effects of guidance, *Review of Educational Research*, 86, 3, 681-718.

³ Leithwood, K. (2016). Department head leadership for school improvement, *Leadership and Policy in Schools*, 15, 2, 117-140.

principals. But this advantage, we noted, depended on department heads in our own district contexts having both the leadership capacities and opportunities required to be effective leaders of change.

We agreed (a) that in many districts, the department head position has been “downgraded” by the loss of stipends and time, (b) in some districts, in spite of the loss of stipends and time, there are department heads who are providing such leadership, (c) the existence of a well-established position may make it easier to resuscitate the contributions of those in the role than ignoring the position and creating alternatives for leading and (d) when the challenges of having department heads provide leadership seem insurmountable, awarding leadership to other teachers with the needed expertise may be an effective alternative. We also heard that, in some districts not now providing department heads with stipends and time, all was not lost; future changes could add strength to the role.

Appendix G: Knowledge Building Principles and Knowledge Forum Supports: Making Principles Transparent

| Knowledge Building Principles | Knowledge Forum Supports |
|--|---|
| <p>1. <i>Real Ideas and Authentic Problems.</i> Students identify problems that arise from their efforts to understand the world and pursue sustained creative work surrounding them.</p> | <p>Notes and views serve as direct reflections of the core ideas and work of the community; problem statements and scaffolds highlight unsolved problems, promising ideas, and other high-level knowledge objects.</p> |
| <p>2. <i>Improvable Ideas.</i> Ideas are treated as improvable rather than simply accepted or rejected; students work continuously to improve the explanatory power, coherence, and utility of ideas.</p> | <p>Note revision and scaffolding enhance theory development and discourse for idea improvement; background analytic tools and feedback support idea revision and the monitoring of coherence among ideas.</p> |
| <p>3. <i>Epistemic Agency.</i> Students set goals, assess their work, engage in long-range planning, monitor idea coherence, use contrasting ideas to spark and sustain knowledge advancement, and engage in high-level knowledge work normally left to the teacher.</p> | <p>Analytic tools support reflection on individual and group progress; co-construction and refinement of theories is supported by viewing ideas in multiple contexts; scaffolds encourage the use of epistemological terms (e.g., <i>conjecture</i>, <i>wonder</i>, <i>hypothesize</i>) and growth in conceptual content.</p> |
| <p>4. <i>Collective Responsibility for Community Knowledge.</i> All participants are legitimate contributors to community goals and take high-</p> | <p>Open, collaborative workspaces encourage the production and refinement of conceptual artifacts; reading, building on, and linking notes and views help</p> |

level responsibility for advancing the community's knowledge, not just for their individual learning.

ensure that these artifacts are informative and helpful for the community; social and semantic networks and other visualizations support reflection.

5. *Democratizing Knowledge.* All participants are empowered as legitimate contributors to the shared goals; all take pride in knowledge advances of the community. Diversity and divisional differences are viewed as strengths rather than as leading to separation along knowledge have/have-not lines.

Multimedia facilities provide a way into shared problem spaces for all participants; analytic tools provide feedback to allow participants to achieve greater evenness of contributions and distributed, collective engagement.

6. *Idea Diversity.* Knowledge advancement depends on the diversity of ideas, just as the success of an ecosystem depends on biodiversity. To understand an idea is to understand the ideas that surround it, including those that stand in contrast to it.

Linking and rise-above facilities bring different combinations of ideas together in different notes and views; semantic analysis and visualizations convey the diversity and connectedness of ideas.

7. *Rise Above.* Students work with diverse ideas in complex problem spaces; they transcend trivialities and oversimplifications and work toward more inclusive principles and higher level formulations of problems.

Rich intertextual and inter team notes and views support emergent goals and workspaces; revision, build-on, reference, and annotation further encourage participants to identify shared problems and gaps, interweave peer input, and advance understanding beyond the level of the most knowledgeable individual.

8. *Constructive Use of Authoritative Sources.* Participants access and critically evaluate authoritative sources and other information. They use these sources to support and refine their ideas, not just to find “the answer.”

9. *Pervasive Knowledge Building.* Knowledge Building is not confined to particular occasions or subjects but pervades mental life—in and out of school and across contexts.

10. *Symmetric Knowledge Advance.*
Expertise is distributed within and between communities and team members, with knowledge exchange and co-construction reflecting the understanding that “to give knowledge is to get knowledge.”

11. *Embedded and Transformative Assessment.* Assessment is integral to Knowledge Building and helps to advance knowledge through identifying advances, problems, and gaps as work proceeds.

12. *Knowledge Building Discourse.*
Students engage in discursive practices that not only share but transform and advance knowledge, with problems progressively identified and addressed and new conceptualizations built.

Self-assessment

In order to assist you with your learning, use a rating scale in response to the following: (1 = not at all, 2 = a modest amount, 3 = significantly, 4 = a great deal)

Please indicate the extent to which you feel that participation in this module has extended your ability, or increased your awareness of the need, to address the following challenges associated with the creation of a widely shared vision, mission and set of improvement goals for your school district:

1. Help create a set of district directions that are appropriate for their local communities, consistent with provincial educational goals and both ambitious and inspiring to all stakeholder groups;
2. Identify key goals for students that should be addressed by any district;
3. Create wide support for, and understanding of, district's directions among staff, students, parents and other community stakeholders;
4. Engage elected officials productively in the development and mobilization of district directions.

Evaluation:

1. If your participation in this module has caused you to consider doing something different in your own system, please describe what that is.
2. Please identify any changes or refinements that could be made to this module that would improve participants' learning.
3. How can this work best be used with others in the future?

The Ontario Institute for Education Leadership (IEL) invites you to share your responses to the above questions with the coordinator of the IEL at communication@education-leadership-ontario.ca.