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**A Comparison of Educational Leadership in Islamic and Western Countries  
and a Suggestion of a Model for a Global Society**

**by Sirous Tabrizi**

**A Dissertation  
Submitted to the Faculty of Graduate Studies  
through the Faculty of Education  
in Partial Fulfillment of the Requirements for  
the Degree of Doctor of Philosophy at the  
University of Windsor**

**Windsor, Ontario, Canada**

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A Comparison of Educational Leadership in Islamic and Western Countries  
and a Suggestion of a Model for a Global Society

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**Author's Declaration of Originality**

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### **Abstract**

For a global society to function well its members need certain attitudes, such as a desire for cooperation, mutual understanding and respect, as well as continuous and self-motivated learning. A model of education is needed that engenders these attitudes such that students critically understand these attitudes instead of passively accept them. This kind of education requires leadership that agrees with, and engages in, the same attitudes.

This dissertation proposes a model of educational leadership for a global society, and presents an exploration and comparison of public high schools across three countries: Canada, Turkey, and Iran. The proposed model consists of three interrelated dimensions: leadership style (transformational leadership and high leadership delegation), organizational structure (highly ranked Learning Organization structure that is more horizontal than vertical), and approach to learning (an active learning approach that utilizes critical pedagogy). The schools were explored in terms of: their current practices and policies in the three dimensions, how well they ranked in those dimensions relative to the proposed model, and what obstacles exist for implementing the proposed model. A case study methodology was used in which 15 participants (5 per country) at different organizational levels (students, teachers, and principals) were interviewed to gather their opinions. The interview questions were organized by the three dimensions and followed the INVEST framework for Learning Organizations.

The results of this research indicated that, although the Canadian school ranked the closest to the proposed model and the Iranian school ranked the furthest, all three schools had problems. None of the schools used transformational leadership, though the Canadian teachers were the most interested in doing so. The Canadian leaders (teachers

and principal) seemed to have a high level of leadership delegation (5 or 6 out of 7), but the students' comments suggested otherwise. The Iranian and Turkish leaders' commented suggested a low level of delegation (3 out of 7) in which they made decisions with little input from others, except to indicate what their decisions were. All of the schools had a vertical organizational structure with almost the same hierarchical levels, but the Iranian school was the most hierarchical and inflexible. The Canadian school ranked the highest as a Learning Organization and the Iranian school ranked the lowest, but the most common score was 3.5 out of 9. The Canadian and Turkish students were both highly ranked as motivated to learn, but it seemed largely due to family support. All of the principals were convinced that their school had a clear vision of its goals, but none of the teachers and students knew this vision or agreed that a vision existed. Lastly, active learning was performed at a minimal amount and none of the schools engaged in critical pedagogy; all of the teachers liked brainstorming and teamwork as active learning techniques, but only the Canadian teachers engaged in them regularly and the Iranian teachers explicitly complained that they were unable to use teamwork in their classes.

From these results none of the studied schools followed the proposed model, and missed many opportunities to prepare their students for a global society. However, this was often due to structural problems and not lack of knowledge or interest. For example, the teachers liked active learning and wanted to use it but gave reasons why they were unable to (e.g., Turkish teachers did not want to compromise the hierarchy, Iranian teachers were working two or three jobs due to low salary and worried that 'critical pedagogy' was too threatening to the government). As such, gradual changes are likely needed to move the schools towards a more global model of educational leadership.

**Dedication**



**Mawlana Rumi (1207 – 17 December 1273):**

*All day I think about it, then at night I say it.  
Where did I come from, and what am I supposed to be doing?*

I would like to dedicate this dissertation to the three professors who have guided me greatly in my graduate education:

Dr. Glenn Rideout  
Dr. Jerry Paquette  
Dr. Ali A. Farhanghi

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Many people have supported and encouraged me throughout the process of writing this dissertation. I would like to especially thank my mother, and my friends: Dr. R. Haworth, Dr. H. Tutunchi, Mr. D. Bagheri, Dr. M. Kabirnejat, Dr. S. Rohani, Mr. D. Jabbarzadeh, Mr. S. Weissberg, Mr. S. Abbasi, Mr. R. Bozourghi, Mr. B. Moharrerzadeh, Ms. F. Kusar, Ms. N. Serin, Mr. A. Mahkam, Ms. M. Turkalj, and many others.



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**Chapter One: Introduction**

The world is becoming more socially, economically, politically, and culturally interconnected, to the point where the term ‘global society’ may be used. Such interconnectedness can often lead to prejudice, tension, and conflict as diverse groups of people interact in new, powerful, and often unequal methods. Cooperation and mutual respect can be encouraged to avoid potential conflict, since attitudes can facilitate peaceful and productive interaction among people such that their society can grow and flourish (Chang, 2010). Education is often presented as a powerful tool for reducing the likelihood of conflict (Harris, 2008). However, to reduce the tension and potential for conflict resulting from increasing diversity in a society, it may not be simply education that is needed, but rather societal institution including education that encourages cooperation, mutual respect, and intercultural understanding (Chang, 2010; Mundy, 2008; UNESCO, 2013). Yet, even if this kind of education is necessary, how can such a statement be empirically studied or explored for the context of the whole world (i.e., the ‘global society’)?

A high degree of interconnectedness is often a defining feature for a ‘global society,’ but ‘global society’ can also be defined as a society that is highly diverse, and whose people realize the importance of respect for that diversity, cooperation, and mutual support (Spring, 2014). Such a definition allows contexts smaller than the whole planet, such as a single, highly diverse country, to be examined in order to better understand theories, models, and policies that may be beneficial for the broader setting. In other words, studying the situation within highly diverse countries (i.e., small ‘global



societies’) can inform the development of models for the world (i.e., the larger ‘global society’).

To promote education that functions within, and supports, a global society there needs to be leadership that also function within, promotes, and supports the necessary attitudes for such a society. In other words, there needs to be leadership that promotes education that recognizes diversity and the need for mutual collaboration and cooperation (Spring, 2014). However, many different styles of leadership could potentially be used; but how well a particular style of leadership provides an education that fosters such global values is poorly understood. While it is possible that a new style (or styles) of leadership may need to be developed in order to foster such values, it is also possible that existing styles would be just as effective. Although a single country could be conceptualized as a microcosm of a global society (i.e., that country is diverse and provides education that promotes cooperation among its own groups of people), it would be better to explore leadership appropriate for any country; in this way, the leadership model would be applicable regardless of the country and would support a growing global society composed of many countries throughout the world. Since the countries of the world are quite diverse, the exploration of leadership should likewise contain a diversity of views across cultures and time.

However, an examination of leadership, either in theory or in practice, would be incomplete without considering contextual factors that may influence the implementation of leadership. For example, a leader may want to regularly gather feedback from others in the group but has difficulty doing so because various policies prevent such communication from occurring. A principal may want to hear from the students of her

school, only to realize that board policy prevents her from talking to students directly; she must ask the teachers to gather this information first. In other words, the organizational structure of the school--whether it is highly vertical, requiring intermediaries for communication and decision making, or highly horizontal, where responsibilities are spread out over the group (Cruz-Cunha, 2010) may influence how leadership actually occurs within a particular school. In a global context, where a diversity of opinions may need to be considered, and potentially vastly differing views resolved, how communication and influence is distributed through an organization may impact the style of leadership that occurs.

Similarly, the capacity for adaptation to change that has been incorporated into the structure of an organization may also influence the style of leadership that can operate within that organization. For schools, adapting to change may take the form of encouraging individual learning or personal growth (e.g., the school is a learning organization; see Senge, 1990), or emphasizing creativity instead of knowing content (e.g., classroom management practices that encourage a transformational instead of transactional style of management; see Lussier & Achua, 2015). For education in a global context, encouraging behaviours and attitudes conducive to handling change may be quite useful. As such, the degree to which the leadership of a school agrees with adapting to change, and whether some kinds of adaptation are actively encouraged, is another contextual factor to consider.

### **Problem Statement**

The purpose of this research was to explore educational leadership that has been theorized or used in various countries and cultures in terms of three dimensions

(leadership style, organizational structure, and approach to learning) so as to identify a model for educational leadership that is appropriate for a global society. In particular, theories from a Western secular perspective will be compared against those from an Islamic background in the Middle East, and the practice of different leadership styles will be explored in schools of three countries: Canada, Turkey, and Iran.<sup>1</sup> As such, certain questions need to be explored in order to understand this topic more fully. Therefore, this research seeks to explore the following seven research questions:

1. What leadership styles are used in the public education systems of the studied countries? (i.e., are the school leaders using a transactional or transformational leadership style?)
2. To what degree are these leadership styles authoritative or cooperative, as measured by the Tannenbaum and Schmidt model (Tannenbaum & Schmidt, 1973)?
3. Are the organizational and educational structures of the education systems of the studied countries more vertical (i.e., top-down or hierarchical) or horizontal (i.e., team-based) in nature?
4. To what degree are the schools in the studied countries learning organizations, as measured by the INVEST model (Pearn, Roderick, & Mulrooney, 1995)?
5. What approaches to learning are in use? (e.g., do the methods encourage personal growth? Do they instead encourage conformity? Or adapting to change?)
6. If a school is using a leadership style, organizational structure, or approach to learning that is maladaptive for a global society (e.g., the style promotes inherent superiority of one group over another, or highly centralized decision-making, or

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<sup>1</sup> The reason for choosing these countries is explained in Chapter Three. Briefly, it is because these countries provide a mix of Western and Islamic contexts and are also sufficiently diverse societies in which the practice of various leadership styles can be explored.

- uncritical conformity to one group's ideology) then what are some factors that could prevent or delay changing to a more adaptive style?
7. What could be an appropriate model for educational leadership for a global society? (i.e., what leadership style, organizational structure, and approach to learning could work best for education in a global society)

The method by which these research questions were investigated is described in detail in Chapter Three. Briefly, RQ2, RQ3, and RQ4 used specific instruments for measuring the state of the studied schools, while RQ1, RQ5, RQ6, and RQ7 involved comparing the actual situation of the studied schools to possible methods mentioned in the literature (e.g., question 1 compares leadership styles actually used to many possible ones that could be used). The instruments and possible methods used for investigation or comparison are briefly described in Chapter Two. Later chapters contain data, interpretations, and analysis corresponding to these questions. In particular, RQ1, RQ2, RQ3, and RQ4 are discussed in Chapter Five while RQ5, RQ6, and RQ7 are discussed in Chapter Six.

### **Purpose of this Research**

The ultimate objective of this research is to conceptualize a model for educational leadership appropriate for a global society. Such a model might include: leadership styles adaptive for a global society, and promotes the attitudes and values necessary for a stable global society; organizational structures that support this style; management that supports this model in the classroom and the education system overall; and an approach to learning that teaches any content necessary for the curriculum in a manner consistent with the leadership style and organizational structure.

Although any model needs to take into account the theories that would promote this global approach, it is important to understand what is currently in use and why; despite the theoretical superiority of one approach, it may be impossible to implement it given the prevailing situation within schools. Thus, the first five research questions explore the current setting of education so that this information can be compared against current theories of leadership. The next step would be to identify what changes might be needed in both Islamic and Western countries in order to implement a new leadership model (i.e., determine what changes are needed to properly use, teach, and support this leadership style, organizational structure, and classroom management methods). Again, the first five research questions will help identify potential changes, while the sixth question will explore any necessary changes in more detail. Therefore, attempting to answer the first six questions will, at least, create the foundation necessary to conceptualize and suggest a model for educational leadership for a global society (i.e., the first six questions will help to answer the seventh question).

Furthermore, this research attempts to implement global competence in its approach. One aspect of global competence is “the capacity to analyse global and intercultural issues critically and from multiple perspectives” (OECD, 2016) so as to better understand the different ideas people have of themselves and others. Thus, the global model would need to be informed through perspectives from a diversity of cultures. Although a full approach to global competence would involve many cultures, such an approach was impractical in the context of this dissertation and would be better suited for future areas of research. However, the three countries chosen in which to conduct this research are examples of diverse cultures, both in terms of being different

from each other and themselves being multicultural countries. Thus, by conducting this research in three countries, and allowing participants from each culture to express their ideas, values, and opinions without needing to conform to the norms of the researcher's culture or perspective, this research is able to implement global competence.

### **Significance of this Study**

It could be suggested that the best model for educational leadership in a global society would be to use the dominant or most common style. However, there is no evidence suggesting which style is dominant or most commonly used across the world. Although it could be argued that the Western approach to leadership in education is the dominant one, given the dominance of Western culture and politics on the global stage, this says little about whether the Western approach would actually be appropriate for a global society. Does the Western approach to leadership promote the cooperative attitude necessary for a stable global society? Would the Western approach work the same when directly applied to different cultures, such as countries in the Middle East? Likewise, it could be the case that a leadership style used in some completely different culture may actually be more effective for promoting this cooperative attitude. Perhaps the leadership style used in Middle Eastern countries would be better. The point is that there is no evidence to say whether any currently used leadership styles would be appropriate for educational leadership for a global society.

Furthermore, the current forces of globalization are changing the relationships between countries and people in a way that is unique in history in terms of scope and complexity; leadership styles that would be appropriate to such a context are still under-researched. Organizational structure and management of schools is critical but leadership

has the capacity to push for change in both of these areas; this makes leadership style a very important factor to consider. Thus, one of the main goals of this research is to better understand what leadership styles would be appropriate to use in the education system to produce a more cooperative, stable, and harmonious global society and explore the circumstances within the education system of various countries that may be more or less conducive to such leadership styles.

### **Situating the researcher within the research**

Due to my background as a university-level instructor for many years, and my experiences in the Iranian education system, I believe that there are many problems within education. After spending some time in Canada, it became clear to me that although its education system is better, there are also some problems with it. Furthermore, it seemed that a single approach to education may not be effective since local differences need to be properly respected and understood. For example, in the Iranian education system all classes need to be taught in the Persian language, even though many students in different parts of the country do not speak Persian as their first language (i.e., their parents, surrounding relatives, and friends regularly and prefer to speak in a language other than Persian). Research that I conducted on this problem suggested that being forced to learn in languages other than their first language negatively affected students' ability to learn and may lead students to drop out of school (Tabrizi, 2013). Since the Iranian education system, at least in this topic, did not respect local diversity then it harmed the overall effectiveness of the system and resulted in many students not learning well or outright leaving school.

Since my academic background is in management, I believed that incorrect leadership was a major factor for such problems in the Iranian education system.

Likewise, I assumed incorrect leadership could also be a factor for problems in other education systems. I initially thought the leadership used in Canada would be good, and started exploring differences between Western leadership (i.e., leadership used in Canada) and Islamic leadership (i.e., leadership used in Iran and Turkey) in the context of education. However, it soon became clear that this initial research was too limited, since it only looked at a few aspects of leadership. Topics in leadership needed to be connected to research about organizational structure and approaches to teaching and learning. Furthermore, the topics needed to be connected in a way that would lead to a global approach such as a leadership model that would take into account the diversity of its country and the need to have critical, informed, and respectful students.

Although I already had a model in mind, as described in Chapter Two, I also knew that I needed to see not simply how well that model would work in various countries but how people already thought about and used leadership in the education system. Thus, it was necessary to conduct interviews with different people to hear their opinions about the leadership, organizational structure, and approaches to learning used in their own education system. The three countries in which I chose to conduct this research had several benefits, as explained in Chapter Three, but were also countries in which I had personal experience and a personal connection (e.g., currently living and studying in Canada, growing up and working in Iran, speaking Turkish as my first language and regularly visiting Turkey). Although this made it easier to conduct research in those countries, it is possible that my many years of exposure to the local religious and



political ideologies and patterns of education may have biased my expectations and understanding of their education systems. As such, it was very important to get opinions from people natively living in those countries and working or studying within its education system.

### **Summary**

In this chapter, the purpose of this research, the research questions, and the significance of this research were described. The ultimate goal of this research was also mentioned: to conceptualize a model for educational leadership appropriate for a global society. This model may include existing theories in leadership, organization, and teaching approaches or it may require something different. Therefore, in chapter two will be presented a description of educational leadership followed by multiple theories in leadership, organization, and teaching approaches. These theories are popular or significant in their respective areas, and could be potentially relevant for the above-mentioned model; hence, they should be examined and discussed to conceptually determine their usefulness for the global education leadership model.

## **Chapter Two: Literature review**

This chapter will contain a brief description of educational leadership as a broad starting point. Consistent with the purpose of this research, comparing styles of leadership between Middle-Eastern Islamic and Western Secular perspectives to determine a model for global educational leadership, this literature review will highlight particular needs with respect to leadership in the context of education for a global society.

To conduct this literature review, I used the Education Resources Information Center (ERIC) database and Google scholar. ERIC is an Internet-based digital library of research and information in Education, sponsored by the Institute of Education Sciences of the United States Department of Education. It provides access to a variety of academic literature going back to 1966, with a full-text database that can be searched online. When conducting this literature review, I would frequently look up papers based on the references and authorship of other papers that I thought were relevant, and then would search using keywords similar to the accepted ones. For example, once I learned about transformational leadership then I would look for other papers on the same topic. Usually, the full text of these papers was available on ERIC.

For analyzing the literature, Onwuegbuzie and colleagues suggest two main forms: within-study literature analysis and between-study literature analysis (2010). A within-style analysis involves a rigorous and comprehensive analysis of a single work, looking at all components (e.g., title, literature review, theoretical framework, and discussion) rather than just looking at the results section. A between-study analysis involves comparing and contrasting information from two or more sources. Most commonly, the results of empirical works are compared. However, I will use the more

exhaustive form in which multiple components of multiple works are compared (e.g., comparing the results of one work with the theoretical framework of another; comparing the literature review sections of two works; etc.).

After gathering literature I categorized them into three main groups: leadership, organization, and approaches to learning. The literature on organization focuses on how organizations are structured and operated, and how both structure and operation are connected to leadership. The literature on approaches to learning focuses on particular methods of teaching that are related to leadership. In other words, if we consider a teacher as a leader in the classroom, their approach to teaching is an expression of their role as a leader. However, teaching is not merely an act of leadership, and much of the research on different approaches to teaching ignores this leadership dimension. Hence, the literature for approaches to learning only covers a few theories that complement, or are associated with, specific leadership theories.

### **Globalization and Intercultural Relations**

Globalization brings both good and bad opportunities for many countries. It brings innovation, new experiences and technologies, and new opportunities for work, but it also contributes to economic inequality, weakened job security, and social division and tensions (OECD, 2016). When describing globalization, it can generally be done in two ways. One method involves describing how economic and political interconnectivity increases, typically through business interests, even when such interconnectivity is not necessarily desired. This method is often referred to as globalization from above (Brecher, Costello, & Smith, 2000). The second method involves describing the interconnectivity that occurs as individuals work together to find cooperation and mutual

respect within an increasingly diverse society. This method is often referred to as globalization from below, since it occurs at the grassroots level (Brecher et al., 2000). Both cases acknowledge that forces at the global level influence events at the local level, but in an attempt to better theorize and discuss the interaction between the global and local level Weber (2007) describes the concept as ‘glocal.’ Glocalization, where forces at the global and local level merge and interact, is gaining interest in education because of how complicated and challenging these forces are for the development of education (Spring, 2008).

Although glocalization is of interest to researchers in education, there is limited discussion of the material in educational leadership. Brooks and Normore (2010) discuss how the educational leadership literature has not been considering the implications of glocalization, such that the leaders are either ignorant of this perspective or they are aware of the perspective but are not using any such material so as to engage their students in this perspective. This is a problem, since the skills that students need as a result of glocalization differ from an education setting that ignores or does not consider that perspective. The new skills are typically grouped under the heading of global competence (OECD, 2016).

Global competence refers to “the capacity to analyse global and intercultural issues critically and from multiple perspectives, to understand how differences affect perceptions, judgments, and ideas of self and others, and to engage in open, appropriate and effective interactions with others from different backgrounds on the basis of a shared respect for human dignity.” (OECD, 2016, pg 3) In other words, it is the capacity to engage with others in a way that seeks to understand their perspective, is respectful of

their cultural norms, and is mutual in that the others with whom you speak are likewise curious, respectful, and are engaged without being forced or required to do so. The main underlying belief of global competence is that diversity should be valued provided it does not violate human dignity (OECD, 2016). A summary of key themes of global competence across different cultures includes: respect, listening, adaptation, relationship building, seeing from multiple perspectives, self-awareness and cultural humility (Deardorff, 2013).

The need for this concept derives from the realization that the youth in a global society need to learn how collaborate with others from different countries, cultures, backgrounds, and academic and industrial disciplines, primarily because such collaborations are often necessary in order to solve complex economic and social problems. Complex problems require careful and critical analysis, and when these problems involve cross-cultural engagement there also needs to be mutual respect and a desire to understand multiple perspectives (OECD, 2016). Although global competence involves more than knowledge, the knowledge component can be thought about as ‘intercultural knowledge.’ This is not simply seeking to understand the perspectives of others, but recognizing the influences that have shaped one’s own perspective and recognizing the commonalities between different perspectives (Doscher, 2012). It is also important to acknowledge that understanding the values of a different culture does not mean to accept or agree with them, but understanding how those values affect the way that others think and behave provides a means of reflecting on one’s own values and seeing how they have shaped how one thinks and behaves (Fennes & Hapgood, 1997).

Since leaders are often responsible for setting the vision and direction of an organization, they also need global competence in order to communicate effectively with people from diverse cultures and determine how best to work within different cultural contexts (Pusch, 2009). For leaders, the global competence required is the ability to consciously shift the cultural perspective and behavior used depending on the local circumstances, as well as using these different cultural perspectives to evaluate the current circumstances and goals (Pusch, 2009). Teachers also need to develop global competence in order to properly understand how it can be taught. Thus, global competence needs to be not simply within the curriculum but also part of the leadership style that it used. There is no leadership style specifically for global competence, but some researchers have explored what it looks like for leaders to develop global competence (e.g., Osland, Mendenhall, & Li, 2017) while other leadership theories, such as transformational leadership and leadership in learning organizations that are discussed below, consider global competence as part of the necessary skill set that leaders should have and empower in others.

### **Leadership Theories**

The recent literature on leadership can be grouped by whether it comes from a Western or Islamic perspective. “Western leadership” here includes the various leadership theories that have been developed predominantly in the United States, Western Europe, and countries from a similar cultural background (e.g., Australia). “Islamic leadership” includes various leadership theories that have been developed in countries with an Islamic ideological approach (e.g., Iran, Turkey, Malaysia, and Saudi Arabia). Even though such theories are typically from Middle-Eastern countries, it is the religious

element that matters the most; in other words, the Islamic foundation is critical for these theories, whereas leadership theories from the Western literature, such as Situational Leadership (Hersey & Blanchard, 1982), Transformational Leadership (Roueche, Baker III, & Rose, 2014), and Scientific Management (Robbins, Bergman, Stagg, & Coulter, 2002) excludes, ignores, or limits a religious dimension. Leadership theories could be developed using a religious dimension other than Islam. However, the goal of this dissertation is to consider leadership theories in light of a global society, which means it is necessary to consider the approach taken in various countries and cultures. This dissertation did not look at every country, but considered theories from Western countries (e.g., Canada and the United States) and Islamic countries (e.g., Iran and Turkey) because of their global political and financial strength, the differences in their ideological approach to leadership, and the recent impact of terrorism (i.e., terrorism seems to be more active in or from Middle-Eastern countries, regardless of any underlying reasons there may be for such terrorism).

Furthermore, the conception of leadership from a Western perspective has undergone changes over the past 150 years such that various theories can be associated with a particular time-period of Western thought. Roughly speaking, these time periods can be organized as pre-modern, modern, and postmodern, with postmodern often considered the current time period of Western thought. Although it could be argued whether Islamic leadership theories have undergone similar changes, academics who discuss and analyze such theories (e.g., Khan, 2008) do not conceptualize them as fitting into particular Western time periods but rather emphasize the Islamic foundation. In other words, while Western academics may discuss whether a theory is ‘modern’ or

'postmodern', Islamic academics discuss what ideological or theological school of thought that a theory fits into regardless of the time period. To avoid forcing one method of conceptual categorization, the leadership literature is simply divided into four groups: pre-modern, modern, postmodern, and Islamic.

### **Nature of Leadership**

Leadership is a part of human life, and has been since the beginning of human civilization. Yukl (2006) defined leadership as “the process of influencing others to understand and agree about what needs to be done and how to do it, and the process of facilitating individual and collective efforts to accomplish shared objectives” (p. 8). Northouse (2012) defined leadership as “a process whereby an individual influences a group of individuals to achieve a common goal” (p. 3). These definitions suggest several components central to leadership. Some of them are as follows: (a) Leadership is a process, (b) leadership involves influencing and engaging in dialogue with others, (c) leadership happens within the context of a group, (d) leadership involves goal attainment, and (e) these goals are shared between leaders and other group members. Each of these components will be examined below, followed by a brief discussion on the related topics of how trait leadership is different from leadership as a process, how emergent and appointed leadership are different, and how coercion, power, and management are different from leadership.

***Process leadership.*** Some have suggested that leadership is an inherent quality with which a person is born, similar to other qualities like charisma or patience (Northouse, 2012). However, conceptualizing leadership as a process moves away from thinking about leadership as a single characteristic or trait received at birth towards the



relationships that are formed between leaders and other group members. In other words, leadership is thought about in terms of how leaders affect, and are affected by, their followers either positively or negatively. It stresses that leadership is a two-way, interactive event between leaders and followers rather than a linear, one-way event in which the leader affects the followers but not vice-versa. Defining leadership as a process makes it available to everyone—not just a select few who are born with it. “More important, it means that leadership is not restricted to just the one person in a group who has formal position power (i.e., the formally appointed leader)” (Rowe, & Guerrero, 2012, p. 2). However, it should be noted that simply because leadership is two-way does not mean the effects are equal in strength or quality; the leader could have a much stronger effect. For example, in the context of a school community, parents can be affected by decisions and actions by various leaders in the community without having any opportunity to contribute a comparable degree of effect. How this two-way process operates in practice can vary greatly depending on the dialogue that occurs.

***Leadership is about influence.*** Influence can be in any level of work or organizational context, such as subordinates, peers, and bosses. Without influence, it might be impossible to be a leader (Dubrin, 2007). At the same time, having influence increases the need to be ethical with how that influence is used. For instance, a leader who has significant influence over a group could cause happiness or suffering of the group, depending on what decisions he or she makes. If more dialogue occurs (i.e, the leader receives greater input from others in the group) then the leader has less influence, but can make decisions that are more consistent with the desires of the rest of the group.

***Leadership operates in groups.*** This means that leadership is about influencing a group of people who are engaged in a common purpose or goal (Hollander, 1992). This can be a small center for management improvement in a business school with a staff of four, a naval ship with a company of 300, or a multinational enterprise such as Starbucks with almost 10,500 stores worldwide and in excess of 100,000 employees. This definition of leadership confines the inclusion of leadership training programs to those that teach and help people to lead themselves.

***Leadership includes the achievement of goals.*** Leadership is working with different groups of people and directing them toward the accomplishment of a task or the reaching of an endpoint through diverse means (Dubrin, 2007). Leaders and their employees work together and incorporate their energies to achieve something together. For example, a sports coach works with his or her players to get high points in a game or win a championship. As another example, a teacher can be a classroom leader who would like to help his or her students develop a better understanding of some topic.

***Leaders and followers share objectives.*** Leadership means that leaders work with their followers to achieve private or organizational objectives (Hollander, 1992). Establishing shared objectives, leaders and followers can coalesce around difficulties to find a logical solution. If followers and leaders work together, those leaders who offer better opportunities and support for determining goals will be able to find goals that are more appropriately defined for their organizations (Dubrin, 2007).

***Trait versus process leadership.*** Statements such as “She is a born leader” or “He was born to lead” suggest leadership is trait-based. Yukl (2006) explained that the trait approach “emphasizes leaders’ attributes such as personality, motives, values, and

skills. Underlying this approach was the assumption that some people are natural leaders, endowed with certain traits not possessed by other people” (p. 13). In other words, trait-based leadership means leadership is innate and restricted to only certain people. Since leadership is restricted to these special people, due to their birth, adherents of this approach would believe that it is impossible to train people who are not born with those traits to become leaders (Yukl, 2006). Bryman (1992) described some example traits that are helpful for leadership, including: an extroverted personality, good speaking ability, and various physical characteristics such as height. In contrast, considering leadership as a process means that leadership is not dependent on personal traits; it suggests that anyone can be a leader, leadership is observable, and leadership can be learned through seeing how leaders behave or what they do (Daft, 2005; Jago, 1982; Northouse, 2012).

*Assigned versus emergent leadership.* Assigned leadership occurs when a person is appointed to a formal position of authority within an organization (Yukl, 2006). In contrast, emergent leadership occurs when one member of a group is treated as a leader by his or her peers. For example, a general manager of a sports team or CEO of a business are appointed leaders. However, people within those groups may look to another person for leadership; this other person is an emergent leader. Emergent leadership appears when others perceive a person in their group to be the most influential, regardless of his or her formal position within the group (Yukl, 2006). This form of leadership grows entirely by how the emergent leader behaves and others in the group support, accept, and/or encourage leadership behaviour. Therefore, emergent leadership does not appear as a result of being appointed to a position but gradually over time from positive communication and interactions (Yukl, 2006). For instance, some examples of

communication and interactions that result in emergent leadership are keeping others well informed, asking others for opinions, being firm in one's decisions but still remaining flexible, and suggesting new or compelling ideas (Fisher, 1974; Northouse, 2012). In other words, emergent leadership appears due to the leader's "ability to inspire confidence and support among the people who are needed to achieve organizational goals" (Dubrin, 2007, p. 2).

***Leadership and power.*** McFarland (1969) has suggested that power and leadership are related, because power is part of the ability to influence others, but having power is not the same thing as leadership. One way of defining power is the capacity to influence others so they create the desired effect. In other words, a person with influence has the power to affect the beliefs, attitudes, opinions, and behaviours of others.

Daft (2005) explained that power within an organization can be roughly divided into two types: positional and personal power. Positional power is the power a person gets due to their position within the organization. For example, the president of a university, the dean of a faculty, and a professor within a faculty may have different amounts of power but they all have positional power. In contrast, personal power is the power arising from having positive relationships (i.e., supportive, encouraging, helpful) with others (Yukl, 2006). When someone is viewed by his or her peers as being knowledgeable, likable, and supportive then that person has personal power.

Furthermore, if a person has both positional and personal power, Daft (2005) suggested it is best to use personal power; positional power is much easier to overuse, whereby people think someone with positional power is "abusing" or "misusing" it. Once positional power is seen as abusive, it ceases to have influence; more often it results in no

influence, or influence that encourages others to act in a contrary manner. Therefore, it is important to know when to use positional power and to what extent, so that the influence one desires to exert does not become harmful. For example, if the goal is to encourage students to spend more time reading about some topic, the positional power of a teacher could be overused such that the students no longer want to read; in other words, the power no longer has influence and the goal is now more difficult or impossible to achieve.

Furthermore, using power can often result in an unequal exchange (Daft, 2005); power can be used to achieve goals that enhance the state of the person with power, at the expense of others, and it can enhance the state of the group at the expense of the person with power. This is not guaranteed to occur, but it can happen.

***Leadership and coercion.*** Daft (2005) also stated that coercion is a different kind of power. This is using force to cause change to occur, such as through penalties, rewards, threats, punishments, and negative reward schedules. While leaders can use coercion, coercion is not the same thing as leadership. In addition, coercion is often counter-productive when trying to achieve shared goals, and being coercive can have unintended negative effects such as provoking obstructive or even hostile behaviour (Dubrin, 2007; Yukl, 2006).

***Leadership and management.*** Leadership and management are similar, since they both involve influencing and working with people and achieving shared goals. Zaleznik (1977) suggested that managers and leaders are very different, and that a person cannot be both a leader and manager. According to Zaleznik (1977), managers are reactive, work with others to solve problems, and have minimal emotional or personal

involvement with others; leaders are instead proactive, work to shape the ideas of others, and have emotional involvement in the overall process. In other words, managers limit choice and leaders seek alternatives to change the choices available. Therefore, managers can change people's behaviour but do not address underlying issues of attitude or purpose; leadership focuses on these issues, and can change people's attitudes but does not focus on the specific details of implementation. Other authors have also stressed this difference. Mintzberg (1998) argued that managers see an organization from the perspective of calculations, portfolio components, rationality, and numbers and keywords; on the other hand, leaders look at the organization from an integrative or holistic perspective, emphasizing commitment.

Although Zaleznik (1977) suggested managers could not be leaders, and vice-versa, Mintzberg (1998) said that managers in particular need to be both managers and leaders. Kotter (1998) suggested that a balance of leadership and management is necessary; an organization with strong leadership and weak management is probably worse than one with weak leadership and strong management. In other words, it is best to have strong leadership and strong management. According to Kotter (1998), managers are needed to handle the planning, budgeting, organizing, and staffing of an organization and to control and solve various problems that arise. Leaders are there to set direction and align, motivate, and inspire others to move in that direction. Like Mintzberg, Kotter says that organizations need people who can be both a manager and a leader (a leader-manager).

Bennis and Nanus (1985) indicated strong management with weak leadership would result in an organization that is very bureaucratic, with limited creativity and

innovation. Strong leadership and weak management will result in an organization that pushes for misdirected or meaningless change. This difference is well described by Bennis and Nanus' often quoted phrase: "Managers are people who do things right and leaders are people who do the right thing" (1985, p. 221). In other words, organizations need leaders so that the *right thing* gets done and organizations also need managers so that things *get done right*.

Rowe (2001) argued that the differences between being a leader and a manager could be a philosophical one, in that managers follow a deterministic belief system while leaders follow a free-will one. In this case, managers think that the decisions they make are determined by their organization and the industry or environment in which this organization functions. In contrast, leaders think that their decisions affect their organization and that the organization will in turn affect or shape the industry or environment.

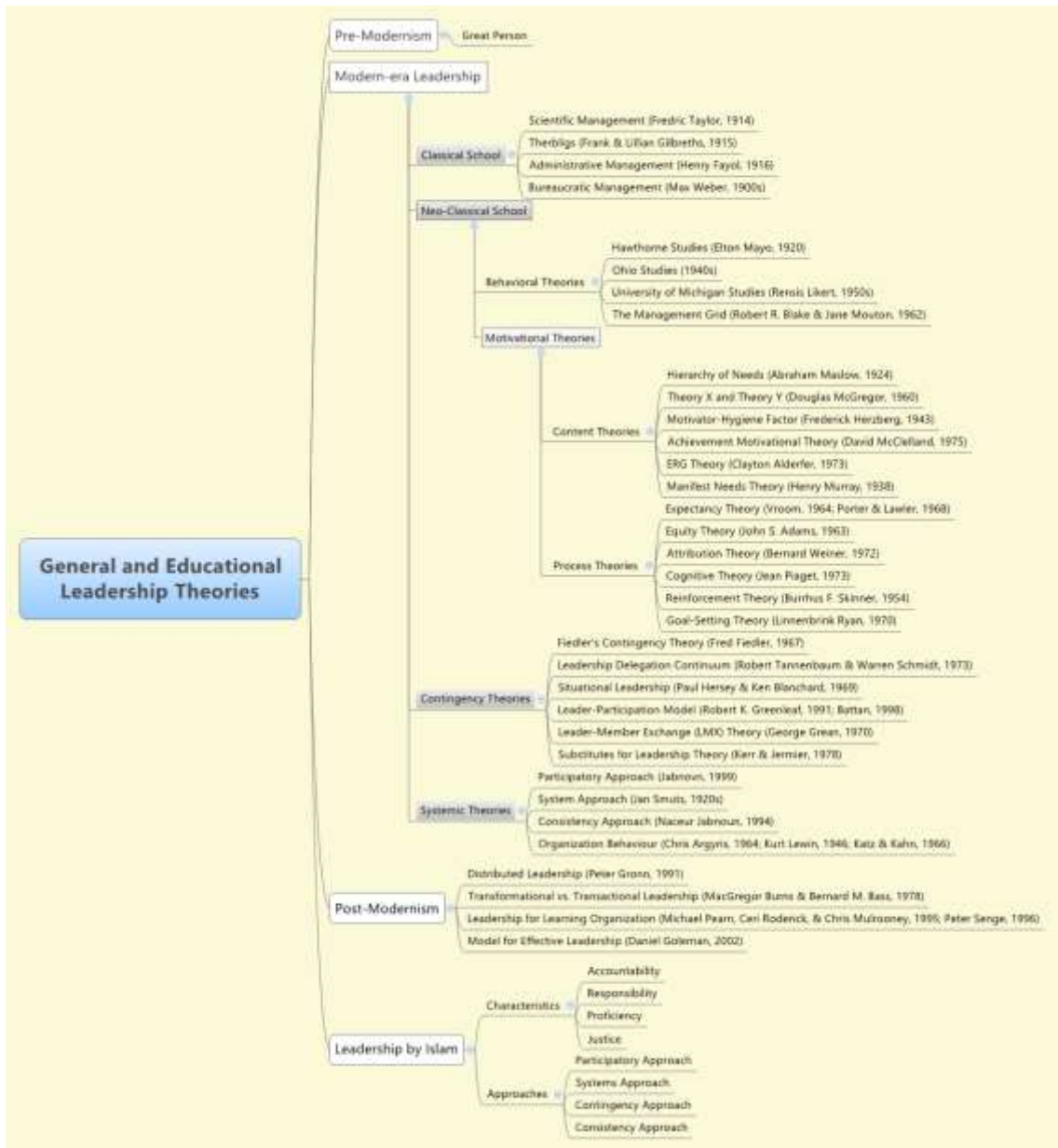


Figure 2.1. This figure shows the leadership topics that are discussed in the literature review, and how they are organized.

### Pre-Modern Leadership

Feldman (2000) described a pre-modern worldview as one in which natural and supernatural events and objects were thought of as existing side-by-side. He contrasted this with a modernist worldview, in which science and the natural world tended to be overemphasized to the point where the supernatural does not exist. In other words, people



who hold a pre-modern worldview tend to consider inherent qualities and the supernatural as important while those with a modern worldview tend to look at other qualities. Therefore, people with a pre-modern worldview think about the nature of leadership differently from those with a modern worldview.

In the pre-modern worldview, leadership was something given to specific individuals because of their character, background (e.g., social status, family wealth), and education. These leaders have elsewhere been called “great people,” or “great men and women” (Feldman, 2000). Great people not only led organizations but also influenced history and established societal values. As such, leadership was considered something inherent in individuals; someone was a leader because they were born with the necessary qualities (referred to as trait-based leadership) or born with the potential to become a leader that was made possible through elite education. Given the role that the supernatural played in a pre-modern worldview, a person’s inherent qualities could include the possibility that God had ‘chosen’ him or her to be a leader. Feldman (2000) stated that it was common for great people to exert their authority through a more paternalistic or maternalistic concern for the welfare and education of others. Although someone in a leadership position had the power to exert such an influence, the pre-modern conception of leadership was that if someone was given such a position then they had the characteristics necessary to fulfill that position.

### **Modern Leadership - Classical School**

Although leadership in a pre-modern context is generally explained by one theory (the great person), there are diverse theories exploring leadership in the modern context (both what leadership is and how it can be best developed or applied). These theories can

be organized according to the rough time period or overarching attitude of their proponents, expanding on categorization methods given by Agarwal (1982). See Figure 2.2 below for a general sense of how all the modern theories are related.

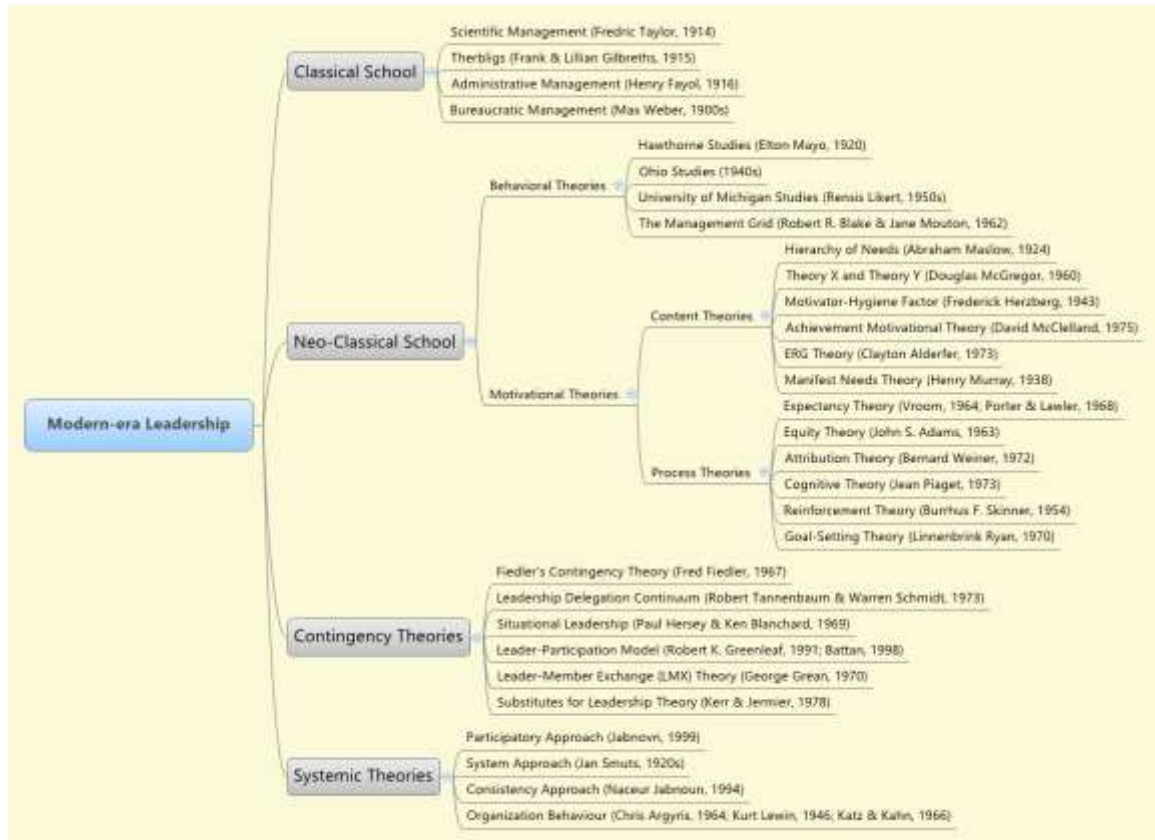


Figure 2.2. This figure shows the interconnectedness of the many leadership theories in the modernist era.

The leadership theories that can be considered part of the “classical school of leadership” are derived from the area of management focusing on profit maximization, high specialization, and centralized decision-making. Thus, leaders saw their followers (i.e., the employees) only in terms of their physical, economical, job-satisfaction, and social needs (Feldman, 2000). This led to constant revision of the theories to better balance these needs with the actual well being of employees. Therefore, in the classical school of leadership, four main theories will be discussed: Taylor’s scientific

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management, the Therblig approach, administrative management theory, and bureaucratic management theory.

***Taylor's scientific management.*** Frederick Taylor was an American mechanical engineer who sought to improve industrial efficiency. He was one of the first management consultants, and has been called one of the intellectual leaders of the Efficiency Movement. Inefficiency was a popular topic in his period (Callahan, 1964; Robbins et al., 2002). Nelson (1980) stated that Taylor's highly influential ideas were broadly summed up in his book *The Principles of Scientific Management* (Taylor, 1914). The purpose of Taylor's theory was that it should maximize prosperity for industry owners, workers, and managers (Certo & Certo, 2006). This was considered possible through teaching workers and managers the most efficient way to do their work; hence it was necessary for Taylor to develop a theory to measure efficiency. Since Taylor believed that the workers and managers are mutually interdependent, any antagonism or inefficiency that occurred in the workplace had to come from one of three sources: (1) the fallacious belief by workers that unless they worked to the maximum each day they would lose their job; (2) defective management systems that caused workers to protect their own work and interests; and (3) inefficient methods of work (Certo & Certo, 2006). His theory focused on finding the "one best way" to perform a task. In other words, this theory investigated productivity to find a process of how a task situation can be structured to achieve the highest production from workers.

Scientific management was applied to all levels of management. However, its studies, illustrations, and research applications mostly focused on lower-level managers (Robbins et al., 2002). In his research, Taylor focused on three important options:

productivity, production efficiency, and changing the attitudes within and between labourers and managers. Four principles of management were introduced by Taylor (as summarized by Robbins et al., 2002): (1) Use the scientific method for elements of an individual's work instead of the old 'rule of thumb' method; (2) Workers must scientifically select and then train, teach, and develop their skills and capacities; (3) Workers must learn to work together and heartily cooperate with the others in order to ensure that all work is done; and (4) Divide the work and responsibility between management and workers.

***Therbligs approach.*** Building onto Taylor's Scientific Management Theory, Frank and Lillian Gilbreth suggested their Therbligs<sup>2</sup> Approach (Wood & Wood, 2003). In this approach, 18 kinds of elemental motions are used to study the motion economy that workers must use in their workplace. A workplace task is analyzed by recording each of the therblig units for a process. The results can optimize manual labour by eliminating unneeded movements (Wood & Wood, 2003).

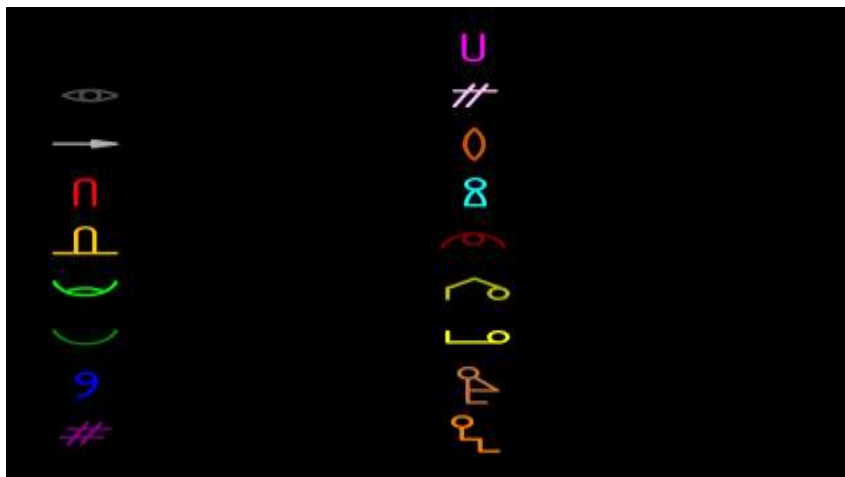


Figure 2.3. A list of the 18 Therbligs (Wood & Wood, 2003).

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<sup>2</sup> The name Therblig is derived from Frank and Lillian's last name, Gilbreth.

***Administrative management theory.*** When Scientific Management Theory is applied to the entire range of managerial performance (i.e., when the organizational efficiency of management is analyzed), this becomes known as Administrative Management Theory. Among the well-known participants in this are Fayol, Barnard, Brown, Dennison, Gulick and Urwick, Mooney and Reilly, and Sheldon (Heames & Breland, 2010). Henri Fayol (1841 - 1925) was the most notable contributor with his work *General and Industrial Management* (e.g., Fayol, 1949); this work presents a management philosophy that is still accepted by many present-day managers (Griffin, 2013). Henri Fayol is usually considered the precursor in administrative theory because of the elements and general principles that his writings cover (Certo & Certo, 2006). His elements of management include planning, organizing, commanding, coordinating, and controlling and are still considered worthwhile divisions for studying, affecting, and analyzing the management process (Certo & Certo, 2006). The principles developed by Henri Fayol include: division of work, unity of command, authority, discipline, subordination of individual interest to general interests, unity of direction, remuneration, scalar chain, centralization, order, initiative, equity, stability of tenure of personnel, and esprit de corps.

***Bureaucratic management theory.*** Bureaucratic management is a stream of classical management theory that is “a formal system of organization that is based on clearly defined hierarchical levels and roles in order to maintain efficiency, effectiveness, and accountability” (Forrer, Kee, Boyer, 2014). Max Weber (1864 - 1924) developed this theory, and it is applicable for management in both public and private sectors. According to the bureaucratic management approach, hierarchies are similar between organizations

in different sectors and industries; their purpose is to create strong lines of authority and monitoring (Schermerhorn, Hunt, & Osborn, 1991). Additionally, Max Weber was the first management theorist to develop a theory in terms of authority structures and their relationships within organizations. According to Wren (1994), Weber's theory argued for a form of organization determined by division of labour, detailed rules and regulations, clearly defined hierarchy, and impersonal relationships.

### **Modern Leadership - Behavioural Theories**

The classical school of leadership was followed by the neoclassical approach, beginning with the Hawthorne studies in the 1920s, which grew out of the limitations of the classical theories (Gupta, 1992). Under the classical approach, attention was focused on jobs and machines. Eventually, workers resisted this approach since it did not provide social and psychological satisfaction. Therefore, attention shifted towards the human side of management. George Elton Mayo (1890 - 1949) is considered to be the founder to the neoclassical theory (Gupta, 1992). He was the leader of the team, which conducted the famous Hawthorne Experiments at the Western Electric Company (USA) from 1927 to 1932.

The neoclassical school of leadership can be broadly divided into two main groups: behavioural theories and motivational theories. Behavioural theories are classified in studies that focus on specific behaviours of a leader. In other words, a leader's behaviour will be the best predictor of his/her leadership style and its influence as a result; additionally, it is the best determinant of his/her success as a leader. Factors important for a leader's behaviour were explored in several groups of experiments, three of the more important ones include: the Hawthorne Studies, Ohio Studies, and University

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of Michigan Studies. In addition to influencing various leadership theories, the results of these studies were merged with previous leadership theories to create the Managerial Grid theory.

***Hawthorne Studies.*** The Hawthorne Studies were a series of experiments conducted at the Western Electric Company (USA) between 1927 and 1932 that provided new insights into individual and group behaviour (Griffin, 2013). The research, originally sponsored by General Electric, was conducted by Elton Mayo and his associates. The studies focused on behaviour in the workplace. In one experiment involving this group of workers, for example, researchers monitored how productivity changed as a result of changes in working conditions. The Hawthorne Studies and subsequent experiments led scientists to the conclusion that the human element was very important in the workplace.

***Ohio Studies.*** In the 1940s, a research group from the Ohio State University (OSU) developed the Leaders' Behaviour Description Questionnaire (LBDQ) to measure nine different behavioural leadership dimensions (Gill, 1998). This list included 150 statements, narrowed down from a collection of over 1800 statements. As part of the OSU Studies, the LBDQ was developed and administered to various people (college students, college administrators, company managers and leaders, military personnel, etc.) to identify common leadership behaviours. The results of the study suggested that there were two main groups of behaviours: the consideration behaviour (people-oriented leaders) and initiating structure behaviour (task-oriented leaders) (Gill, 2011). The people-oriented leaders focused on developing interpersonal relationships, mutual trust, and positive affiliations and they had concern for the welfare of the members of the

organization. The task-oriented leaders focused on the operating procedures and structure of the organization.

*University of Michigan Studies.* In addition to the OSU Studies, there was another well-known set of leadership studies conducted at the University of Michigan (U of M) in the 1950s. These studies, organized by the famous organizational psychologist Dr. Rensis Likert, found the same two behavioural types identified by the OSU Studies and explored their effectiveness within organizations (Ercetin, 2012). The two behaviours were renamed relationship-oriented and task-oriented. The studies concluded that behaviours oriented towards employees rather than production, and general instead of close supervision, led to a more effective organization. In other words, the relationship-oriented (people-oriented) leaders were the most useful, and task-oriented behaviours were not particularly effective for a well-functioning organization.

*The Managerial Grid.* The managerial grid model was developed by Blake and Mouton (1964), and built on some previous research (the Ohio studies and Theory X and Y, which is described later in this review). Since the original formulation, it has undergone continual change (see McKee & Carlson, 1999, for latest version). Originally, the model identified five different styles of leadership through comparing the degree of concern for people (the y-axis of the grid) with concern for production (the x-axis of the grid). These five leadership styles corresponded to different points on the grid, and thus high or low levels of either of these concerns. The five styles are: indifferent, accommodating, dictatorial, status quo, and sound (Cunningham & Cordeiro, 2003). Two additional styles were part of the grid but do not necessarily fit on it: opportunistic and paternalistic (Cunningham & Cordeiro, 2003). Each style is briefly described below.



*Indifferent.* This style (previously called impoverished) has low concern in both dimensions. It is mainly used by leaders to protect them from getting into trouble (i.e., for job security and to maintain seniority). Since their concern is to avoid responsibility for mistakes, they make less innovative decisions and avoid anything serious (Cunningham & Cordeiro, 2003).

*Accommodating.* This style (previously called country club) has high concern for people but low concern for production. It is mainly used to maximize the comfort and security of the employees in the hope that this will improve performance. While it will create a friendly and welcoming environment, it is usually also an unproductive environment.

*Dictatorial.* This style (previously called produce or perish) has high concern for production but low concern for people. It is mainly used to maximize performance, by pressuring employees through rules and punishment and motivating them with money. As such, people with this style tend to ignore employee needs. This style is based on Theory X, and is often used in cases of crisis management or when an organization is bordering on perceived or actual failure.

*Status Quo.* This style (previously called middle-of-the-road) has moderate concern for both people and production. This style attempts to balance the goals of an organization with the needs of its members. Unfortunately, this balance tends to switch between considering and ignoring both people and production, whereby ultimately neither production nor people needs are met with much effectiveness.

*Sound.* This style (previously called team style) gives high concern for both people and production. In order for this style to work, the members of the organization

have to feel as though they are constructive parts of the overall organization. This style is based on Theory Y, such that teamwork and commitment among members are emphasized.

*Opportunistic.* People who use this style of leadership constantly fluctuate in their position on the grid. They use whatever style gives them the best personal benefit, and this can change depending on the circumstances of the organization.

*Paternalistic.* People who use this style constantly switch between the Accommodating and Dictatorial styles. The style used can depend on the circumstances or just their current mood. People who use this style tend to praise and support others, but also discourage any opposition to their own plans or conceptualizations of the current circumstance.

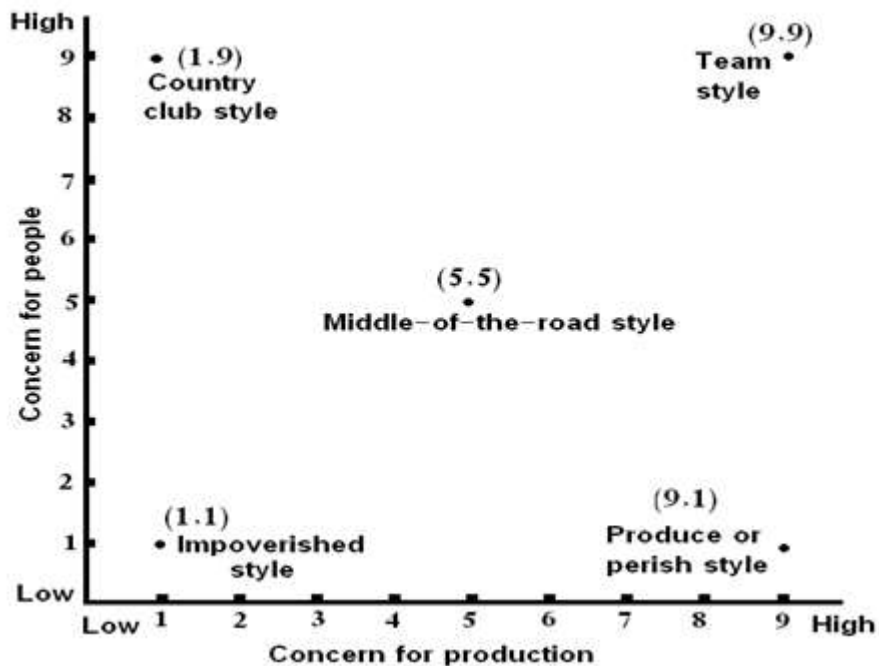


Figure 2.4. The Managerial Grid (see Blake & Mouton, 1981).

**Modern Leadership - Content Motivation Theories**

The other neoclassical set of leadership theories focused on the motivation of people rather than their behaviour. Robbins and Langton (2007) stated that motivation is the force that initiates, guides and maintains goal-oriented behaviours; it causes us to take action, whether that action is to grab a snack to reduce hunger or enrol in college or university to earn a degree. The forces that lie beneath motivation can be biological, social, emotional, or cognitive in nature. For this literature review, motivation will be defined as the process that accounts for an individual's intensity, direction, and persistence of effort toward attaining a goal.

Researchers have developed a number of different theories to explain motivation (e.g., Maslow, 1943; Murray, 1938; McGregor, 1960; Schneider & Alderfer, 1973; Piaget, 1973; McClelland, 1975). Each theory attempts to explain what motivated people to behave in a certain way in the given circumstances. Although these theories can be used as a framework for how to motivate people in the best possible manner, they are all limited in scope and inconclusive (Jayram & Kotwani, 2012). There is much competition and criticism between adherents of these theories and it can be difficult to argue which theory is correct. However, by looking at the key ideas behind each theory, one can gain a better understanding of the whole phenomenon of motivation.

The motivational theories can be roughly divided into two categories, based on the target of the cognitive processing. The first category includes Content Theories, which focus on motivation in terms of what people want. The second category includes Process Theories, which focus on the mental or cognitive processes by which people decide how to act. Some content theories are explored below (in particular: the hierarchy

of needs, Theory X and Theory Y, motivation-hygiene theory, achievement motivation theory, existence-relatedness-growth theory, and manifest needs theory), while the process theories are explored in the next section.

***Hierarchy of needs.*** The Hierarchy of Needs model was developed by Maslow, who attempted to determine motivation based on people's unconscious desires and needs (Goble, 2004). It is a hierarchy in the sense that people attempt to fulfill the needs at one level, and then move onto the next. In the earliest, and most commonly used, version of the model there were five levels (Maslow, 1943; 1954). These start with basic needs (physiological, safety, love, and esteem) and end at growth needs (self-actualization). In this theory, the basic needs must be met first, and these basic needs will be the source of motivation before any of the other levels; the longer these needs are not met, the stronger the motivation will become. For instance, a person who has not met the need for food will seek it out, and he or she will be more motivated by food the longer that need has remained unresolved. While the expectation is that these needs will be met in order, starting with the lowest, Maslow actually pushed for motivating people with the highest level (self-actualization) so that people would not get stuck within one level of need (Goble, 2004); Maslow also indicated that using self-actualization for motivation was often difficult, since people and societies tended to use the lower levels for motivation first and that these lowest levels are often the needs that remain unmet the longest (Goble, 2004).

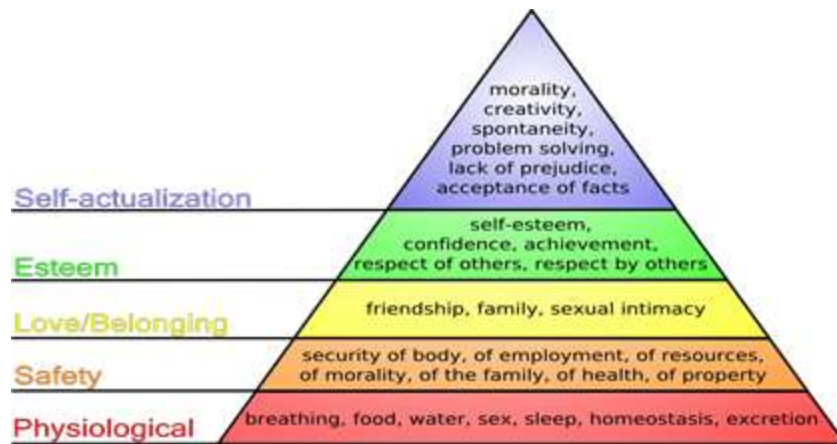


Figure 2.5. Maslow's original Hierarchy of Needs (Maslow, 1943).

**Theory X or Theory Y.** McGregor applied Maslow's Hierarchy of Needs to the field of management and built a new theory following from it called Theory X and Theory Y (McGregor, 1960). In turn, managers began using this theory with the thought that they had two options for motivating employees (either X or Y) even though McGregory suggested that Theory Y yields better results (Rothwell, Stavros, Sullivan, & Sullivan, 2009). In Theory X, it is assumed that people inherently dislike work, are unable to achieve goals without reward or punishment, have no work-related ambitions or desires, have no interest in increasing responsibility, and merely want security; hence, management's role is to coerce and control employees (Rothwell et al., 2009). In Theory Y, the opposite is the case. It is assumed that people are willing to work and put in effort, that this effort increases based on its relationship to the overall goal, and that they have various skills that can be used to solve problems (e.g., creativity, imagination, etc.). In this case, the role of management is to develop the potential of employees and direct it towards accomplishing the goals of the organization (Rothwell et al., 2009).

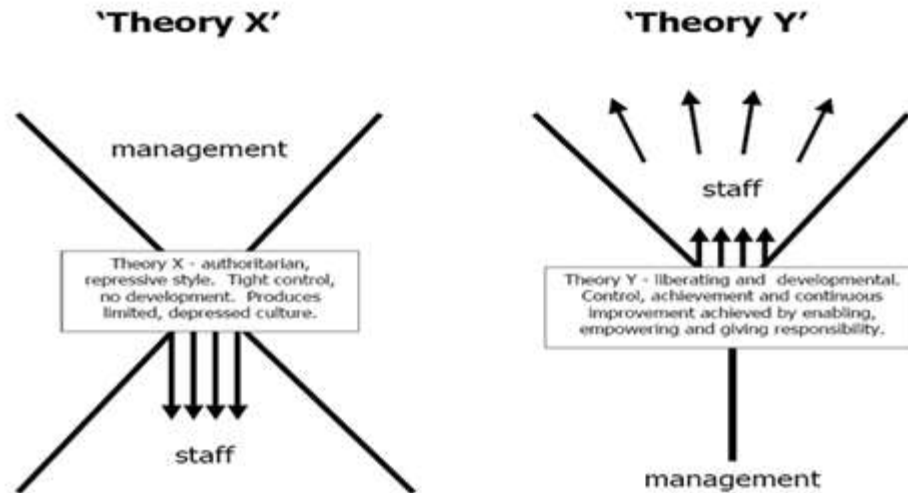


Figure 2.6. The role of management and staff in Theories X and Y (Borkowski, 2015).

**Motivation-Hygiene Factor.** In this theory, various factors were identified that result in job satisfaction (i.e., motivation factors) or dissatisfaction (i.e., hygiene factors) (Herzberg, 1964). In other words, causes of satisfaction and dissatisfaction are separate things that can be unrelated. Improving factors that increase satisfaction may not remove factors that result in dissatisfaction; something different may have to be done to remove them. For example, consider the motivation factor of a promotion and a hygiene factor of a hostile environment; giving an employee a promotion will increase job satisfaction, but it will not eliminate the hostile environment and thus that source of dissatisfaction will remain. Likewise, removing the hostile environment will remove that source of dissatisfaction (i.e., it will make the work environment “cleaner” and more comfortable) but it will not necessary motivate the person to work harder. Therefore, it is necessary to improve both motivation and hygiene factors in an organization (Miner, 2007). Some of the main factors identified by the theory can be seen in Table 2.1 below.

Table 2.1.

*Main factors in the Motivation & Hygiene Theory (Borkowski, 2015)*

Motivation Factors	Hygiene Factors
Achievement	Company Policy
Recognition	Supervision
Work Itself	Relationship with Boss
Responsibility	Work Conditions
Promotion	Salary
Growth	Relationship with Peers

***Achievement Motivation Theory.*** McClelland investigated how various needs are acquired as a result of interacting with others and the environment, and classified these into three broad categories: achievement, power, and affiliation (McClelland, 1975). Achievement is the desire to find solutions to problems and overcome challenges, and the feedback received based on the level of success. Power is the desire to control or influence others and the need to be in control. Affiliation is the desire to belong to a group, be connected to others, and improve one's relationships with others. An individual's motivation is a combination of these three factors, both in terms of how much these factors exist within an individual and how strongly these factors are pushed on the individual from the environment (Miner, 2007).

***Existence-Relatedness-Growth Theory.*** Schneider and Alderfer expanded on Maslow's Hierarchy of Needs, by identifying relationships between similar needs to create a set of three core needs: existence, relatedness, and growth (Schneider & Alderfer, 1973). These core needs created Existence, Relatedness, and Growth (ERG) Theory. These three core needs are still hierarchical. Existence is the first level, and refers to the basic material needs in order to physically survive. The second level, relatedness, refers to the desire for creating and maintaining interpersonal relationships. The third level,

growth, refers to the desire for personal development. This theory creates a much stronger division between the social and physiological needs, a division that did not exist in the original hierarchy (Koontz & Weihrich, 2010). Furthermore, the theory suggests that multiple levels can simultaneously motivate people and that people will focus on the needs at a lower level if the needs of a higher level cannot be met.

***Manifest Needs Theory.*** The Manifest Needs Theory is a personality theory developed by Murray to explain how people behaved. Three aspects of personality were identified: motives, presses, and needs (Murray, 1938). Motives are those aspects that motivate a person. Presses are those aspects that drive people to act or react. Needs are those aspects regarding responsiveness to various stimuli. Needs were further divided into two types: primary, which were purely biological (e.g., oxygen, food, water), and secondary, which were psychological (e.g., achievement, independence). Some of these factors were more temporary or permanent determinations of behaviour, and some were more conscious or unconscious depending on the circumstances (Ahmad-Khan, 2003).

### **Modern Leadership - Process Motivation Theories**

A process theory defines motivation as a rational cognitive process occurring within the individual. In other words, these theories look at how a person becomes motivated to reach or move toward some goal, or the process through which an individual becomes motivated (Borkowski, 2015). Similarly, in the context of leadership, process theories also conceive of leadership as a process rather than a trait. Six major process theories will be discussed: expectancy theory, equity theory, attribution theory, cognitive theory, reinforcement theory, and goal-setting theory.



**Expectancy theory.** Expectancy Theory attempts to model the behaviour of people by determining how they make decisions (Porter & Lawler, 1968; Vroom, 1964). These decisions were divided into three components--expectancy, instrumentality, and valance--which together help to determine what action a person will likely perform (Latham, 2012). Expectancy is the perception that effort will lead to performance, instrumentality is the perception that performance will lead to a desired result, and valance is the value ascribed to the result (or reward gained). All three of these factors are subjective, the first two most definitely so.



Figure 2.7. The components of Expectancy Theory and how they interrelate (Schmidt, 2002).

**Equity theory.** Equity theory explores how to balance between the input someone gives (e.g., work and skill) and the output that results (e.g., salary, recognition, reward) (Adams, 1963). The goal of using this theory is to find a fair balance, relative to the balance that can be achieved by others (Redmond, 2010). In other words, by using this theory motivation occurs when the perceived unfairness and imbalance between individuals in the group are balanced (Gogia, 2010).

**Attribution theory.** Attribution theory explores how people think based on how they interpret events (Weiner, 1972). After a person reflects on an event that has occurred

he or she can attribute it to one or more causes, categorized into two kinds of attributions: internal and external (Heider, 1958). In other words, the person attributes the cause of an event to be internal (e.g., caused by the person) or external (e.g., caused by someone else or the environment). However, a person's emotions and expectations of the event can heavily bias the attribution. Therefore, one consequence of this theory is that motivation can change significantly depending on how one perceives themselves and others (Wiggins, Wiggins, & Vander Zandan, 1994).

***Cognitive theory.*** Cognitive theory explores how people think based on the assumption that they think logically. This theory was developed from much of Piaget's work on the cognitive development of children (Piaget, 1973). Piaget's theory suggests that cognitive development occurs through progressive reorganization of existing mental structures as a result of interacting with objects within the environment, and that development during childhood affects the cognitive processes that an adult has. Therefore, decision making in adults is largely determined by the social interaction that they experienced as children (Louw, 1998).

***Reinforcement theory.*** Reinforcement theory is one of the oldest theories of motivation, which explores how people think based on how they are influenced by external stimuli (Skinner, 1954). It is also known as behaviourism or operant conditioning (Funder, 2010). In this theory, behaviour is changed through repeatedly and continually applying some external stimuli. Four kinds of stimuli can be used to do this: positive and negative reinforcement, and positive and negative punishment. Reinforcement stimuli are used to encourage behaviour while punishment stimuli are used to discourage behaviour. Thus, positive reinforcement means giving enjoyable

stimuli to encourage behaviour; negative reinforcement means removing something, to encourage behaviour; positive punishment means giving something hated to discourage behaviour; negative punishment means removing something to discourage behaviour.

This theory has been applied to many areas of study and business (Redmond, 2013).

***Goal-Setting theory.*** Goal-Setting theory explores how people think based on the idea that conscious goals influences how people act (Ryan, 1970). Thus, a person has a goal (i.e., the object or aim) and he or she will act in a way that is most conducive to accomplishing the goal. According to this theory then, the actions of an individual can be predicted or understood by exploring the relationship between conscious goals and individual performance. Studies of goal-setting theory consistently show that difficult goals result in better performance (e.g., Burns, Bradley, & Weiner, 2011; Haslam, Van Knippenberg, Platow, & Ellemers, 2014; Shaw, Gorely, & Corban, 2005); in other words, people who set goals that are difficult to achieve perform noticeably better than people who set easier goals. The goals cannot be too difficult though, since that can also be harmful to performance (see Joseph, 2010).

### **Modern Leadership - Contingency Theories**

The next set of motivation theories within the modern era is Contingency Theories. A contingency theory refers to leadership theories that founded on the idea that planning is necessary and/or helpful, and having alternate plans and/or flexibility of the implementation of a plan are critical (Jabnoun, 1994). Six major contingencies theories will be discussed: Fiedler's Contingency Model, Tannenbaum and Schmidt's model, Hersey and Blanchard's Situational Theory, the Leader-Participation model, Leader-Member Exchange Theory, and Substitutes Theory.

***Fiedler's Contingency Model.*** Fiedler (1967) developed this model for matching leadership style to situations by exploring the personality and characteristics of different leaders (Avery, 2004). In this model, the effectiveness of a leader is based on the situation and is the result of two factors: leadership style and situational control (Schyns & Meindl, 2005; Avery, 2004). The model helps to identify the leadership style that someone uses, and this can be measured using the Least-Preferred Coworker scale (Fiedler, 1967) (e.g., measuring how friendly, pleasant, warm, supportive, sincere a person may be). The leader ranks a person who was the least enjoyable to work with, using this scale, and the results of this ranking indicates if the leader is more relationship-oriented (high score) or task-oriented (low score). Relationship-oriented leaders focus more on personal connections, and are good at managing conflict and making complex decisions (Schyns & Meindl, 2005; Avery, 2004). Task-oriented leaders focus more on completing tasks, and are good at organizing groups and projects (Avery, 2004). In this model, Fiedler has conceptualized being relationship-oriented and task-oriented as opposing orientations; in other words, it is not possible for someone to be both relationship and task-oriented. This may not be an accurate reflection of reality, but it is how Fiedler's theory measures a leader's effectiveness in different circumstances.

Table 2.2.

*An example tool to measure the effectiveness of a leader based on Fiedler's Contingency Model (adapted from Booyens, 1998)*

Bottom of Scale		Top of Scale
Unfriendly	1 2 3 4 5 6 7 8	Friendly
Unpleasant	1 2 3 4 5 6 7 8	pleasant
Rejecting	1 2 3 4 5 6 7 8	Accepting
Tense	1 2 3 4 5 6 7 8	Relaxed
Cold	1 2 3 4 5 6 7 8	Warm
Boring	1 2 3 4 5 6 7 8	Interesting
Backbiting	1 2 3 4 5 6 7 8	Loyal
Uncooperative	1 2 3 4 5 6 7 8	Cooperative
Hostile	1 2 3 4 5 6 7 8	Supportive
Guarded	1 2 3 4 5 6 7 8	Open
Insincere	1 2 3 4 5 6 7 8	Sincere
Unkind	1 2 3 4 5 6 7 8	Kind
Inconsiderate	1 2 3 4 5 6 7 8	Considerate
Untrustworthy	1 2 3 4 5 6 7 8	Trustworthy
Gloomy	1 2 3 4 5 6 7 8	Cheerful
Quarrelsome	1 2 3 4 5 6 7 8	Harmonious

***Tannenbaum and Schmidt's Delegation Continuum.*** This model was developed by Tannenbaum and Schmidt to show, somewhat simplistically, the relationship between freedom given by the manager to the team (i.e., delegation) and authority used by the manager (Tannenbaum & Schmidt, 1973). The freedom and authority are inversely related, such that the manager chooses the degree of freedom/authority used. When more freedom is given, the manager is delegating authority rather than exercising it. Regardless

of how much freedom is given, the manager is still responsible for failure; this is because the manager made the decision to delegate. The level of freedom given should be dependent on the capacities of the team; otherwise, the productivity of the group will suffer (Thomas, 2006). Furthermore, the model measures the current level of delegation; this level may change over time, so measurement of these levels years later may show a different level of delegation.

This model has seven levels, with a level one manager using the most authority (and giving least freedom), while a level seven manager uses the least authority (and gives the most freedom). These levels are roughly shown in Figure 2.8 below, but they can also be briefly described to indicate the features associated with each level.

In level one (manager makes the decision and announces it), the manager is the one who identifies the problem, analyzes the possible solutions, chooses one solution, and then tells subordinates about it. Although the manager may consider the opinions of others, he or she does not give them an opportunity to participate in the decision-making process.

In level two (manager sells the decision), the manager functions the same as in level one except that he/she does not simply announce the decision but persuades the subordinates to accept it. In other words, the manager does not give subordinates an opportunity to contribute to the decision-making process but recognizes that they may resist the solution chosen; to reduce resistance, he or she will attempt to encourage subordinates to accept it by explaining how it will benefit them or why it is a necessary step to take.

In level three (manager presents idea and invites questions), the manager still engages in the decision-making process as in level one but now gives subordinates an opportunity to discuss the solution chosen. The manager is not offering others an opportunity to suggest alternatives but rather to engage in a dialogue so that subordinates can understand why a particular decision was chosen. At this level, the manager is also able to explore implications of decisions through feedback from subordinates.

In level four (manager presents a tentative decision), the manager identifies the problem, analyzes possible solutions, and then tentatively chooses one of them. Then, he or she has a meeting with others whereby the tentative solution can be discussed. Although the same kind of discussion as in level three occurs, at level four the manager is offering subordinates an opportunity to explain why that decision might be wrong and to suggest alternatives. Although the final decision still rests with the manager, subordinates now have an opportunity to influence which decision is made.

In level five (manager presents the problem, gets suggestions, makes decision), the manager identifies the problem and then goes to the group. Group discussions can now occur where everyone presents possible solutions. The manager still has his or her own solutions that could be chosen, but this level allows the manager to get more possible solutions using the knowledge and experience of individuals who may be affected by, or have to implement, the decision. After this discussion, the manager chooses the solution that he or she thinks is the best.

In level six (manager defines the limits and requests decision), the manager passes to the group the possibility of making decisions. The manager defines the problem to be solved, the boundaries or limits for whatever solution is chosen, and then participates in a

group discussion such that other subordinates not only offer solutions but also debate which solution should be chosen. The solution is chosen by the group, of which the manager may or may not be a part of.

In level seven (manager permits group to make decisions within limits), the manager defines the boundaries for solutions and then leaves the group to do the rest. Thus, the group of subordinates identifies problems, analyzes them, determines possible solutions, and chooses one of them. The manager’s role is to provide limits for any possible solution, and that is all. The manager may participate in group discussions and help to choose solutions, but does so with the same level of authority as everyone else in the group.

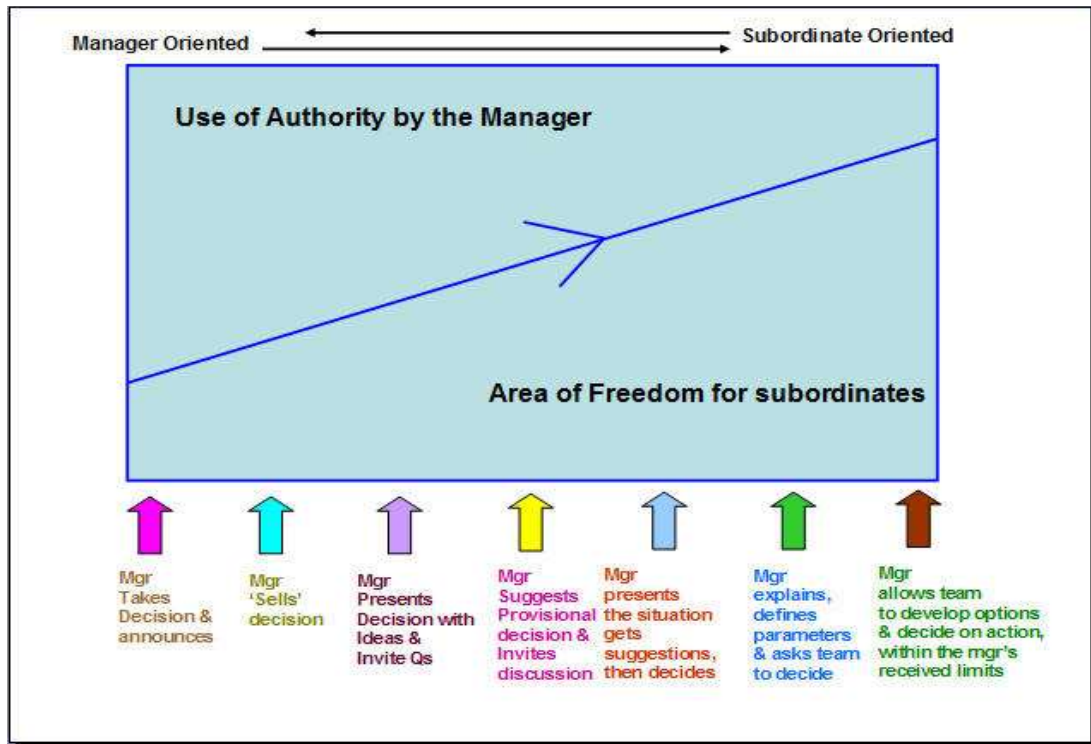


Figure 2.8. The relationship between authority and freedom in Tannenbaum and Schmidt’s model, with the seven levels they identified (Tannenbaum & Schmidt, 1973).



*Hersey and Blanchard's Situational Theory*. This theory draws upon the concept of contingency thinking, (i.e., that thinking should be dependent on the circumstances) and argues that the leadership style that should be used varies depending on the specific situation; there is no one leadership style that is the best or most universal (Hersey & Blanchard, 1969). In this theory, tasks are interpreted as being different circumstances that therefore require a different style of leadership to handle. Thus, the best leaders are those that adapt the leadership style to the current task, and change the goals and objectives of their team accordingly (Landy & Conte, 2009).

To determine the style needed to lead an individual or group for a task, the leader needs to first identify their *readiness* to perform the given task. Hersey and Blanchard described four basic readiness levels, labeled R1 to R4 (Hersey & Blanchard, 1982):

R1: basic incompetence in doing, or unwillingness to do, the task

R2: inability to perform the task, but willingness to do it

R3: competence / ability to perform the task, but unwilling or thinks they are unable

R4: competence in the task, willing to perform it, and ready to start

Once the group or individual's readiness level is identified, the leader can determine how best to guide them for accomplishing the given task. Hersey and Blanchard (1982) suggest examining two dimensions: the level of control that the leader needs over those working on the task, and the degree to which the leader needs to create a supportive relationship with those working on the task. This results in four leadership styles, roughly labeled S1 to S4. Figure 2.9 below summarizes the relationship between the readiness level and leadership style, based on level of task control and relationship support.

S1 (telling): The leader explicitly and directly tells individuals what to do. This style uses a high degree of task control but a low degree of relationship support. It is most appropriate for R1 individuals. Since they have neither interest nor competence in the task, they need a higher degree of control or direct management to accomplish the task and will not benefit much from a supportive relationship for this particular task.

S2 (selling): The leader convinces others to perform task, through social or emotional support. This style uses a high degree of task control, whereby the led individuals are told what is expected and how to do it, and a high degree of relationship support. It is most appropriate for R2 individuals, who could benefit from encouragement since they are already willing, but need explicit directions since they lack competence.

S3 (participating): The leader lets the decision-making and task performance be shared among everyone in the group. This style uses a low degree of task control, since individuals have more ownership of what they will be doing and how they choose to do it, but a high degree of relationship support. It is most appropriate for R3 individuals, who have competence in the task (needing less direct control) but are unwilling or lack the confidence to continue. Unlike the R1 situation, who are also unwilling, the R3 individuals are unwilling because they already have many tasks to perform. Hence, they need encouragement and greater agency in performing a task they are already competent in.

S4 (delegating): The leader delegate tasks to different individuals and then only monitors throughout and at the end. This style uses a low degree of task control and low relationship support. It is most appropriate for R4 individuals, whose competence and motivation to do the task are high enough that the leader need not be directly involved.

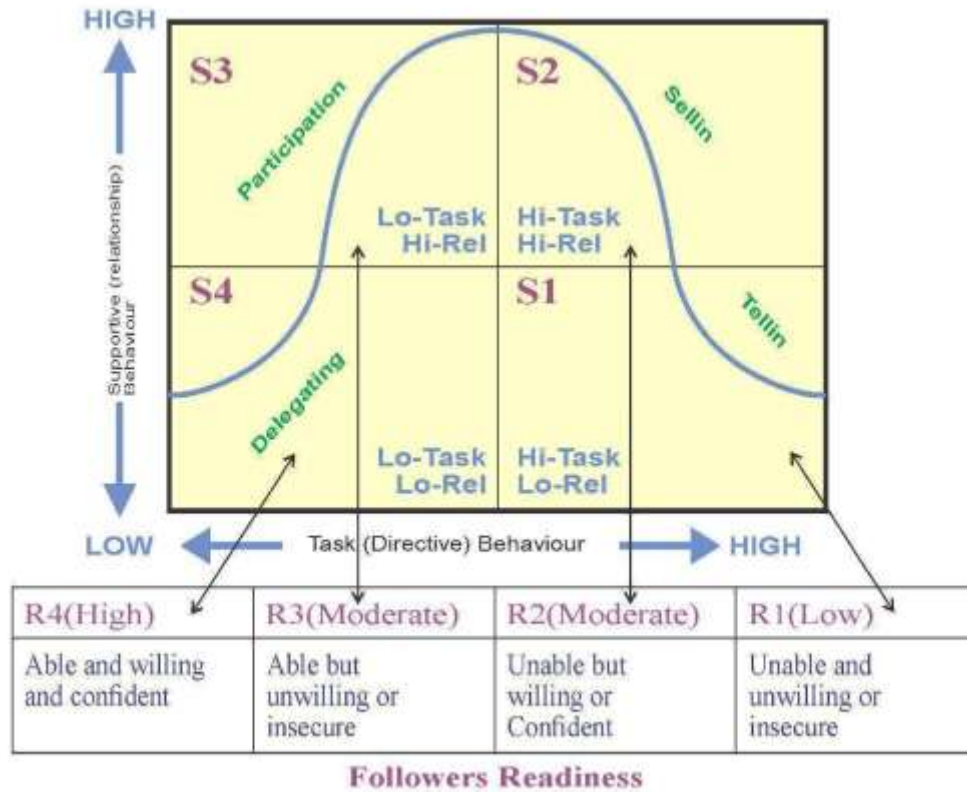


Figure 2.9. Hersey and Blanchard’s Situational Theory (from Mullins, 2010).

**Participatory Leadership Model.** This model encourages leaders to focus energy into their interaction with others. The goal of this is to encourage others to participate in the task (i.e., motivate them to work) through building respect and engaging directly with them (Giancola & Hutchison, 2005). This model helps to improve diversity, a sense of community, and shared responsibility. It also increases the learning that occurs, both individually and collectively, such that there is both individual and collective growth (Burton & Obel, 2012). In practice, leaders following a Participatory approach use every interaction that occurs as an opportunity to create meaning and purpose in the work, and to enable others to grow and transform (Giancola & Hutchison, 2005). Thus, this method ends up being a sustainable means of empowering organizations to grow and change.

***Leader-Member Exchange Theory.*** The Leader-Member Exchange (LMX) theory, initially developed by George Graen and colleagues in the 1970s (see Graen & Cashman, 1975) and revised since then, emphasizes one-on-one relationships between leaders and subordinates rather than specific traits of individuals or situations (Bauer & Erdogan, 2015). In other words, the LMX theory postulates that the kind of relationship developed between a leader and subordinate is the most important influence for motivation and task effectiveness of subordinates. Thus, the goal for the leader is to determine what kind of relationship should be created in order to create the desired outcomes.

This theory also explores the factors involved in creating relationships. For instance, how much trust is there between two people? How much do the people know about each other? What activities do they engage in? Since leaders establish closer relationships with some people than others, those closest to the leader (the in-group) enjoy, for example, stronger trust, respect, and responsibilities; those further from the leader (the out-group) tend to be more excluded from important activities and decisions. LMX theory suggests that managing the distance of various relationships leads to better outcomes such as: better work performance, lower turnover, and higher job satisfaction and organizational commitment (Steers, Porter, & Bigley, 1996).

***Substitutes for Leadership Theory.*** This theory, introduced by Kerr and Jermier (1978), explores the relationship between the behaviours and traits of a leader and subordinates' satisfaction and performance. The theory suggests that characteristics of the organization, task, and subordinates themselves may replace (i.e., substitute) or entirely negate various effects of leadership (Lussier & Achua, 2015). As a result, any observed

relationship between the behaviour of a leader and important outcomes may instead be caused (partially or wholly) by these substituted traits. Whether the behaviours are task-oriented or relationship-oriented also seemed to make no difference (Lussier & Achua, 2015; Miner, 2007). Organizational characteristics that may substitute leadership include: formalization, group cohesiveness, inflexible rules, and rewards given by the organization (not the leader). Task characteristics that may substitute leadership include how routine or repetitive the task is, and how satisfying the task is. Subordinate characteristics that may substitute leadership include ability, experience, training, and job-related knowledge (Miner, 2007). This theory has generated considerable interest due to its explanatory power and, although it continues to be empirically tested, some of its propositions are not well founded empirically (Miner, 2007).

### **Modern Leadership - Systemic Theories**

The fourth category of leadership theories is broadly titled “Systemic Theories”. These theories include: the participatory approach, systems approach, consistency approach, and organizational behaviour.

***Participatory approach.*** The Participatory Approach theory suggests that every member of a group can influence the decision making of the group. As such, the goal is to find ways to encourage every member to provide input, so that their influence in the decision-making can be felt (Jabnoun, 1994). This method has been found to improve the overall effectiveness of an organization (Bartle, 2008), making this theory a popular one to implement.

***Systems approach.*** The Systems Approach theory suggests that an organization is a system, in which all components are interrelated. Thus, the goal of the theory is to find

the most optimal way of bringing together the various parts of the organization, so that their interrelationships can provide the greatest value (Jabnoun, 1994). Furthermore, taking a systems theory approach to analyzing the organization means that all parts of the organization can be examined individually as well as in the proper context; this provides great insight into the role and impact that each component can have on the others (Stoner, Freeman, & Gilbert, 1992).

***Consistency approach.*** The Consistency Approach theory emphasizes the role that perseverance and teamwork have towards accomplishing a task. In this theory, it is necessary for effective teamwork to occur and a common goal or purpose is necessary (Abbasi, Rehman, & Bibiet, 2010). However, the theory suggests that there must be emphasis on persevering to accomplish that goal and being consistent in the work that is produced. Likewise, the organization must be engaged in long-term thinking, with long-term goals and plans made in addition to short-term ones (Jabnoun, 1994).

***Organizational behaviour.*** This is a broad grouping of theories developed by various psychologists and sociologists studying the attitudes, behaviours, and performance of individuals and groups (Cole, 1995). It is an extended, revised, and refined version of many of the behavioural theories from the earlier modern approaches, such as those developed by Chris Argyris (2010) and Kurt Lewin (1946). The theories are multidimensional and interdisciplinary, applying knowledge from many of the behavioural sciences (e.g., psychology, sociology, and anthropology) to leadership.

### **Postmodern Leadership**

While modern theories of leadership emphasize the effects and status of the leader, postmodern theories focus instead on the leadership process (Landy & Conte,

2009). In other words, postmodern theories do not focus on how a leader influences others (e.g., different ways a leader could engage with others) but rather how the leader's personal ability and influence can change the beliefs, values, and behaviours of others. This is a merging of both the pre-modern theories (where leadership qualities are important) with modern theories (where leadership behaviour and exchanges are important). The distinction between modern and postmodern leadership is the goal: modern leaders seek to improve the quality and effectiveness of work, while postmodern leaders seek to create a shared system of values and beliefs that will encourage the achievement of the goals. This section will explore four post-modern leadership theories: distributed leadership, transformational and transactional leadership, Goleman's six emotional-leadership styles, and leadership for learning organizations.

***Distributed leadership.*** Currently in the educational institutions, particularly schools, there are major issues regarding leadership and the delegation of power and authority (Grenda, 2011). To better understand these issues, one can analyze the micropolitical structure of a school. Micropolitical structure refers to the use of formal and informal authority to achieve objectives (Blase, 1991). This can broadly cover a variety of actions, whether consciously or unconsciously, such as: noticing differences between groups and individuals, motivating others and influencing motivational factors, and using authority to protect or influence others. Furthermore, both cooperative and non-cooperative actions and processes can be micropolitical (Blase, 1991).

Although micropolitics describes the way in which power is distributed and used, there are also different kinds of power that can be used. Rowlands (1997) suggested that power can be divided into four types: power over, power with, power to, and power

within. The most common form of power is 'power over,' which often has negative connotations (e.g., force, repression, coercion, corruption, abuse, etc.). Having this kind of power involves taking it from another, which leaves the one with less power dominated (such as, through politics, controlling the resources of others; see Sorensen, 2007). 'Power with' is used to find common ground among varied interests so as to create collective strength. This type of power is based on mutual support, such that it can reduce social conflict or transform it into collaboration and solidarity (Alsop, Bertelsen, & Holland, 2006). 'Power to' refers to the unique individual power each person has for modelling their own life, both in terms of understanding and setting personal goals. This type of power can greatly assist with the development of 'power with,' and encouraging citizen advocacy (Coghlan & Brydon-Miller, 2014). Lastly, 'Power within' refers to a person's sense of self-worth and self-knowledge, the capacity to identify the diversity and power of individuals while at the same time respecting others. In particular, this type of power is associated with imagination, hope, and finding a common sense of dignity and fulfilment (Coghlan & Brydon-Miller, 2014).

When combining these two concepts, micropolitics and the types of power, it is possible to determine better ways for distributing the power inherent in leadership. Since school restructuring requires both adversarial (power over) and cooperative (power with) processes, some structures and processes are more beneficial to some groups than others (Hargreaves, 2005). Furthermore, the micropolitical power of various groups and individuals is embedded within the cultural and organizational structures; this can discourage change and progress (Blase, 1991; Cusick, 1983; Duke, 1976; Gronn, 1986; Lukes, 1974; Rollow & Bryk, 1995; Sarason, 1990).



*Transformational vs. Transactional leadership.* These two leadership theories -- transactional leadership and transformational leadership -- are contrasting approaches, in that they have different attitudes towards members of an organization and overall goal with respect to the purpose of leadership.

Transactional leadership is based on the idea that the motivation of people can, and should, be developed through reward and punishment depending on performance (Lussier & Achua, 2015). Good performance is rewarded, to encourage that behaviour and increase motivation to do it again; bad performance is punished, to discourage it and decrease motivation for it. The leader developing rules and procedures, to measure performance, determine which behaviour should be rewarded or punished, and then enforces compliance to these rules. Thus, it is through rules and procedures that the transactional leader motivates people (Barman, 2009). Due to the emphasis on rules, transactional leadership is poor at adapting to change and creating change; it is far better at maintaining the current (or defined) structure of the organization and ensuring compliance with standards. It is very good at maximizing efficiency and productivity within an organization. When there are tasks or crises with clearly defined or specific goals, transactional leadership can be quite effective (Lussier & Achua, 2015). When tasks or crises require creativity or are poorly defined, it can be quite ineffective. Many of the problems currently faced by various organizations are complex and dynamic, which require creative and flexible solutions that transactional leadership is rather poor at resolving.

Transformational leadership, on the other hand, is intended to bring about change in an organization. First, leaders identify changes that are required, then they create a

vision that leads to a state where that change has been created, and then they execute the vision and guide its execution often by changing accordingly (Bass & Riggio, 2006; Lussier & Achua, 2015). The fulfilment of this vision is a means of accomplishing the change. For example, the problem in an organization could be lack of innovation. The changes required for this could include: a culture that is open to new ideas, programs to generate ideas, processes for sharing and analyzing new ideas, and so on. The leader would then create a vision that includes all these desired changes, but for the vision to become actualized the people in the organization must also change. To motivate people to follow this vision then, leaders work to improve their sense of self and connection; in other words, they use self-empowerment so that people are willing and capable of making the changes needed for the vision to become a reality (Lussier & Achua, 2015). For example, by connecting someone's identity to a project, and the group's identity to the whole organization, they can become more motivated to see the desired change occur within the project and organization. Therefore, transformational leadership can be very effective at encouraging and developing individual, and collective, growth as well as handling complex or poorly defined tasks (as these require creativity in their solution) (Nongard, 2014). However, it is less effective than transactional leadership at increasing the efficiency of the existing situation without creating change (Nongard, 2014). This is because the increase in efficiency only arises after significant changes have occurred, and without those changes there can be no increase in efficiency using transformational leadership.

*Goleman's Situational Leadership (Six Emotional Leadership Styles).* This theory explores the attitudes, goals, and behaviours of leaders in different situations. The

purpose of this model is to help identify the style of leadership that would be most effective for a given situation (Goleman, 2002). Simply taking the approach of a successful leader in one situation and using it in a different situation may not actually work, as there can be differences in the organization, problems, and tasks that can make applying the approach impossible (Fairholm & Fairholm, 2009). Rather than look to other leaders for inspiration then, the purpose of this model is to identify various circumstances and effective responses; the leader then needs to learn how to identify the circumstance, match it to the closest ones in the model, and then adapt his or her style to the ideal responses. This means that a leader following this model is actually working with several styles of leadership, and is moving between them depending on the situation. Thus, the most effective use of Goleman's situational leadership occurs after all the styles and situations have been mastered, so that any can be used as necessary (Fairholm & Fairholm, 2009). In general, six leadership styles have been identified (Kubiak, 2012) and these are explained in more detail below.

*Visionary/Authoritative.* This kind of leader has the knowledge and experience for how to solve some given problem, and uses that knowledge to solve the problem. This style of leadership is most effective when leading a group that lacks the necessary knowledge or motivation.

*Coaching.* This kind of leader has clearly defined the tasks and roles for him or herself and others in the group, and maintains a high level of communication among participants. This style encourages two-way communication between people. Thus, this style of leadership is most effective when the group has the necessary knowledge and experience, and everyone simply needs to be aware of the state and goals of the project.

*Affiliative.* This kind of leader works to improve morale, encourage communicate, and promote harmony between members of the group. The goal is to ensure that all members enjoy each others' company and want to remain working together. This style of leadership is most appropriate when morale is low, and when personal problems between people begin to negatively affect productivity; furthermore, the resolution of these problems needs to be real rather than just encouraging them to "get along better." Since this style can result in the leader becoming well-liked and praised, using it for too long can make it difficult to critique or improve poor performance.

*Democratic.* This kind of leader encourages others to participate in the decision-making process, so that it becomes democratic. This can lead to improved motivation and participation, but requires clearly defined roles, expectations, and channels of communication; otherwise, the work required by people becomes too much for them. This leadership style can be the most effective in general, but requires knowledgeable and experienced group members.

*Pacesetting.* This kind of leader applies pressure to others to maximize their efficiency and use of time. For instance, as a deadline approaches the leader applies increasing pressure on the group to finish the project; in another case, the leader notices two members of the group are starting to struggle and removes pressure from them (i.e., moves their work to someone else, adjusts deadlines, determines what caused this problem) while maintaining the same pressure on the rest. This leadership style is more effective for highly motivated and skilled groups, as their pace can be more easily adjusted without harm.

*Commanding/Coercive.* This kind of leader makes decisions solely by

him/herself, and enforces a strict and direct focus on specific goals. This style of leadership is most effective for organizations that need a fast turnaround for some project. In the short-term, this leadership style can be effective but it can be very damaging to morale in the long-term.

Table 2.3.

*Summary of the six leadership styles in Goleman’s Situational Leadership (Goleman, 2002)*

	Visionary/ Authoritative	Coaching	Affiliative	Democratic	Pacesetting	Commanding / Coercive
Nickname	The Visionary	The Nurturer	The people person	The listener	The superman/ superwoman	The dictator
Impact on organization	Extremely Positive	Very positive	Positive	Positive	Often very negative	Negative when not in crisis
Phrase used	Come with me	Try this	People come first	What do you think	Do as I do	Do what I tell you
Characteristics	Inspirational empathetic, open, sharing	Listens, counsels, encourage	Collaborative creates harmony	Collaborative, influencer, team-player	Hands-on, impatient, data-driver	Threatening demanding controlling
Emotional intelligence competencies	Self-confidence, empathy, change, catalyst	Developing others, empathy, self-awareness	Empathy, building, relationships, communication	Collaboration, team leadership, communication	Conscientiousness, drive to achieve, initiative	Drive to achieve, initiative, self-control
When appropriate	New direction is required or goals require clarification	Improving people’s strengths, building future leaders	Creating teams and healing dysfunctional relationships	Seeking to involve a group of people in the decision-making	Raising the standard when a competent & motivated team is working well	Emergencies occur, time is short, severe situations have set in

**Leadership in Islamic contexts**

Up to this point, the discussions surrounding leadership are from the perspective of Western researchers and thinkers. Leadership has also been explored in the context of Islam, a perspective that is generally not taken by Western researchers. While there can

be overlap between the Western theories of leadership and those within the context of Islam, there are several unique factors to leadership in an Islamic context. Note again that the term “Western leadership” is meant to denote recent leadership theories arising from Western countries (e.g., the United States, Canada, the United Kingdom, France, etc.). The strength of secularism in these countries is such that leadership theories avoid the religious dimension, and many businesses as well as most governmental organizations such as public schools avoid using any particular religious ideology as their foundation. It is of course possible to have leadership theories based on other religions, such as Christianity, but such theories are not strongly or popularly discussed by academics; as this chapter has so far shown, the popular Western theories do not mention religion or a deity at all and certainly do not consider such things as fundamental to being a leader or exercising leadership.

*Islamic context.* Although historically the term “Islamic World” referred to only a handful of countries, the 20th century saw the formation of a very different kind of world. Some countries became independent after the end of World War I, while others became part of the Soviet Union. With the collapse of the Soviet Union at the end of the Cold War, many of the Muslim-majority areas became independent countries (e.g., Kazakhstan, Tajikistan, Uzbekistan) (Naji & Jawan, 2013; Sisk, 1992). However, since the Cold War, many Muslim-majority countries have experienced continued internal problems such as civil wars, ethnic rivalries and conflicts, and even wars with other countries (often the United States of America; Naji & Jawan, 2013). Although many of these problems were caused by internal fracturing and power-seeking behaviour of various interest groups there has also been external influence on such conflicts. In 2010,

the Islamic countries produced more than 43% of the world's oil (OPEC, 2011); likewise, the Middle East is thought to hold roughly 60% of the total world reserves for gas and oil (Correlje & der Linde, 2006). In addition, there are several strategic locations throughout the Islamic world (e.g., Suez Canal, Dardanelles, Bosphorus Strait, etc.) that have been the cause of various geopolitical conflicts (Naji & Jawan, 2013; Sisk, 1992).

Despite the strategic importance of the Middle East, the international presence is rather mixed. Formally, there is the Organization of Islamic Cooperation (OIC), which operates as collective voice for Muslims in 57 countries (OIC, 2012). Politically neutral, and Islamic in orientation, it primarily focuses on promoting international dialogue and peaceful means of resolving conflicts. Informally, only five Islamic countries seem to have significant influence in international geopolitical affairs: Saudi Arabia, Iran, Turkey, Egypt, and Malaysia (with Indonesia) (Naji & Jawan, 2013; Mandaville, 2010). These countries have influence as a result of their ideological power to influence and cooperate with other Islamic countries, and because of their material resource strength (e.g., oil, natural gas). Both of these factors are significant for influencing geopolitics or resolving international problems; the ideological strength of Islam alone has been considered the successor to the Marxist-Leninist ideology of the Cold War given Islam's ability to mobilize large groups of people (Flint & Taylor, 2007).

However, none of the Islamic countries seem strong enough to be a sole contender against other dominant players internationally, such as the United States of America, the European Union, Russia, and China (Naji & Jawan, 2013; Sisk, 1992). Instead, it seems more plausible for them to influence various outcomes by acting collectively. However, this can also be problematic. Acting collectively requires some degree of unity, which is

typically evidenced by respecting the diversity of the group while still working together to reach a common goal (e.g., Merriam-Webster). Some in the Islamic world emphasize obedience to the religion of Islam itself (i.e., following the Islamic law), claiming this will result in unity. They further take the position that trying to achieve unity in a way that does not require Islam is unacceptable (Chowdhury, 2002). The reasoning behind such an emphasis is often founded on the concept of Islamic leadership (see below), in that a leader cannot follow his own choice or the desires of the group but must act purely to execute the will of Allah on Earth (Naji & Jawan, 2013). However, since the will of Allah on Earth is often considered a prerequisite for following Islamic Law, this can be difficult to do in practice since there is disagreement over what constitutes Islamic Law between conflicting sects and even within the same sect of Islam.

*Uniqueness of Islamic leadership.* One major difference between Islamic leadership and other kinds of leadership is that Islamic leadership is founded on the Quran and accepted Hadiths<sup>3</sup> (Aabed, 2006; Khan, 2008). In the Quran, God addresses humans as his representatives or vice-regents on Earth, providing them with all the skills, principles and tools needed to lead their lives, and the lives of others, towards glory and realizing their fullest potential:

And Allah is the One Who has made you generations coming after Generations, replacing each other on the earth. And Allah has raised you in Ranks, some above the others, in order That He may try you in what He has Bestowed upon you.

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<sup>3</sup> Hadiths are traditions (i.e., quotes and stories) ascribed to the Prophet Muhammad, typically quoted from one of several compilations, or those of his companions. Some traditions are accepted by all sects of Islam, while others are only accepted by some. For instance, the Twelver branch of Shia Islam, currently in power in Iran, considers traditions ascribed to particular historical leaders (the Twelve Imams) as acceptable while Sunnis (dominant in Turkey) do not.



Verily, your Creator & Nurture is the Swift-Retributing, and yet verily, He is The Merciful Forgiving. (Quran 6: 165)<sup>4</sup>.

In the Islamic tradition then, humans, as representatives of God, are given great faculties and qualities which, if properly used, could result in the achievement of miraculous goals. This provides a pre-modern (e.g., supernatural<sup>5</sup>) position that the source of leadership is ultimately derived from God. Consistent with the pre-modern position, great men of the past are analyzed as exemplars of leadership: typically this involves using the habits and behaviours of Mohammad and the first four Caliphs (i.e., the first leaders of the Muslim community) as sources of inspiration and guidance regarding how a leader should behave (Wirba, 2017; Khan, 2008). Such information can be gathered from the Hadiths. The Quran indicates that Mohammad is an example of leadership: “For you the life of prophet is a good model of behaviour” (Quran, 33:21). The first four Caliphs are considered good examples because of the prosperity of that time, though other leaders could also serve as examples (Wirba, 2017; Khan, 2008).

A second major difference between Islamic and other kinds of leadership is that Muslim leaders are expected to follow the rules, laws, and guidelines given by Allah and not their own personal preferences nor the desires of their followers (Ankerberg & Burroughs, 2008; Aabed, 2006). For example, consider this quotation from the Quran on this topic: “And we made them leaders guiding men by our command and We sent inspiration to do good deeds, to establish regular prayers, and to practice regular charity;

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وَهُوَ الَّذِي جَعَلَكُمْ خَلَائِفَ الْأَرْضِ وَرَفَعَ بَعْضَكُمْ فَوْقَ بَعْضٍ دَرَجَاتٍ لِيُبْلِغَكُمْ فِي مَا آتَاكُمْ إِنَّ رَبَّكَ سَرِيعُ الْعِقَابِ وَإِنَّهُ لَغَفُورٌ رَحِيمٌ

<sup>5</sup> A person with a modernist or, more likely, post-modernist worldview could still believe in God; the main point here is not belief in God but that leadership is derived from God, and the evidence for this derivation is primarily from religious scripture and tradition.

and they constantly served Us only” (Quran, 21:73). Although Muslim leaders are expected to guide, protect, and look after their followers, they are supposed to act in accordance with Islamic law above all else. In other words, Muslim leaders have an obligation to both their followers and to Allah (Khan, 2008).

A leader’s obligation to Allah is strongly related to following a moral code (Mohammad, Mohammad Ibrahim, Abdul Salam, Jamil, & Quoquab, 2015). On one hand, Muslim leaders have practical issues to consider depending on the immediate and long-term problems facing their followers. On the other hand, such leaders also have moral problems and must focus on maintaining a high moral standard; it is this standard that represents their obligation to Allah (Khan, 2008). Leaders can develop and implement this moral standard by moving through four stages: 1) Imam, the leader believes in Allah, submits his will to Allah’s Will, and feels responsible for his actions; 2) Islam, the leader achieves peace with Allah, in that his submission is willing, voluntary, and not forced; 3) Taqwa, the leader develops a consciousness of his duty and accountability, and become highly aware of how ethically and justly he may (or may not) be behaving; and 4) Ihsan, the leader develops a love for and desire to worship Allah, which provides internal motivation to behave ethically and productively (Beekun & Badawi, 1999).

A third major difference between Islamic leadership and Western leadership, as argued by Mohammad and colleagues (Mohammad et al., 2015), is that Islamic leadership has a much stronger spiritual and religious dimension to it. This can be seen in how Islamic leadership: 1) is characterized by religious and spiritual behaviour (i.e., following Quranic law); 2) emphasizes motivation from a spiritual sources (e.g., the

Quran, prayer, etc.); and 3) is oriented towards people and not products (Ankerberg & Burroughs, 2008; Al-Buraey, 1985). The human orientation can be seen as a combination of transformational leadership, servant leadership, and participatory leadership approaches (Mohammad et al., 2015).

Transformational leadership tends to focus on the process of transformation rather than the content (i.e., the idea that leaders should enable and facilitate growth and change in followers, but not what the change should be). Islamic leadership is transformational in both ways: leaders should actively work to enable and facilitate transformation in their followers, and the transformation should be in terms of behaviours and attitudes so that they are more consistent with Islamic values (Abed, 2006; Beekun & Badawi, 1999). The greatest example of this is considered to be Mohammad (e.g., see Ahmed, 2010) because of how, during his lifetime, many Arabs were transformed from being polytheistic, socially fragmented, and plagued with tribal conflicts into a single monotheistic, united, and internally-cooperative group of people despite tribal, ethnic, and religious backgrounds.

In terms of servant leadership, this is the concept that the leader should be a servant of others (i.e., that the leader should serve followers) (Abed, 2006; Wirba, 2017). This is promoted in Islamic leadership by the attitudes a leader should have towards his or her followers, namely that of serving, supporting, guiding, and guarding or protecting them. In the context of an organization like education, the leader would be a servant in terms of supporting others so that they can maximize their potential (Rush, 2002). Again, emphasizing the role of Mohammad as an example, he is considered a role model for a servant leader (Chowdhury, 2002; Wirba, 2017). He provided the support and

guidance that ultimately helped his followers become more prosperous, he served in person rather than delegating this (e.g., comforting and listening to others in person), and focused on the needs of individuals first over any institutional or organizational needs (Mohammad et al., 2015). This approach can be combined with transformational leadership, such that the leader serves others in a way that leads to the internal transformation or growth needed for them to maximize their potential (Stone et al., 2003).

Islamic leadership is also participatory, in that people other than the leader are involved in decision making (Aabed, 2006). This concept is found in the Quran: “And consult them in affairs, then, when you have taken a decision, put your trust in Allah, for Allah loves those who put their trust in Him.” (Quran 3:139) Furthermore, the aspects of transformational and servant leadership are seen as participatory in that the process of service and transformation are shared; leaders and followers work together so that the necessary growth occurs, and this process requires the combined and shared effort of all (Northouse, 2012; Roueche, Baker III, & Rose, 2014).

As is the case with any leadership theory though, there will be differences depending on how things are implemented. For instance, the first four Caliphs of Islam are looked at as examples because they are considered great leaders; there have been many other Caliphs throughout the history of Islam that are not used as examples, typically because they did not implement the concepts of Islamic leadership just discussed (e.g., they were not servants, or served themselves instead of Allah, or they failed to transform their followers in a way consistent with Islamic values, etc.) (Mohammed & Hussain, 2015). Similarly, which aspects of Islamic leadership are emphasised can change how it is classified in terms of era. From a purely supernatural

perspective, it is clearly pre-modern. Its emphasis on creating order and following laws is a very modernist orientation. When emphasizing participatory and transformational leadership, this is clearly postmodern. Thus, it is necessary to classify Islamic leadership separately from these contexts and examine how it is implemented in order to determine its appropriateness for a global society.

***Leadership by Islam - characteristics.*** One of the more popular leadership theories that attempts to implement Islamic Leadership principles is called Leadership by Islam (LBI; see Abbasi et al., 2010), which sets out the necessary characteristics of an Islamic leader and appropriate styles of Islamic leadership. Although these characteristics could be emphasized in Western leadership theories, in LBI the need for these characteristics and their definitions or meaning as presented below is derived from various interpretations of the Quran and the accepted Hadiths (Abbasi et al., 2010). This is not the case with Western leadership theories.

Accountability is defined as a person's willingness and ability to be held accountable for his or her decisions and *actions* (Islamic Guidance Society, 2001). A leader with accountability will readily explore and discuss the results of his or her actions with others, regardless of whether the results were positive or negative (Bovens, 2005). In contrast, a leader without accountability may frequently engage in scapegoating or blaming, or simply create rules that prevent him or her from being held accountable for failures. In LBI, accountability is considered a necessary characteristic (Islamic Guidance Society, 2001). The main benefit of high accountability is the image of trustworthiness that is conveyed to others, encouraging others to follow and implicitly improving their performance (Bovens, 2005). Quotations from the Quran that seem to encourage

accountability include the following two: “Then he who has done a particle-weight of good shall see it, [and shall receive the reward for it], And he who has done a particle-weight of evil shall see it [and shall receive the recompense for it]” (Quran, 99:7-8)<sup>6</sup>.

On the Day of Judgement no sinner can help another person with the burden of his sin and if he who is heavily loaded should call another to bear his load, he will not be aided though the one whom he has asked for help be of his near kinsmen. [O, messenger] you can only warn those who fear their Unseen creator and who perform prayer and pay alms. And whoever purifies himself [From the filth of polytheism, hypocrisy and other sins] he does it to the benefit of himself because the return of all is to Allah [and the process of reckoning will surely take place]. (Quran, 35:18)<sup>7</sup>.

These can be interpreted to mean that people should accept what is expected of them, to see the results of their actions, and be willing to act in a trustworthy manner (Bovens, 2005). Historically, many Islamic leaders have insisted on their accountability to Allah and His Messenger, but not necessarily other people (Islamic Guidance Society, 2001; Mitchell, 1993). This has been derived from several places in the Quran. One example is: “Allah will not call you to account for that which is not intentional in your oaths, but He will call you to account for that which your hearts have intended and Allah is the Tolerant for giving” (Quran, 2:225)<sup>8</sup>. Another example is: “And be afraid of the

6

فَمَنْ يَعْمَلْ مِثْقَالَ ذَرَّةٍ خَيْرًا يَرَهُ (٧) وَمَنْ يَعْمَلْ مِثْقَالَ ذَرَّةٍ شَرًّا يَرَهُ

7

وَلَا تَزِرُ وَازِرَةٌ وِزْرَ أُخْرَىٰ ۗ وَإِن تَدْعُ مُثْقَلَةٌ إِلَىٰ جِمْلِهَا لَا يَحْمِلُ مِنْهُ شَيْءٌ وَلَوْ كَانَ ذَا قُرْبَىٰ ۗ إِنَّمَا تُنذِرُ الَّذِينَ يُحْسِنُونَ رَبَّهُمْ بِالْغَيْبِ وَأَقَامُوا الصَّلَاةَ ۗ وَمَنْ تَرَكَهُ فَبِمَا يَنْزِكُنِي لِنَفْسِيهِ ۗ وَإِلَى اللَّهِ الْمَصِيرُ

8

لَا يُؤَاخِذُكُمُ اللَّهُ بِاللَّغْوِ فِي أَيْمَانِكُمْ وَلَكِنْ يُؤَاخِذُكُمْ بِمَا كَسَبْتُمْ قُلُوبَكُمْ ۗ وَاللَّهُ عَفُورٌ حَلِيمٌ

Day when you shall be brought back to Allah; then every person shall be paid in full what He has earned, and none shall be dealt with unjustly” (Quran, 2:281)<sup>9</sup>. A third example is:

But how will it be with them when we gather them together [on the Day of judgement] about which there is no doubt? And every soul shall be paid in full that which he has

And a fourth example is: earned and no one shall be wronged. (Quran, 3:25)<sup>10</sup>

The Divine recompense will not be in accordance with the desire of you, [Muslims], nor the desire of the people of the Book: whosoever does evil will have the recompense accordingly and he will not find any protector or helper besides Allah. (Quran, 4:123)<sup>11</sup>

For the most part, this creates a hierarchical (vertical) organizational structure and can lead to problems whereby a leader actively avoids accountability to other people.

Proficiency is the quality of one’s work, such that a highly proficient person will use only a minimal amount of effort to accomplish something well (Al habshi & Ghazali, 1994). This is not meant to define a lower boundary for the effort required, but rather to say that highly proficient people are willing to push themselves beyond the necessary tasks, have the energy for higher performance and efficiency, and willingly sacrifice time to accomplish some task (Beekun & Badawi, 1999). It is largely about performance.

Proficient people will have higher performance at work, not simply from skill but mainly

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9

يُظَلَّمُونَ كَسَبَتْ وَهُمْ لَا إِلَهَ إِلَّا اللَّهُ ثُمَّ نُوفِيَ كُلُّ نَفْسٍ مَّا تَرَجَعُونَ فِيهِ إِلَى يَوْمِهَا وَاتَّقُوا

10

فَكَفَيْتَ إِذَا جَمَعْنَاهُمْ لِيَوْمِ لَأَرْيَبَ فِيهِ وَوَفَيْتَ كُلُّ نَفْسٍ مَّا كَسَبَتْ وَهُمْ لَا يُظَلَّمُونَ

11

لَيْسَ بِأَمَانِيكُمْ وَلَا أَمَانِي أَهْلَ الْكِتَابِ مَنْ يَعْمَلْ سُوءًا يُجْزَ بِهِ وَلَا يَجِدْ لَهُ مِنْ دُونِ اللَّهِ وَلِيًّا وَلَا نَصِيرًا

from attitude (Beekun & Badawi, 1999). This characteristic is not explicitly mentioned in the Quran, but is derived as an implication from quotations such as:

And they also admonished him saying: use some of the wealth which Allah has bestowed on you for your Hereafter by spending in charity. Do not forget that your portion of worldly life have some limit, you should spend the rest; and be good and generous to the people as Allah has been good and generous to you; and do not make mischief due to your worldly power and wealth since Allah does detest the corrupt. (Quran, 28:77)<sup>12</sup>.

Responsibility is the degree to which a leader acts in accordance with expectations and requirements. A responsible leader knows what is expected of him or her and acts so as to fulfill those expectations (DeKrey, Lima, & Tritus, 1998). An irresponsible leader either does not know those expectations, or knows them but acts however he or she wants instead. Although the words “responsibility” and “accountability” are often used synonymously, there are differences between them. Leaders with accountability receive the reward or punishment appropriate for their actions, while those without accountability do not; they only receive reward, are only punished (i.e., scapegoated), or receive neither reward nor punishment. In contrast, those with responsibility will act based on the expectations, goals, or requirements regardless of the outcome (Atkeson & Maestas, 2012; Lazar, 2014). Leaders without responsibility will just do whatever; they do not care what is required. Thus, leaders without responsibility but with accountability will do whatever they want but will be punished when they fail to live up to expectations. In contrast, leaders without responsibility *and* accountability will



do whatever they want and will suffer no penalties for doing so. While responsibility can be discussed in a general sense, the Quran emphasizes responsibility to Islam and doing that which is good:

Whatever of good reaches you (O, man) it is from Allah, but whatever of evil befalls you, it is from yourself. And (O, Messenger) we have sent you as a messenger to mankind (all) and Allah is sufficient as a Witness over this highly important issue. (Quran, 4:79)<sup>13</sup>.

Some interpret the above quotation to mean that people are responsible for their actions to ensure that they are obedient to Allah, while others interpret it to mean that good can only come from Allah and that people cannot be responsible for any action which is good (Postiglione & Tan, 2007). Those who reject Islam have other responsibilities, such as “Whosoever obeys the Messenger, thereby, obeys Allah; and those who turn away (from the Right Path, they should know) we have not sent you (O, Messenger) to be a watcher over them” (Quran, 4:80)<sup>14</sup> and

Verily, those who divided the religion and have become sects, (O, Messenger) you should have no concern in them in the least; their affair is only with Allah Who then (on the Resurrection Day) will inform them about what they used to do. (Quran, 6:159)<sup>15</sup>.

Justice is the degree of fairness, equity, and moral good that a person performs. A just person will be fair and equitable, while an unjust person will not (Abbasi, Hameed, &

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مَا أَصَابَكَ مِنْ حَسَنَةٍ فَمِنَ اللَّهِ وَمَا أَصَابَكَ مِنْ سَيِّئَةٍ فَمِنَ نَفْسِكَ وَأَرْسَلْنَاكَ لِلنَّاسِ رَسُولًا وَكَفَى بِاللَّهِ شَهِيدًا

14 مَنْ يُطِيعِ الرَّسُولَ فَقَدْ أَطَاعَ اللَّهَ وَمَنْ تَوَلَّىٰ فَمَا أَرْسَلْنَاكَ عَلَيْهِمْ حَفِيظًا

15

إِنَّ الَّذِينَ فَرَّقُوا دِينَهُمْ وَكَانُوا شِبَعًا لَسْتَ مِنْهُمْ فِي شَيْءٍ إِنَّمَا أَمْرُهُمْ إِلَى اللَّهِ ثُمَّ يُنَبِّئُهُمْ بِمَا كَانُوا يَفْعَلُونَ

Bibi, 2011; Abbasi et al., 2010; Ather & Sobhani, 2007). This characteristic is fundamental to leadership (Beekun & Badawi, 1999), such that without justice the individual and collective state of people cannot function properly (Murphy, 1999). Having just leaders improves performance, satisfaction, and protection of members of an organization as well as improves the accountability and responsibility of leaders (Abbasi et al., 2011; Abbasi et al., 2010; Ather & Sobhani, 2007). Likewise, it is a necessary characteristic in the Quran:

Verily, Allah commands you to establish justice and goodness (in the community) and be generous to your relatives, and he forbids you all evil and indecent deeds and rebellion against the Truth. This is Allah Who enjoins you so that you may receive admonition. (Quran, 16:90)<sup>16</sup>.

Some researchers (e.g., Dawkins, 2008; Winn, 2004) have argued that there are statements in the Quran that promote unjust behaviour, or have been interpreted as such.

For example:

A believer should never kill a believer unless it is by mistake and whosoever kills a believer by mistake must set free a believing slave and blood-wite should be paid to the family of the killed person unless they remit it as a free-will offering. If the killed person belongs to a people at war with you and he is a believer, then setting free a believing slave is a duty. And if the killed person belongs to a people with Whom you have a treaty, then blood-wite is to be paid to his family and the slayer shall set free a believing slave. And whoso finds the (freeing a slave) beyond his ability, two months fasting successively by way of repentance

to Allah (is Ordained); for Allah is the Absolute Knowing Decree. (Quran, 4:92)<sup>17</sup>.

However, fighting against non-believers has the instruction to:

kill them wherever you get hold of them and drive them out from where they have driven you out; since the evil of disbelief and polytheism is more grievous than killing, but do not fight them at the Sacred Mosque unless they fight with you therein, (and you be in a defence position), so if they fight with you there, kill them; such is the recompense of the disbelievers (Quran, 2:191)<sup>18</sup>.

Likewise, there are statements that seem to favour men over women:

Men are overseers and maintainers of women because Allah has made one of them excel to the other, and because they, (the husbands) provide the livelihood of the family. Therefore, righteous women are obedient and guard in the husband's absence what Allah orders them to guard. As to those women on whose part you see ill-conduct, admonish them [first], [next] refuse to share their beds, [and last] beat them lightly, but if they return to obedience, do not seek against them means of annoyance; verily, Allah is the Sublime Great. (Quran, 4:34)<sup>19</sup>;

And slavery is merely regulated instead of abolished:

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وَمَا كَانَ لِمُؤْمِنٍ أَنْ يَقْتُلَ مُؤْمِنًا إِلَّا خَطَأً وَمَنْ قَتَلَ مُؤْمِنًا خَطَأً فَتَحْرِيرُ رَقَبَةٍ مُؤْمِنَةٍ وَدِيَةٌ مُسَلَّمَةٌ إِلَىٰ أَهْلِهِ إِلَّا أَنْ يَصَدَّقُوا فَإِنْ كَانَ مِنْ قَوْمٍ عَدُوٍّ لَكُمْ وَهُوَ مُؤْمِنٌ فَتَحْرِيرُ رَقَبَةٍ مُؤْمِنَةٍ وَإِنْ كَانَ مِنْ قَوْمٍ بَيْنَكُمْ وَبَيْنَهُمْ مِيثَاقٌ فَدِيَةٌ مُسَلَّمَةٌ إِلَىٰ أَهْلِهِ وَتَحْرِيرُ رَقَبَةٍ مُؤْمِنَةٍ فَمَنْ لَمْ يَجِدْ فَصِيَامَ شَهْرَيْنِ مُتَتَابِعَيْنِ تَوْبَةً مِّنَ اللَّهِ وَكَانَ اللَّهُ عَلِيمًا حَكِيمًا

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وَأَقْتُلُوهُمْ حَيْثُ ثَفِفْتُمُوهُمْ وَأَخْرِجُوهُمْ مِّنْ حَيْثُ أَخْرَجُوكُمْ وَالْفِتْنَةُ أَشَدُّ مِنَ الْقَتْلِ وَلَا تُقَاتِلُوهُمْ عِنْدَ الْمَسْجِدِ الْحَرَامِ حَتَّىٰ يُقَاتِلُوكُمْ فِيهِ فَإِنْ قَاتَلُوكُمْ فَاقْتُلُوهُمْ كَذَلِكَ جَزَاءُ الْكَافِرِينَ

19  
الرِّجَالُ قَوَّامُونَ عَلَى النِّسَاءِ بِمَا فَضَّلَ اللَّهُ بَعْضَهُمْ عَلَىٰ بَعْضٍ وَبِمَا أَنْفَقُوا مِنْ أَمْوَالِهِمْ فَالصَّالِحَاتُ قَانِتَاتٌ حَافِظَاتٌ لِّلْغَيْبِ بِمَا حَفِظَ اللَّهُ وَاللَّاتِي تَخَافُونَ نُشُورَهُنَّ فَعِظُوهُنَّ وَاهْجُرُوهُنَّ فِي الْمَضَاجِعِ وَاضْرِبُوهُنَّ فَإِنْ أَطَعْنَكُمْ فَلَا تَبْغُوا عَلَيْهِنَّ سَبِيلًا إِنَّ اللَّهَ كَانَ عَلِيمًا كَبِيرًا

Allah has preferred some of you above others in sustenance, but those preferred ones do not share their provision with those slaves they own, so that they be equal in that respect. Is it the bounty of Allah that they deny? (e.g., Quran 16:71)<sup>20</sup>.

***Leadership by Islam - Approaches.*** LBI tends to use a holistic perspective for leadership, looking at the whole organization, people, and/or culture (Abbasi et al, 2010). To differentiate between circumstances and appropriate leadership styles, there are different approaches to leadership that can be used. In this sub-section, four such approaches will be discussed: participatory, systems approach, contingency, and consistency. Again, these are partly derived from the Quran.

The participatory approach for LBI enables each member of the group to provide input or influence in decision-making (Jabnoun, 1994). By doing so it not only improves the quality of decision making but also seems to improve effectiveness of the organization (Bartle, 2008). In the Quran, people are encouraged to consult with others:

(O, Messenger) Thus, it is a Grace of Allah that you were gentle to Those (who disobeyed in Uhud); had you been tough or hard-hearted, they would have surely dispersed away from around you, therefore forgive them and seek pardon for them from Allah; and consult them in the affair, but when you resolve a matter, then put your trust in Allah alone, for Allah is Affectionate to those who put their trust in Him” (3:159)<sup>21</sup>

Also, there is a reward for those who consult with others:

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وَاللَّهُ فَضَّلَ بَعْضَكُمْ عَلَى بَعْضٍ فِي الرِّزْقِ ۖ فَمَا الَّذِينَ فُضِّلُوا بِرَادَىٰ رِزْقِهِمْ عَلَىٰ مَا مَلَكَتْ أَيْمَانُهُمْ فَهُمْ فِيهِ سَوَاءٌ ۗ أَفَبِعِزَّةِ اللَّهِ يَجْحَدُونَ  
21

فَبِمَا رَحْمَةٍ مِنَ اللَّهِ لِنْتَ لَهُمْ وَلَوْ كُنْتَ فَظًّا غَلِيظَ الْقَلْبِ لَانْفَضُّوا مِنْ حَوْلِكَ فَاعْفُ عَنْهُمْ وَاسْتَغْفِرْ لَهُمْ وَشَاوِرْهُمْ فِي الْأَمْرِ ۚ فَإِذَا عَزَمْتَ فَتَوَكَّلْ عَلَى اللَّهِ ۚ إِنَّ اللَّهَ يُحِبُّ الْمُتَوَكِّلِينَ

(The believers who put their trust in their Creator are) Those who respond to the call and Command of their Creator, and perform their prayers regularly, and for running their affairs they employ mutual consultations among themselves, and spend in Allah's way out of what we have given them as sustenance. (42:38)<sup>22</sup>.

Such statements have led to consultation being a valuable enterprise in Islam (Daryabadi, 1998) and a fundamental pillar of what it means to be a Muslim (Maududi, 2005d). In addition to the Quranic references, the importance of consulting with others is derived from the Hadith; since Muhammad consulted with other groups in the early days of Islam, this led to consultation becoming part of the culture and the religious life in Sunni Islam (Abbasi et al, 2010; Jabnoun, 1994). However, consultation with enemies seems to be discouraged given the statements that encourage killing them instead of talking:

(O, you Muslims) fight those from among the people of the book, who do not believe in Allah and nor in the Last Day and those who do not prohibit what Allah and His Messenger have prohibited and those who do not follow the Religion of Truth [Islam], until they pay tributary tax with their own hands, while feeling subjected and disgraced. (Quran, 9:29)<sup>23</sup>.

The systems approach for LBI brings together various parts of an organization or group with the goal of examining it as a whole or working as a harmonious collective (Jabnoun, 1994). This enables understanding both the individual parts of the system (e.g., individual people within a group) and the overall system itself (e.g., how the different parts affect or depend on each other; Stoner et al., 1992). Although the Quran does not

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وَالَّذِينَ اسْتَجَابُوا لِرَبِّهِمْ وَأَقَامُوا الصَّلَاةَ وَأَمْرُهُمْ شُورَى بَيْنَهُمْ وَمِمَّا رَزَقْنَاهُمْ يُنْفِقُونَ  
23

قَاتِلُوا الَّذِينَ لَا يُؤْمِنُونَ بِاللَّهِ وَلَا بِالْيَوْمِ الْآخِرِ وَلَا يُحَرِّمُونَ مَا حَرَّمَ اللَّهُ وَرَسُولُهُ وَلَا يَدِينُونَ دِينَ الْحَقِّ مِنَ الَّذِينَ أُوتُوا الْكِتَابَ حَتَّى يُعْطُوا الْجِزْيَةَ  
عَنْ يَدٍ وَهُمْ صَاغِرُونَ

explicitly discuss this kind of approach, it implies unity and cooperation in a way that suggests a systems approach can be taken (Hashim & Majeed, 2014): “O mankind! You were created from a single (pair) of a male and a female and you were made into nations and tribes, that you may know each other (not that you may despise each other)” (Quran, 49:13)<sup>24</sup>. The systems approach is also used by religious scholars in their approach to understanding the Quran, by recognizing it as a single whole with various parts that were developed at different times and places and within different contexts (Maududi, 2005a).

The contingency approach for LBI emphasizes the need for a plan or preparation in the event that existing circumstances change, unexpected events occur, or the main plan fails. Since it is impossible to create a perfect plan, or expect every possible event, the contingency approach encourages having alternate plans as well as being flexible in the implementation of a plan (Jabnoun, 1994). This approach can be seen in the Quran, where various actions are expected of people but alternatives and exceptions are also given. For instance, fasting during Ramadan is required except in certain circumstances:

Ramezan is the month in which was revealed the Holy Quran which is a Guidance for mankind and which bears clear proofs and explanations for the Guidance and which stands as Forgan (i.e., a criterion between Truth and falsehood); so whoever of you who is present at his home, he should fast therein and whosoever on a journey or ill, he should fast the same number of other days; Allah intends for you ease, he does not intend for you hardship. You must complete the

prescribed number of days; and glorify Allah's Greatness for His having guided you and you be thankful to Allah for His Favour. (Quran 2:185)<sup>25</sup>.

As another example, debts should be written down and have witnesses sign the document, but a promissory object can be given if a scribe cannot be found:

O, you who believe! When you contract a debt for a fixed term, then write it down and let scribe write it down between you justly. And the scribe should not refuse to write, as to what Allah has taught him. So let him write and let the debtor dictate; and he must fear Allah, his Creator & Nurture; and diminish not anything or what he owes. If he who owes, suffers from mental problem or he is weak or unable to dictate himself, then let his guardian dictate justly. And call to witness, two witnesses from among your men and if there is not two men, then call a man and two women of those you approve of as witnesses, so that if one of the two women forgets, the second one of the two may remind the other, and the witnesses should not refuse to witness when they are called on (for evidence). You should not become weary of writing it down, whether small transaction or big, with its fixed term; this procedure is the most equitable with Allah, more solid as evidence, and more convenient to prevent doubt among yourselves. In case it is a present transaction of trade in which you give and take between yourselves there is no blame on you if you do not write it down, nevertheless, take witnesses when you make a commercial contract, but do not let either the scribe or the witness be pressed or threatened; and if you do (so) verily, it will be regarded as disobedience (from Allah's Command) from your side; and fear from

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شَهْرُ رَمَضَانَ الَّذِي أُنزِلَ فِيهِ الْقُرْآنُ هُدًى لِّلنَّاسِ وَبَيِّنَاتٍ مِّنَ الْهُدَىٰ وَالْفُرْقَانِ ۚ فَمَنْ شَهِدَ مِنْكُمُ الشَّهْرَ فَلْيَصُمْهُ ۖ وَمَنْ كَانَ مَرِيضًا أَوْ عَلَىٰ سَفَرٍ فَعِدَّةٌ مِّنْ أَيَّامٍ أُخَرَ ۗ يُرِيدُ اللَّهُ بِكُمُ الْيُسْرَ وَلَا يُرِيدُ بِكُمُ الْعُسْرَ وَلِتُكْمِلُوا الْعِدَّةَ وَلِتُكَبِّرُوا اللَّهَ عَلَىٰ مَا هَدَاكُمْ وَلَعَلَّكُمْ تَشْكُرُونَ

the disobedience of Allah's Commands. Allah is the One Who teaches you all; and Allah is the Absolute Knower of Everything" and "And if You are on journey and cannot find a scribe, then take a pledge with possession; but if one of you trusts the other (can do without taking pledge), then the trustee should fulfill his trust and return the entrusted faithfully; and should fear Allah, his Creator & Nurture. And (you people) do not conceals testimony; and whosoever conceals it, then surely his heart is sinful. And Allah is well aware of all that you do. (Quran 2:282-283)<sup>26</sup>.

As a third example, a nation should be prepared for war so that, if they are attacked, they can respond instead of prepare while being sieged (Maududi, 2005b):

And (to fight the enemy) prepare against them to the utmost, such as armed force and strong horses and provisions for fighting, in order to frighten the enemy of Allah as well as own enemy and others besides them, whom you do not know them but Allah knows them; and whatever you spend in Allah's way will be repaid to you and you shall not be dealt with, unjustly. (Quran 8:60)<sup>27</sup>.

However, the Quran is also clear that there are instances where flexibility should not be implemented, particularly in terms of moral issues. For example, certain

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يَا أَيُّهَا الَّذِينَ آمَنُوا إِذَا تَدَايَيْتُمْ بِدِينٍ إِلَىٰ أَجَلٍ مُّسَمًّى فَاكْتُبُوهُ ۚ وَلْيَكْتُب بَيْنَكُمْ كَاتِبٌ بِالْعَدْلِ ۚ وَلَا يَأْب كَاتِبٌ أَنْ يَكْتُبَ كَمَا عَلَّمَهُ اللَّهُ فَلْيَكْتُبْ وَلْيُمْلَأِ الَّذِي عَلَيْهِ الْحَقُّ وَلْيَتَّقِ اللَّهَ رَبَّهُ وَلَا يَبْخَسْ مِنْهُ شَيْئًا ۚ فَإِنْ كَانَ الَّذِي عَلَيْهِ الْحَقُّ سَفِيهًا أَوْ ضَعِيفًا أَوْ لَا يَسْتَطِيعُ أَنْ يُمْلَأَ هُوَ فَلْيُمْلَأْ وَلْيُهُ بِالْعَدْلِ ۚ وَأَنْتُمْ شَاهِدُونَ ۚ مَنْ تَرَ جُلَيْنَ فَرَجَلٍ وَأَمْرًا تَانٍ مِمَّنْ تَرْضَوْنَ مِنَ الشُّهَدَاءِ أَنْ تَضِلَّ إِحْدَاهُمَا فَتُذَكِّرَ إِحْدَاهُمَا الْأُخْرَىٰ ۚ وَلَا يَأْبُ الشُّهَدَاءُ إِذَا مَا دُعُوا ۚ وَلَا تَسْمَعُوا أَنْ تَكْفُوبَهُ صَغِيرًا أَوْ كَبِيرًا إِلَىٰ أَجَلٍ ۚ ذَلِكُمْ أَقْسَطُ عِنْدَ اللَّهِ وَأَقْوَمُ لِلشُّهَدَةِ وَأَدْنَىٰ أَلَّا تَرْتَابُوا ۚ إِلَّا أَنْ تَكُونَ بَعْضُكُمْ عَلَىٰ بَعْضٍ كَافِرًا كَافِرًا ۚ وَلَا تَكْفُوبُهَا ۚ وَأَشْهَدُوا إِذَا تَبَايَعْتُمْ ۚ وَلَا يُضَارَّ كَاتِبٌ وَلَا شَهِيدٌ ۚ وَإِنْ تَفَلَّحُوا فَإِنَّهُ فُسُوقٌ بِكُمْ ۚ وَاتَّقُوا اللَّهَ ۚ وَيَعْلَمُكُمْ اللَّهُ ۚ وَاللَّهُ بِكُلِّ شَيْءٍ عَلِيمٌ ۚ وَإِنْ كُنْتُمْ عَلَىٰ سَفَرٍ وَلَمْ تَجِدُوا كَاتِبًا فَرِهٌ مَّقْبُوضَةٌ ۚ فَإِنْ أَمِنَ بَعْضُكُمْ بَعْضًا فَلْيُؤَدِّ الَّذِي أُؤْتِمِنَ أَمْنَتَهُ وَلْيَتَّقِ اللَّهَ رَبَّهُ ۚ وَلَا تَكْفُومُوا الشُّهَدَةَ ۚ وَمَنْ يَكْتُمْهَا فإِنَّهُ فَإِنَّهُ عَانِمٌ قَالَهُ ۚ وَاللَّهُ بِمَا تَعْمَلُونَ عَلِيمٌ

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وَأَعِدُوا لَهُمْ مَا اسْتَطَعْتُمْ مِنْ قُوَّةٍ وَمِنْ رِبَاطِ الْخَيْلِ تُرْهَبُونَ بِهِ عَدُوَّ اللَّهِ وَعَدُوَّكُمْ وَآخَرِينَ مِنْ دُونِهِمْ لَا تَعْلَمُونَهُمُ اللَّهُ يَعْلَمُهُمْ ۚ وَمَا تُنْفِقُوا مِنْ شَيْءٍ فِي سَبِيلِ اللَّهِ يُوَفَّ إِلَيْكُمْ وَأَنْتُمْ لَا تُظْلَمُونَ



behaviours are completely forbidden and some penalties are fixed regardless of the circumstance: “Cut off the (right) hand (four fingers) of the thief, male or female, a punishment as an exemplary Torment from Allah for that which they committed; and Allah is the Mighty Decreeer” (Quran 5:38)<sup>28</sup>. Likewise, Muslims often take an inflexible approach to Islam itself: the concept that Islam is the final religion, that the text of the Quran cannot change, and thus the divine law will not change or adapt for future circumstances<sup>29</sup>.

The consistency approach for LBI encourages teamwork, a common goal to aim for, and perseverance towards accomplishing this goal (Abbasi et al, 2010). In addition, there is importance attached to long-term goals, creating appropriate plans, and planning for the future (Jabnoun, 1994). This is derived from the many statements in the Quran that encourage patience and perseverance, particularly in the face of difficulties or danger. For instance: “Saying: Salam (Peace & health) on you who persevered patience (in Allah’s path), now, you have attained this excellent final Home!” (Quran, 13:24)<sup>30</sup>.

Another example is:

Say (O, Messenger!): O, My worshippers who believe! Fear from the disobedience of your Creator and Nurturer! Good is the reward of those who do good in this world. And Allah’s Earth is vast enough (So if you are bothered by the disbelievers of this land, then Migrate to another place) since those who are

<sup>29</sup> Such an inflexible approach to religion is not restricted to Islam though; this behaviour is common to many followers of most religions throughout history.

patient and steadfast shall receive their rewards completely and abundantly.

(Quran, 39:10)<sup>31</sup>;

A third example is:

But the believers who had been bestowed Faith and knowledge said: Woe on you for these mean thoughts! The reward of Allah is better for those who have Faith and do good deeds; but this reward is only bestowed on those who are patient and steadfast in the path of their Faith. (Quran, 28:80)<sup>32</sup>;

And a fourth example is: “O, you who believe! Preserve your patience and be garrisoned; and strengthen your mutual relations (against the army of the enemy of Islam) and (above all) fear from the disobedience of Allah’s Commands, so that you receive salvation” (Quran, 3:200)<sup>33</sup>. Having patience and perseverance is necessary for being consistently effective and/or productive, and for accomplishing long-term projects.

### Leadership in Schools

Up until this point, discussions of leadership have focused on the very general case of ‘leadership in any organization.’ Although the previously discussed leadership theories can be applied to the context of schools, there are additional details that some researchers have explored in specifically the context of schools. Therefore, this section will briefly touch on some theories explicitly about leadership in the school or classroom. This section serves two purposes. First, it will present some literature (Hallinger’s model in particular) on leadership in schools. Second, it provides an example of how any of the

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قُلْ يَا عِبَادِ الَّذِينَ آمَنُوا اتَّقُوا رَبَّكُمْ ۗ لِلَّذِينَ أَحْسَنُوا فِي هَذِهِ الدُّنْيَا حَسَنَةٌ ۗ وَأَرْضُ اللَّهِ وَاسِعَةٌ ۗ إِنَّمَا يُوَفَّى الصَّابِرُونَ أَجْرَهُمْ بِغَيْرِ حِسَابٍ

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وَقَالَ الَّذِينَ أُوتُوا الْعِلْمَ وَيَلْتَمِئُونَ إِلَيْكُمْ تُؤَلَّفُونَ لَهَا وَالصَّابِرُونَ

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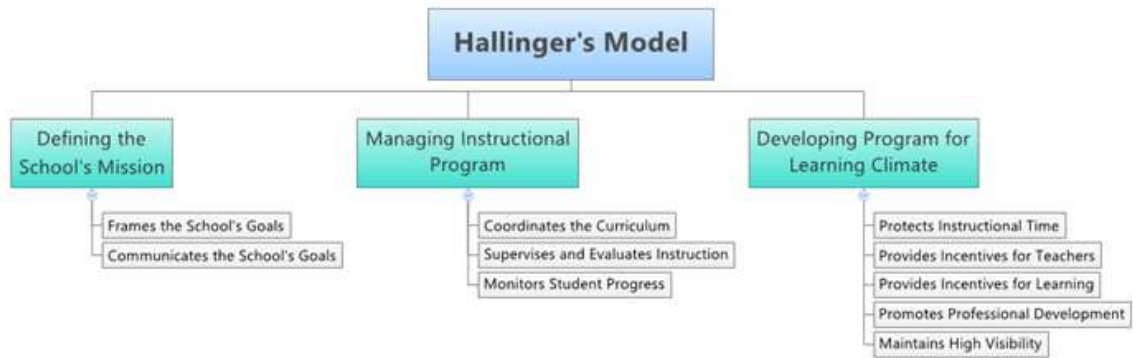
يَا أَيُّهَا الَّذِينَ آمَنُوا اصْبِرُوا وَصَابِرُوا وَرَابِطُوا وَاتَّقُوا اللَّهَ لَعَلَّكُمْ تُفْلِحُونَ

previously discussed leadership theories could be applied to schools. For example, Hallinger's model identifies who could be considered a leader and what 'tasks' or 'goals' such leaders would need to think about. Thus, considering Hallinger's model provides insight into how other theories, such as transformational leadership or Goleman's situational leadership, could be applied to the context of schools.

Ramsankar (2014) argued that leadership in schools is not something that can be defined but rather it is like an art in that you can define common practices associated with great examples. Kouzes and Posner (2002) provided five practices that they thought were best among educational leaders: they model the method they expect others to follow, inspire a vision for the whole system, challenge existing processes so as to enable improvement, enable others to act, and encourage emotional and social attachment to their work. Often, administrators and principals are responsible for leadership in schools, creating change in educational policy and local processes by working with teachers, students, and other stakeholders in the community (Powell & Jurling, 2016). However, the term "educational leader" is usually applied to those who advance, improve, and organize the processes and structures of an educational institution regardless of the level (e.g., elementary, secondary, post-secondary, etc.) (Powell & Jurling, 2016). This can involve managing teachers and staff, building and strengthening teams, determining who to hire, creating and revising curriculum content and standards, and implementing or setting various policies. Hence, the leader could be operating within a school (such as by being the principal) or at higher levels in the educational system (e.g., school superintendent, member of a school board, working within educational ministry of a

government, etc.). Although such distinction is important, the research explored in this dissertation will only look at leaders operating within a school.

One model of leadership in schools that has seen significant empirical examination is Hallinger's Model of Instructional Leadership (see Hallinger, 2000; Hallinger & Murphy, 1985; Heck, Larson, & Marcoulides, 1990). Within this model there are ten practices, roughly grouped into three categories (see Figure 2.10 below). Of these practices, mission-building activities are the ones that are most influential for a principal to perform in terms of affecting student outcomes (Hallinger, 2003). In addition to the many studies summarized by Hallinger (2003) in his model, other large meta-analyses have been conducted to explore common patterns in the behaviours and traits of leaders in an education context. One large meta-analysis was conducted by Waters, Marzano, and McNulty (2003; 2005), in which roughly 70 empirical studies over a period of 30 years were examined, analyzed, and summarized. In this analysis, they identified 21 "responsibilities" that were related to student achievement; in other words, as a leader exercised these responsibilities to a higher degree there was a corresponding increase in student achievement (Waters, et al., 2003; Marzano, Waters, & McNulty, 2005). Leaders did not need to show all of these responsibilities, but having more of them was related to higher student achievement. Some of the responsibilities identified in this meta-analysis overlapped with the practices identified by Hallinger, but they were not identical.



*Figure 2.10.* A diagram of the ten practices of Hallinger’s model, and their organization into three categories of practices (adapted from Leithwood, Day, Sammons, Harris, & Hopkins, 2006, pp. 22-23).

A more elaborate theory of leadership in schools was proposed by Leithwood and colleagues (2006), in which they combined several existing practices and models. They took 17 of the responsibilities identified by Waters and colleagues (2003; 2005) and categorized them as behavioural practices, while the remaining four responsibilities were categorized as qualities of a leader (Leithwood et al., 2006). These were then combined with the practices suggested by Hallinger’s model, such that a new set of “core practices” were developed. An adaptation of their comparison is presented below in Table 2.4. However, they discuss two practices that are considered important in the literature but are excluded from their theory: communication and problem solving. Leithwood and colleagues considered these two things as among pre-requisites for being a leader, and assume that leaders need to be good at them (see Leithwood et al., 2006, pp. 21-31).

Table 2.4.

*Description of Leithwood and colleagues' educational leadership theory (adapted from Leithwood et al., 2006, pp. 30-31)*

Leithwood et al.'s Core Practices	Hallinger's Principles	Waters et al.'s Responsibilities
Setting Direction		
Vision	Developing a clear mission focused on students' academic progress	Inspires and leads new and challenging innovations
Goals	Framing the school's goals; communicating these goals	Establishes clear goals; keeps goals at forefront of attention
High performance expectation		
Developing People		
Individualized support and consideration; emotional understanding and support	Providing incentives for Teachers	Recognizes and rewards individual accomplishment; demonstrates awareness of personal aspects of staff
Intellectual stimulation	Promoting professional development	Is willing to, and actively challenges, the status quo; ensures staff are well informed about best practices and fosters regular discussion about them
Modelling	Maintaining high visibility	Has quality contacts and interactions with staff and students
Redesigning the Organization		
Building a collaborative culture		Fosters shared beliefs, sense of community, cooperation; recognizes and celebrates school accomplishments and acknowledges failures; involves staff in design and implementation of important decisions and policies
Structuring the organization to facilitate work	Providing incentives for Learning	
Creating productive relationships with families and communities		Is an advocate and spokesperson for school to all stakeholders
Connecting the school to its wider environment		
Managing the Teaching Program		
Staffing		

Providing teaching support	Supervising and evaluating instruction; coordinating the curriculum	Establishes set of standard operating procedures and routines; provides materials necessary for job; directly involved in design and implementation of curriculum, instruction and assessment practices
Monitoring	Monitoring student progress	Monitors the effectiveness of school practices and their impact on student learning
Buffering staff from distractions to their core work	Protecting teaching time	Protects teachers from issues and influences that would detract them from their teaching time or focus

*Approaches to studying leadership in schools.* When conducting studies or investigating the nature of leadership in schools, different approaches could be taken. Gunter (2001) categorized the positions of various authors into four main positions taken while studying leadership: critical, humanistic, instrumental, and scientific (see Table 2.5). Each position focuses on a different aspect of leadership and a particular means of gathering information about leadership.

Table 2.5.

*Four major positions in studying leadership (adapted from Gunter, 2001)*

Position	Description	Examples
Critical	Focuses on social injustice and oppression of established power structures	Ball (1994) Blackmore (1999) Grace (1995) Smyth (1989)
Humanistic	Focuses on experiences, advice, memoirs, and biographies of leaders	Day, Harris, Hadfield, Tolley, & Beresford, (2000) Gronn (1999) Ribbins (1997) Southworth (1995)
Instrumental	Focuses on effective leadership strategies for delivering organizational outcomes	Caldwell & Spinks (1988; 1992; 1998)
Scientific	Focuses on measuring the impact of leadership effectiveness on organizational outcomes	Leithwood, Tomlinson, & Genge, (1996) Leithwood, Jantzi, & Steinbach, (1999) Sammons, Thomas, & Mortimore, (1997)

Gunter (2001) describes the critical position as describing and analysing the relationship between the agency of a leader/follower and the social, leadership, or organizational structures that enhance or limit this agency. This is often conducted within the context of the social sciences, and focuses particularly on the powers and power structures involved in leadership. The purpose of this approach is to see the wider network of people, and gain a sense of alternate ways of accepting, interpreting, and refusing various methods of leadership. The humanistic position uses a narrative, biographical approach to leadership (Gunter, 2001) in which leaders share their experiences of exercising leadership. This position can provide a rich sense of the realities of leadership, tension, problems, and solutions within particular contexts (Day, Harris, Hadfield, Tolley, & Beresford, 2000). In contrast, the instrumental position merely collects and gives models of effective leadership strategies, often in great detail, with the intention of replicating them elsewhere (Gunter, 2001). Although the instrumental position has resulted in bullet-point style lists of leadership, the scientific position attempts to back up those theories of leadership with empirical evidence of effectiveness (i.e., effects of leadership styles on behaviour, function, emotion, and particularly student outcomes) (Gunter, 2001). The instrumental position, and scientific one to an extent, have been used in policy making and in preferred methods of instructional leadership (e.g., see Caldwell & Spinks, 1998). However, emphasizing the instrumental position over the others has led to a situation where producing and analyzing knowledge about leadership in education is moving away from professional researchers towards commercial consultancies (Forde, Hobby, & Lees, 2000).



## Structure and Types of Organizations

Any organization can have various forms of structure to determine its policies and means of communication, as well as the roles, responsibilities, and authority of its members. Thus, the structure of an organization determines the extent to which, and nature by which, leadership affects the members of an organization (Donaldson, 1996). Similarly, the type of an organization can also influence the style of leadership that is used or is most appropriate. When it comes to organizations in the education system, Parkyn (1969) argued that it is important for administrators and classroom teachers to have a good understanding of the organization's structure. Understanding how the structure of a school, school board, and the whole education system influences the goals, processes and methods of education can help teachers to determine how to become a more effective teacher or what change is needed to the system to improve the quality of education. Thus, in this section, I will discuss some different structures, types of organizations, and strategies in relation to educational leadership (see Figure 2.11).



*Figure 2.11.* This figure shows the major topics about structures, types, and strategies of educational organizations.

***Organizational strategy.*** Although organizations can differ in terms of their structure, they can also be described in terms of the strategy that leaders within an

organization follow. Smith, Guthrie, and Chens (1989) summarize four high-level strategies: defender, prospector, analyzer, and reactor. In the defender strategy, organizations focus primarily on improving efficiency so as to protect their existing areas of operation. This strategy works best in a stable environment. In the prospector strategy, organizations focus on innovation, creativity, and flexibility so as to find new areas of operation or growth. In the analyzer strategy, organizations attempt to combine both defender and prospector; in other words, they attempt to improve efficiency in their currently stable areas of operation while also seeking new areas of operation. This strategy is very difficult to implement well, since both efficiency and creativity need to be emphasized. In the reactor strategy, organizations do not have any consistent plan but instead react to the current operating environment. As such, the reactor strategy often results in organizations responding incorrectly or too slowly (e.g., trying to innovate in a new market after a competitor has already captured it) and is often the strategy employed by organizations that soon fail (Smith et al., 1989).

***Vertical vs. horizontal structure.*** An organizational structure can be more vertical (hierarchical) or more horizontal (flat) in nature. These differ in terms of the relationship between members with different roles, such as the relationship between students, teachers, principals, administrators, and other staff members.

In a vertical structure, there is a hierarchy or pyramid of levels of roles such that everyone has a supervisor except the person (or group) at the top (Cruz-Cunha, 2010). The number of levels, and relative sizes of each level, can determine the overall shape of this structure. For instance, usually a pyramid shape is suggested whereby there is one person on top, followed by several layers that increase in size until the bottom layer is

reached, which is the largest. However, there could be many levels to this structure, making it exceptionally “tall.” The main advantage of the vertical structure is that all members have clearly defined authority and responsibilities, as this is embedded in their level in the structure (Nowozin, 2013). There is also the easy opportunity to motivate employees through the possibility of promotion to a higher level in the structure. In addition, it is easier for employees to become specialists, as they can narrow their emphasis to a particular function. However, employees may become loyal to a particular department, which can lead to rivalries and inter-departmental conflicts (Cruz-Cunha, 2010). The main disadvantages are that increased layers in the organization can lead to increased cost (e.g., salaries for middle-management), strong resistance to change, and poor communication between layers (Nowozin, 2013).

In a horizontal structure, the hierarchy of a vertical organization is flattened to as few levels as possible. Often this has only one or two levels, with most of the staff being on the same level (Cruz-Cunha, 2010). Given that there are fewer levels, the decision-making process and supervision is often incorporated into the same level (i.e., people often have no direct supervisor). One advantage of this structure is that greater coordination and communication can occur, due to fewer intervening levels of people (Nowozin, 2013). In addition, decision making between people is easier since they are the only ones that need to be involved. As well, eliminating middle management can reduce costs. One disadvantage is that confusion and power struggles can occur among people because they lack a direct supervisor or person to protect against domineering personalities (Cruz-Cunha, 2010). All members of the organization have a greater degree of responsibility, and this can also lead to burnout. Furthermore, since people tend to lack

a specific function, horizontal structures tend to produce many generalists but few specialists. Although it is easier to change a horizontal structure, long-term growth can be difficult, as adding further layers of management cannot be done without breaking the structure.

***Formal vs. informal organization.*** The degree of formality an organization can have refers to how well defined it is. In other words, it refers to how well the rules, positions, goals, responsibilities, and membership criteria are defined.

Formal organizations are highly goal-oriented, and tend to have clearly defined positions, jobs, functions, responsibilities, and rules (Chitale, Mohanty, & Dubey, 2012). A formal organization is one where the activities are coordinated towards a common objective (Koontz, O'Donnell, & Weihrich, 1986). All of these details are codified and recorded, such that misunderstandings can be cleared up and disobedience more easily identified. Membership in a formal organization is also restricted, such that one or more designated people decide whether others can be part of the organization. Etzioni, in exploring the reasons why people enter an organization, described a formal organization as a “group that restricts membership and makes use of officially designated positions and roles, formal rules and regulations, and a bureaucratic structure” (cited in Subedi, 2014, p. 3). Alternative definitions of a formal organization are also available. For instance, from an economic perspective a formal organization could be described as a fixed regulation of in-plant operational sequence and structures; it is created in the form of rules and permits very little in the way of difference of interpretation (Hutchison, 2010). Blau & Scott (1962) describe a formal organization as the structure prescribed by management, generally represented in an organizational chart. The chart is supported by

more detailed descriptions of each role and relationship shown in it. From the social dynamics perspective, a formal organization is “a system of consciously coordinated activities or forces of two or more people” (Foss, 2000, p. 16).

In contrast to a formal organization, an informal organization is dynamically created, and evolves organically and spontaneously from changes in the work environment (Koontz et al., 1986). This type of organization is basically a dynamic set of personal relationships, whether it is a social network, community of common interest, or a spontaneous group formed from an emotional response. Informal organizations can be separate entities, or they can occur within a formal organization. Informal organizations can serve four major functions within a formal organization: perpetuate the cultural and social values of the group, provide social status and satisfaction that may not be given by the formal organization, provide communication channels, and influence and regulate the behaviours of people within the group (see Anbuvelan, 2007).

***Public vs. private sector organization.*** Regardless of the structure of an organization, there is also a difference in terms of how it functions and who provides the financial means by which it can operate. Typically, this difference is divided into two groups: public and private.

Public sector organizations are those that are supported by the government or state (Sims, 2007). Such an organization provides a service to all people regardless of their ability to pay. For instance, a public school provides a service (education) to any family regardless of their income. In some cases the fee is completely waived (i.e., parents pay nothing) while in other cases a small nominal fee, or subsidized fee, is required (Sims, 2007). A public sector organization is also largely controlled by the government or state

(Sims, 2007). For instance, the government defines the structure and content (i.e., curriculum) of a public school.

In contrast, a private sector organization is not directly controlled, operated, or funded by the government or state (Mazzucato, 2013). Thus, the private sector basically includes anything that is not part of the public sector; generally speaking, these are only for-profit companies (Mazzucato, 2013; Sims, 2007). Any service that a private sector organization provides must be paid for, and are, thus, unavailable for people unable to afford the price. For instance, for someone to lease a car he or she must be able to pay the upfront and continual cost of the lease; without the money to pay, the car cannot be leased. Similarly, a family who wants to send a child to a private school must be able to pay the tuition cost of attending the school. The advantage is that the government does not control the private school; although it must abide by certain government regulations and laws, the content and structure of the school is less rigorously controlled than in public schools.

In some cases public and private sector organizations work together for a common purpose. Most often this occurs when a public sector organization outsources some contract to a private sector organization (Mazzucato, 2013). For example, a government organization can hire a for-profit company to build a road or bridge.

### **Learning Organizations**

A learning organization is an organization in which all members, especially the leaders, encourage, promote, and enable the personal growth of all its members (Senge, 1990). In other words, those with influence and power within an organization actively try to adapt the structure and processes of the organization to new circumstances through

helping all members of the organization learn to improve themselves (Pearn et al., 1995).

Any organization can be a learning organization to some degree. Organizations can typically be evaluated in terms of their environment, structure, or the behaviour and attitudes of their employees, but these criteria do not work well at describing the degree to which something is a learning organization (Olson-Buchanan, Bryan, & Thompson, 2013). Thus, just as leadership for a learning organization may need to be assessed differently, learning organizations themselves may need to be assessed differently. One common method is to evaluate an organization using the six factors of the INVEST model: Inspired learners, Nurturing culture, Vision for the future, Enhanced learning, Supportive management, and Transforming structures (Pearn et al., 1995). Each of these six factors is discussed in more detail below:

*Inspired learners.* This is the degree to which members of an organization have motivation and confidence for continual learning (Pearn et al., 1995). When people have high motivation and confidence for learning, it means they are regularly looking for new opportunities to learn something.

*Nurturing culture.* This is the degree to which the values and behaviours of the organization support continual learning (Pearn et al., 1995). Some attitudes of developing such a culture include doubting the status quo, critiquing assumptions, and questioning current methods. Certain activities can also develop this culture: tests and experience, learning from mistakes, and research and rational debates (Rabin, 2003).

*Vision for the future.* This is the degree to which the organization has a shared vision, including recognizing, reacting to, and determining what is feasible for the future (Pearn et al., 1995). A shared vision can also confirm learning within individuals of an

organization, hence it is necessary to ensure that the whole organization is continually transformed, improved, and adapted to the changing external circumstances (Gilley, Maycunich & Gilley, 2000).

*Enhanced learning.* This is the degree to which an organization uses processes and tools specifically for learning (Pearn et al., 1995). Foremost among these processes is encouraging an attitude of lifelong learning in members (Gilley et al., 2000).

*Supportive management.* This is the degree to which managers sincerely believe that continuity of learning will improve the performance of their organization (Pearn et al., 1995). Since it is often the managers who would support the learning processes, and monitor the degree of learning, it is necessary for the managers to understand the reasons behind promoting learning and to be onboard with the whole enterprise (Jankiram & Rao, 2010).

*Transforming structures.* This refers to existence of structures within an organization that enable, facilitate, and support the learning that occurs between its levels, units, and subdivisions (Pearn et al., 1995). These are not structures for learning, but they enable learning or rapid change. As such, greater development or usage of these structures helps create more innovation and personal growth within members of the organization (Chawla & Renesch, 2006).

In addition to these six factors, learning organizations also benefit from effective implementation of five principles: shared vision, mental models, personal mastery, team learning, and system thinking (Senge, 1990).

*Shared Vision.* The purpose of a shared vision is to create a common understanding and commitment amongst all people in the organization or group. This



involves not simply giving a vision or goal, but building mutual understanding about the direction of the group.

*Mental Models.* Mental models refer to the deep-seated beliefs, values, mind-sets, and assumptions that determine how people think and behave. Enabling others in the group to become aware of their mental models, share them with others, and clarify and challenge their models and those of others is critical for building mutual understanding.

*Personal Mastery.* Personal mastery refers to how much a person knows about him- or herself (i.e., self-awareness). Through increasing this personal understanding, the quality of interactions and relationships among people in a group can be improved.

*Team Learning.* The purpose of team learning is the ability of individuals in a group to think together as a single unit; sharing experience, insight, knowledge, and skills with each other such that their interactions and the results of their work improves in quality.

*Systems Thinking.* Systems thinking refers to a means of examining complex situations and contexts in a different way. Rather than view things in terms of the objects and the causal connections between them, systems thinking emphasises analyzing the relationships between all components and understanding how these relationships result in output or changes in the system. This facilitates identifying subtleties, influences, and unintended consequences of various actions, plans, or policies undertaken by an organization.

***Leadership for Learning Organizations.*** Since enabling growth and adapting to change are necessary for learning organizations, these organizations require a different kind of leadership (Senge, 1990). In particular, a leader needs to develop three different

kinds of characteristics: designer, having the ability to design the systems and processes that enable the organization to create and promote growth (Senge, 2002); steward, having the attitude of being a servant of others rather than seeing oneself as inherently superior (Covey, 1990); and teacher, having the ability to mentor, educate, and guide others in their development (Senge, 2002). The traditional approaches to leadership focus on the structure of an organization, the individual instead of the system, and on reaching immediate goals. None of these are that effective when it comes to a learning organization (Senge, 1996); hence, these three characteristics are necessary for leaders of a learning organization as they act to counter the traditional approach. Furthermore, leaders need to develop the thinking and attitudes of the five disciplines identified above (Senge, 1990; 2002). These five disciplines are meant to create a more practical direction to the characteristics previously mentioned, so that leaders can act and think appropriately.

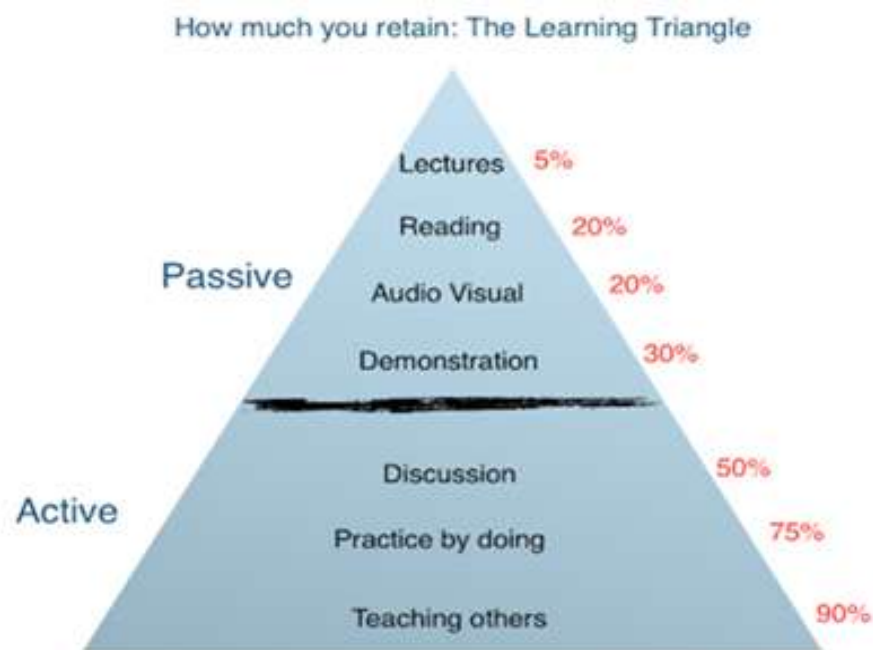
### **Active Strategies for Learning**

In a learning organization, different strategies could be taken to engage in learning. When considering this topic in light of education, specifically when thinking about a school as a learning organization, the strategies for learning that are used need to advance both the goal of teaching (i.e., curricula goals) and personal growth (i.e., the learning that occurs as part of a learning organization). One strategy that would be worthwhile to examine then is active learning.

### **Active vs Passive Learning**

Active learning uses various activities to engage students in higher-order thinking tasks (e.g., analysis, evaluation, etc.), with the goal of having students achieve more than

what is possible through passive learning (Fobes & Kaufman, 2008). Figure 2.12 below compares the amount learned when using either passive or active learning techniques. For example, a typical passive learning classroom could involve a lecture where students write down what they hear and then have to repeat it back at some point later. In contrast, an active learning classroom could involve a lecture but then students need to discuss with each other the topics given in the lecture, and use that discussion to give a presentation to their classmates. As can be seen from this simple example, active learning techniques achieve higher learning outcomes but require more effort from both the teachers and students.



*Figure 2.12.* Diagram showing amount learned through different learning techniques (from Fobes & Kaufman, 2008).

When using active learning in a classroom, the teacher needs to be aware of the students' goals, interests, capabilities, and current activities and determine the appropriate questions to ask, as well as techniques to use, for the next topic. This is analogous to

certain leadership models (e.g., Goleman's situational leadership) whereby the leader needs to look at the circumstance and problem and determine the best leadership style or method to use so that the current problem can be solved. For active learning, a teacher can use effective questions, discussions, and thinking to determine the next steps to take (Fusco, 2012). In doing so, the teacher attempts to answer various questions themselves such as: What should the questions that I plan to ask require from the students? What responses do I want to get? What should be the focus of the discussion that results from these questions? How can the resulting discussion be limited to that focus? How can thought and attention be directed to the appropriate topic? In other words, teachers should be thinking about how to increase the depth and richness of thought of their students, since this helps them to become better learners (Fusco, 2012). Some ways of increasing the depth and richness of thought can include: students and teachers asking better questions, having a diversity of viewpoints available (e.g., diversity of background, culture, and/or opinions of students), and promoting a variety of opinions and positions on a topic (Kustra & Potter, 2008). Open-ended questions tend to be more supportive of active learning, since they can promote a variety of responses (Huinker & Freckmann, 2004). However, the teacher also needs to create an environment where a creative and open style of thinking and questioning is even possible, since active learning tends to be hindered otherwise (Senge, 1990).

An effective implementation of active learning may benefit from appropriately using certain related theories: Bloom's Taxonomy, Critical Pedagogy, Metacognition, Problem-based Learning, and Collaborative Learning. Each theory is explained in detail below.

**Bloom's Taxonomy**

Bloom's Taxonomy (Bloom, Englehart, Furst, Hill, & Krathwohl, 1956; Gronlund, 1991) is a commonly used method for organizing levels of expertise with respect to different measurable student outcomes. The taxonomy was later revised, with changes to some of the terminology to assist better understanding of the taxonomy itself as well as the recognition that the taxonomy could be used for multiple domains: cognitive or knowledge-based goals, psychomotor or skill-based goals, and affective-based goals (Krathwohl, 2002). Since the ideas in Bloom's taxonomy can be applied to each of these domains, different taxonomies can be created where the level of expertise is tied to different expressions within a specific domain (UNC, 2017). The taxonomies for knowledge-, skill-, and affective-based goals are shown below in Tables 2.6, 2.7, and 2.8 (respectively). For each taxonomy the level of expertise is listed in order of increasing complexity. Higher levels of expertise require more sophisticated means of measuring the outcome (UNC, 2017). Similarly, the higher levels of expertise tend to be associated with an active learning approach, in that teachers can use the taxonomy to determine the kind of questions to ask that would create a more active-learning environment.

Bloom's Taxonomy is useful in the context of active learning because of how it allows instructors to identify the level of expertise and the activities appropriate for reaching the desired level. Although an active learning approach requires engaging students with techniques other than lecture-style presentations, these 'active' techniques do not automatically mean higher levels of expertise will be achieved. For example, students could engage in a group study of some material and then need to give a presentation as a group to their peers on the results of their study. However, their group

study could only require a comprehension-level of knowledge-expertise; it depends on what questions the students needed to explore as a group. Thus, knowing Bloom's

Taxonomy can help someone use active learning to achieve a deeper level of learning.

Table 2.6.

*Bloom's taxonomy of educational objectives for knowledge-based goals (from UNC, 2017)*

Level of Expertise	Description of Level	Example of Measurable Student Outcome
Knowledge	Recall or recognize terms, ideas, procedure, theories, etc.	What is a learning organization?
Comprehension	Translate, interpret, or extrapolate ideas, but not see larger implications or transfer to other situations	How does a learning organization differ from other organizations?
Application	Apply abstractions, general principles, or methods to specific concrete situations	What is one thing that would need to change for an organization to become a learning organization?
Analysis	Separate a complex idea into its parts and develop an understanding of the organization and relationship between those parts	For a learning organization to function, what is the relationship like between leaders and subordinates?
Synthesis	Use multiple sources to integrate complex ideas into a new and meaningful concept, subject to the given constraints	If a school was to become a learning organization, is there anything special or different that needs to be done? If so, what?
Evaluation	Make a judgment of ideas or methods using external evidence or self-selected criteria, substantiated by observations or informed rationalizations	To determine if your school is a learning organization what are some things you would need to measure?

Table 2.7.

*Bloom's taxonomy of educational objectives for skills-based goals (from UNC, 2017)*

Level of Expertise	Description of Level	Example of Measurable Student Outcome
Perception	Use sensory cues to guide actions	Using only observation, how can you tell if a bicycle is safe to ride?
Set	Demonstrate a readiness to take action to perform some task	Describe the steps you would take to start riding a bicycle along a flat path.
Guided Response	Show knowledge of the steps required to complete the task	Describe how your actions will move you and the bicycle along the path.
Mechanism	Perform the task in a somewhat confident, proficient, and habitual manner	Ride the bicycle three times around a flat track.
Complex Overt Response	Perform the task in a confident, proficient, and habitual manner	Ride the bicycle three times around a bumpy and uneven track.
Adaptation	Perform the task as above, but can also modify actions to account for new or problematic situations	Ride the bicycle from the school to a store, pick up a dozen eggs, and bring them back to the school.
Organization	Create new tasks that incorporate previously learned ones	Describe what changes you need to make to your daily routine to bike to and from school every day.

Table 2.8.

*Bloom's taxonomy of educational objectives for affective goals (from UNC, 2017)*

Level of Expertise	Description of Level	Example of Measurable Student Outcome
Reception	Demonstrate a willingness to participate in the activity	When I'm in class I am attentive to the instructor, take notes, etc. I do not browse the Internet on my phone instead.
Response	Show interest in the objectives, phenomena, or activity by seeking it out or pursuing it for pleasure	I participate in class discussions and ask questions when I think of something I do not understand.
Value	Internalize an appreciation for the objectives, phenomena, or activity	I look for more information on the Internet about the topics discussed in class.
Organization	Begin to compare different values, and resolve conflicts between them to form an internally consistent value system	Some of the topics discussed conflict with how I previously thought those ideas worked. What I can do to resolve this conflict?
Characterization by a Value or Value Complex	Adopt a long-term value system that is "pervasive, consistent, and predictable"	I have put into practice some of the ideas learned in my class.

### **Critical Pedagogy**

The next topic to consider for an active learning approach is critical pedagogy (CP). CP is an approach to language learning and teaching that focuses on transforming power relationships that are oppressive and/or lead to the oppression of a group of people (Kincheloe, 2005). The goal is to humanize and empower learners, as Ira Shor describes it:

Habits of thought, reading, writing, and speaking which go beneath surface meaning, first impressions, dominant myths, official pronouncements, traditional clichés, received wisdom, and mere opinions, to understand the deep meaning, root causes, social context, ideology, and personal consequences of any action, event, object, process, organization, experience, text, subject matter, policy, mass media, or discourse (Shor, 1992, p. 129).

One of the primary purposes of CP then is to consider, examine, critique, and challenge how schools affect the political and cultural life of students, such as by analyzing and discussing the power that schools have over the thinking abilities and attitudes of students (Darder, Torres, & Baltodano, 2002). Thus, teachers who use CP need to recognize that they can empower and transform students, and also become positive agents of change instead of continuing the same unequal power struggles that they are trying to teach their students to overcome (McLaren, 1989). Thus, the main goal of CP is to raise awareness of and work to prevent or fight against the discrimination, domination, or oppression of a group of people (Gor, 2005).

The Brazilian educator and activist Paulo Freire described the role of education as being completely connected to humanizing students so they become social agents of



positive change in the world (Freire, 1996). Since CP is most strongly associated with Freire, this view of education is important for understanding the theoretical foundation of CP. Freire viewed education as being intimately connected to political and power struggles, which is different from the traditional perspectives of education that are typically considered neutral in power struggles and disconnected from politics (Darder, Torres, & Baltodano, 2002). However, many education researchers and practitioners who have noticed inequalities and oppressive power relations within the education systems have responded to such a situation by using, discussing, or promoting CP (Kessing-Styles, 2003). Another push for CP came as a reaction to the detachment of classrooms from their historical and social circumstances. Before CP, some researchers (such as Hall, 1995) tried to promote focusing on the larger socio-historical and political forces within the school, but this led to the approach of CP, which explicitly discusses and focuses on those forces (Okazaki, 2005). Since CP must be direct in addressing the potential political, social, and cultural influences of a school, the CP approach emphasizes describing, legitimizing, and challenging the cultural experiences of the historical and current social reality of the students in a way that students learn to criticize and adjust their own social reality (Darder, Torres, & Baltodano, 2002).

The main techniques used in CP include presenting problems and questioning issues in students' lives, so that students learn to think critically about their own life conditions, their attitudes and ideas, and can develop a sense of the steps needed to improve their surrounding society (Gor, 2005). Often this means borrowing techniques and ideas from media literacy, so that students can become aware of, sensitive to, and capable of identifying representations of race, ethnicity, gender, sexuality, class, and

other cultural differences within different forms of media (Kellner, 2000). Such an approach helps students become better at identifying when people are trying to use media (e.g., video, text, photos) to oppress, marginalize, or exert power over other groups; thus, students can learn to avoid or fight against such oppression. In other words, CP helps students see how audience, voice, power, and evaluation actively create particular relationships -- between teachers and students, classrooms and communities, institutions and society -- so that the relationships between knowledge, authority, and power become more noticeable (Giroux, 1997). By analyzing media then, CP gives students the tools to become empowered and able to resist manipulation and domination (Kellner, 2000).

Although CP is different than active learning, in many ways CP requires an active learning approach. In a passive learning approach, students learn content through listening to an instructor but are not required to debate, discuss, and critique the material with each other as in active learning. If passive learning was used with CP, students would learn how to identify power imbalances by repeating or agreeing with the conclusions of the powerful figure in their group (i.e., the teacher). There is necessarily a component of students asking questions, presenting their own personally-directed research on a topic, and discussing a topic with others so as to arrive at a particular group-discovered conclusion (instead of a teacher-provided conclusion); thus, an active learning approach provides students with a means of realizing how they, as individuals, can identify, understand, and challenge power relationships in a way that passive learning cannot.

Furthermore, CP takes the perspective that students should be learning about differences in how groups of people are treated, and what possible solutions could be.

This approach is highly valuable for any model of education that must be inclusive, considerate of various background and opinions, and seek to collaborate. In other words, CP may be useful for a model of education in a globalized society.

### **Metacognition**

In the context of learning, metacognition refers to a higher-order thinking function that actively controls the cognitive processes that are involved in learning (Livingston, 1997). This includes activities such as planning a solution to some problem, monitoring comprehension of some material, and evaluating the level of completion of some task. Metacognition enables success in learning and is associated with intelligence (e.g., Borkowski, Carr, & Pressley, 1987; Sternberg, 1986). However, the term metacognition is ambiguous because several different terms have been used to describe the same underlying phenomenon or some aspect of it (e.g., executive control, meta-memory, self-regulation) and the act of reflecting on our cognitive experiences has been examined, discussed, and analyzed for centuries (Livingston, 1997). Despite the differences between the terms and definitions, there is a common description of metacognition involving executive processes to oversee, manage, and regulate cognitive processes (e.g., Van Zile-Tamsen, 1996).

Metacognition is often associated with the work of Flavell (1979), who describes it both in terms of metacognitive knowledge and metacognitive regulation (Flavell, 1979; 1987). Metacognitive knowledge refers to the knowledge gained about cognitive processes that can be used to control them. Flavell divides this knowledge into three categories: person variables, task variables, and strategy variables (Flavell, 1979). Knowledge of person variables includes how people learn and process information, and

what we know about our own methods for learning (Flavell, 1979). Knowledge of task variables includes details of a task and what must be done to perform that task (Flavell, 1979). Knowledge of strategy variables includes details about possible cognitive and metacognitive strategies that could be employed (Flavell, 1979). Metacognitive regulation refers to strategies (sequential processes) that are used to control or manage cognitive activities and determine whether a cognitive goal has been met (Brown, 1987). For instance, if the cognitive goal is to identify certain key topics in a text, various strategies could be used to do the identifying and such strategies would be considered cognitive and not metacognitive strategies. However, to determine whether all of the topics were identified, and if the topics had been identified correctly, metacognitive strategies (such as self-questioning or self-reflection) would then be used.

Students who use metacognition, especially when trained in how to use metacognitive strategies, tend to be more successful in their learning and benefit more from instruction (Garner, 1990; Van Zile-Tamsen, 1996). Although there are various ways to train students in metacognitive strategies, the most effective approaches involve providing metacognitive knowledge and opportunities to practice metacognitive strategies such that they can evaluate the effectiveness of their approach and change as necessary (Livingston, 1996). Since individuals' metacognitive capabilities can be improved through proper instruction, and metacognition not only improves learning but also facilitates self-reflection, its use and promotion in an educational setting is consistent with an active learning approach, critical pedagogy, and the attitudes associated with a learning organization. As such, the presence of metacognition in a school, and its promotion by principals and teachers, and its usage by all members of the school would is

something important to measure as it is one indicator of the quality of active learning and learning organization leadership.

### **Theorizing a global model**

Bearing in mind the foregoing literature, some possibilities for a model of educational leadership for a global society can be considered. As mentioned in Chapter One, a global society is characterized by a high diversity of individuals and groups and a high degree of interconnectedness. Within such a society there may be a high risk of conflict resulting from differing and potentially contradictory goals, ideas, and resources. As such, any educational model for a global society needs to provide support for mutual understanding, cooperation, and conflict resolution; this is because those attitudes and skills would be critical for both succeeding in a global society as well as ensuring such a society can thrive. Thus, a starting point for a global education model is to examine the various theories discussed in this chapter and see which are the most appropriate for supporting mutual understanding, cooperation, and conflict resolution. Again, the theories will be considered in terms of the same three dimensions: leadership styles, organizational structure, and approach to learning.

In terms of leadership styles, the first style that is important to consider is transformational leadership as compared to transactional leadership. Since the transformational leadership style is meant to empower individuals, this involves mutual understanding. Teachers need to understand their students, so as to empower them, but students also need to learn how to understand themselves. This style was also more effective than transactional leadership for solving complex problems, which is also beneficial for conflict resolution. The second style that is important to consider is the

Tannenbaum and Schmidt leadership continuum. The continuum measures the degree of authority delegation, and when decision making is distributed it requires mutual understanding, cooperation, and conflict resolution in order to be successful. Thus, a higher level (five, six, or seven) on the Tannenbaum and Schmidt continuum would be more appropriate for a global model since those levels involve higher degrees of distributed decision making.

In terms of organizational structure, the first topic to consider is whether the structure is vertical or horizontal. A horizontal structure involves more distribution of decision making, teamwork, and cooperation than a vertical structure; thus, a horizontal structure would be more appropriate for a global society. Another significant topic to consider is the degree to which an organization is a learning organization. A learning organization empowers individuals, and supports cooperation and teamwork, and facilitates the organization's ability to adapt to new situations, all of which are important for proper functioning in a global society. As mentioned, the degree to which an organization is a learning organization can be measured through the INVEST framework. Thus, developing the leaders in a school so that they rank more highly on the six INVEST dimensions would be more consistent with the needs for a global society.

In terms of approach to learning, using active learning is likely the most appropriate. It empowers individuals, helps them work in teams, and also encourages deeper reflection and understanding of material. Working in teams facilitates mutual understanding in that students learn more about others. Likewise, deeper reflection on material allows students to better understand themselves, and thus have more information available to share with others when building mutual understanding. Thus, active learning

could be measured in terms of whether students practice teamwork, cooperation, sharing of ideas (such as through brainstorming), and reflection (such as through metacognition). Additionally, critical pedagogy is an important topic to consider. Conflict resolution and mutual understanding can be improved through a critical approach, whereby students are exposed to many differing (and often conflicting) viewpoints that they must examine and compare. In other words, students learn and become more comfortable with sharing, examining, and critiquing ideas and this may lead to better conflict resolution and mutual understanding.

In total then, it seems that an educational leadership model for a global society needs to have the following components: transformational leadership style, a score of at least five out of seven on the Tannenbaum and Schmidt leadership continuum, a more horizontal than vertical organizational structure, a score of at least seven out of nine on the INVEST dimensions (i.e., a high degree of learning organization), and an active learning approach with critical pedagogy.

However, this model is only a theoretical one. It is quite possible that leaders within schools are already engaged in such practices, or are performing something more appropriate to a global society than what has been examined in the literature.

Furthermore, the Leadership by Islam approach has been considered less appropriate for a global model, but this may be due to how it has been conceptualized in the literature.

This approach also needs to be explored more fully in practice, to see how it compares to the theorized model. Therefore, in Chapter Three, various practical situations will be explored to determine whether new ideas for a global model can be adapted in varying

contexts, whether the global model as theorized here is already being practiced, and the challenges the theorized model may face.

### **Summary**

Chapter Two focused on four main subjects: theories on leadership (e.g., modern leadership theories such as Maslow's Hierarchy of Needs, postmodern leadership theories such as Contingency Theory, and Leadership by Islam), theories on organizational structure (particularly Learning Organizations), theories on approaches for learning (e.g., active and passive learning, Bloom's taxonomy, critical pedagogy), and a potential model for global educational leadership. The first three subjects form the conceptual foundation for the leadership model. The particular theories that were used for the potential model were empirically explored, with the methodology for this exploration presented in Chapter Three, the results are presented in Chapter Four, and analysis of these results is presented in Chapters Five and Six.



### **Chapter Three: Methodology**

In this chapter, I will describe and discuss the methodology for empirically exploring the theorized global education leadership model. A research method is a specific and detailed procedure for addressing research questions. Very broadly, empirical research methods can be grouped into qualitative and quantitative approaches. Qualitative approaches to research focus on observations and subjective expressions, and tend to be used for in-depth understanding of human behaviour and the possible intentions involved (Mariampolski, 2001; Pawlyn & Carnaby, 2009). In contrast, quantitative approaches handle data that can be reliably and easily quantified, such that the measuring, collecting, and analyzing of data is a strong focus (Green, 2001). For this research topic, a qualitative approach is more appropriate; it is necessary to understand why people have made certain decisions and their reasoning behind them, even if their reasoning is flawed, and it is more likely that this understanding can be obtained through qualitative methods.

In the area of qualitative research though there are many different approaches. For this research, I will be using a Case Study approach. Other approaches that could be related to Educational Leadership include: Phenomenology, Grounded Theory, Action research, Narrative approach, and Case Studies. Each of these approaches is described below. Although there are other approaches in qualitative research (e.g., Ethnography, Collaborative approaches, Art-Based research) these will not be discussed here as they are unlikely to be useful for my research. After each approach has been explained I will discuss the relative merits of each and present a rationale for why Case Study is the most appropriate and relevant methodology for my research. After this discussion on

methodological approaches, I will present the methodology details for the study that was conducted for this research.

### **Rationale for Qualitative Research**

This research is qualitative in nature, with an exploratory research purpose. In other words, the purpose of this research is to examine available data to identify themes and, following from that, to create some new ideas regarding leadership in education in a global context and to better understand some factors surrounding this topic. Exploratory research is quite appropriate when existing theories are inadequate for a given context (Yin, 2013), as appears to be the case for this research. Furthermore, an idiographic approach is taken for this research; this approach is intended for understanding the meaning of individual phenomenon instead of generalizing specific events to a broader law or theory (Haynes & O'Brien, 2003). Although the ultimate goal of this research is to suggest a model for educational leadership in a global context, the data that were collected were not meant to create that model, but rather was meant to provide cases that exposed the relevance and need for a global educational leadership model. As such, the data was meant to help understand the existing circumstances of leadership in various schools, since that understanding can inform and guide future research on leadership styles and organizational structures for education in a global context.

This research is also taking the approach of interpretivism, or antipositivism, in which the object of study is studied from the inside (Heshusius & Ballard, 1996). A major aim of my research is to understand the intentions, motivations, and desires of school-based individuals, as well as how they perceive others in the same school. None of these data are 'correct' or reflect some universal truth about nature; rather these data

simply reflect the current state of one context (a single school and certain individuals in that school) from the perspective of the interview questions that were asked. As such, an interpretivist approach is the best one to handle this research goal. In other words, my research attempts to understand the state of a school and some of its inhabitants from the perspective of being in the school, rather than from the perspective of an outsider attempting to construct a picture of what the school might be like. It is important for this research to develop an understanding of what the subjects think about themselves, others they work with, and their environment. The important aspect is not what these people and the environment is like but rather what the *subjects* think of them. The only way to reliably gather such data is to do so from the 'inside' perspective. Furthermore, what the subjects think of the context is important because one major aspect of a learning organization is empowering individuals to learn, act, and make decisions in a self-directed manner (instead of other-directed, where actions are done solely because someone else told them to do so). What the subjects talk about, what they see as important, and how they perceive their relationships with each other will express how much they are empowered and what they have been empowered to do. Again, this can only be gathered from an insider interpretivist perspective, and not from mere observation and categorization of certain behaviours.

### **Possible Qualitative Methodologies**

In this section, several approaches to qualitative research will be described. Although I have chosen to use the Case Study approach, it is important to consider some of the alternatives in order to understand why the Case Study approach was chosen. An

explicit rationale for choosing the Case Study approach is given toward the end of this chapter.

### **Phenomenology**

Savin-Baden & Major (2013) described phenomenology as the study of the world that humans experience pre-reflectively (i.e., what humans experience before they categorize and conceptualize it). This research approach is derived from Husserl's philosophy of phenomenology (Husserl, 1907/1964). As a research approach, the main goal is to determine the common, underlying experience of participants (Creswell, 2007) so as to find the universal or essential phenomenon experienced. Owen described this as follows:

Phenomenology is primarily a study of essences (definitive reflective acts) and the meanings of exemplary cases, to find the possibilities for objective thought. Seeing essence is primarily about attending to the sensual experience of that which appears. Secondly it involves naming the definitive whatness of any object, and hence, is about the categories for naming. For instance, sciences are built on the essences, categories and boundaries they draw up, which define legitimate academic discourse. (1994, p. 19)

Since the phenomenon being researched is typically a concept, such as love or justice or beauty, it can be investigated in both its outward and inward form (Savin-Baden & Major, 2013). Outwardly a phenomenon can be expressed in objects and actions, while inwardly it can be expressed in thoughts, images, and feelings.

***Phenomenology - Data Collection.*** Phenomenology is flexible, in that it can be used across a variety of disciplines, fields, and topics (Savin-Baden & Major, 2013).

Other approaches tend to objectify and structure the data that is gathered, and this removes the data from the perspectives of the participants and the underlying experience itself; this is contrary to a phenomenological approach, for which the participant's experience is central (Savin-Baden & Major, 2013). The main way by which this experience is captured is through an unstructured interview. According to Seidman, this interview:

provides access to the context of people's behaviour and thereby provides a way for researchers to understand the meaning of that behaviour. A basic assumption in in-depth interviewing research is that the meaning people make of their experience affects the way they carry out that experience [...] Interviewing allows us to put behaviour in context and provides access to understanding their action.

(1998, p. 4)

### **Grounded Theory**

Grounded theory is a systematic methodology for constructing theories given only the unprocessed data (Savin-Baden & Major, 2013). In other words, this approach attempts to make sense of the data without an initial question, topic, concept, or theory in mind. Hence, it is a methodology for understanding social phenomena in a way that is not explicitly developed with existing theories or paradigms (Engward, 2013). Similarly, grounded theory is very well suited for exploratory research, in which a researcher is investigating a new topic or an existing topic from a new perspective (Milliken, 2010). One potential problem with grounded theory is that it obscures the researcher's role in data collection and interpretation, incorrectly assuming that the researcher is separate from the research results (Bryant & Charmaz, 2007). To handle this, researchers need to

be very careful that they do not have *a priori* determination of what perspective or concept they want to find in the data (Savin-Baden & Major, 2013).

***Grounded Theory - Data Collection.*** Given the need for a careful starting point in gathering and analyzing data, grounded theory researchers tend to place a lot of emphasis on being ethical and rigorously transparent (Savin-Baden & Major, 2013). Data is frequently gathered through observation, formal and informal interviews, and focus groups. However, this data can be combined with material from a variety of other sources (e.g., research papers, blog posts, discussion boards) since all of it could be considered data from which a theory can be derived. Once data is collected, the researcher reviews the data frequently until repeated common ideas and concepts become apparent; these common ideas are then tagged with codes, which are then grouped, categorized, and recategorized as the researcher continues repeatedly reviewing the data (Savin-Baden & Major, 2013). The final resulting set of categories forms the foundation for the new theory that has emerged from the data.

### **Action Research**

Action research emphasizes the need for research to be focused or centered on a particular issue or cause; research is then conducted to resolve that issue, such that whatever results from the research will be put into action (Savin-Baden & Major, 2013). In other words, this is research conducted while engaged in action for solving a known problem. Although this research methodology could be quantitative in nature, Savin-Baden and Major (2013) describe it as a method for qualitative research. McKernan (1996) argued that this approach has a long history within education, going back to early researchers of the nineteenth century (e.g., Bain, 1897; Buckingham, 1876). When

engaging in action research, there is a common seven-step process to perform: select a focus, clarify theories, identify research questions, collect data, analyze data, report results, and take informed action (Savin-Baden & Major, 2013). This process is meant to be cyclical, since it may take several attempts to properly solve the given problem. Since the researcher is likely part of another group who are actively working to solve the problem (i.e., practitioners and other researchers are likely working together), there is a strong need for communication and consistency of vision between all members of the group (Savin-Baden & Major, 2013).

***Action Research - Data Collection.*** Since action research is based on cycles of data collection, analysis, action, and reflection the actual data collection methods used tend to be flexible and emerge more naturally from the overall process (Savin-Baden & Major, 2013). Particular methods, and the type of data to collect, will vary depending on the specific problem to solve and the people involved in the overall process. Lewin (1946) provided an early model for how to design an action research study, and others have tried to produce their own. For instance, Elliott (1991) developed a model for collecting data that emphasizes performance improvement and professional development instead of the characteristics of stakeholders.

### **Narrative Inquiry**

Schwandt (2007) described the narrative approach as the study of the activities involved in generating and analyzing stories of life experiences and reporting that kind of research. In other words, it is the systematic gathering, analysis, and representation of people's stories from their own perspective (Etherington, 2013). However, it is also an umbrella term, meant to include the personal and human component of experiences as

well as consider the relationships between individual experience and cultural context (Clandinin & Connelly, 2000). The goal of narrative inquiry is to explore the personal experiences of others (Blumenfeld-Jones, 1995), so that the full complexity of situations - including the emotions, beliefs, values, and motivations of participants -- can be properly examined (Hatch & Wisniewski, 2002). The stories that are gathered are treated as knowledge, in the sense that they constitute the 'social reality of the narrator' (Etherington, 2004, p. 81) and provide researchers with some understanding of the depth, complexity, and richness of people's experience in their own words (Etherington, 2013). These data are thus clearly contextually situated, transient, partial, provisional, and characterized by multiple voices, perspectives, and meanings (Etherington, 2013). Thus, it should be clear that narrative inquiry takes a social constructivist and postmodernist approach to research, and is focused on the patterns present in a person's life and their own understanding, values, and beliefs about the world. However, narrative inquiry is also varied depending on the philosophical position taken. Researchers could focus on the content of stories, so as to understand the world outside the mind of the interviewee, or they could focus on the meaning of the stories, so as to understand the interviewee's perspective on the world (Polkinghorne, 1995).

***Narrative Inquiry - Data collection.*** In the narrative approach, the data being collected are personal stories. These stories can be collected in a variety of ways, including: journals and diaries, letters, field notes (observation), interviews, photos, and video (Leggo, 2008). As part of gathering stories, researchers clearly indicate their own role in the process. For instance, great researchers may include the questions asked of participants, their own comments in response to something a participant said, and the



context of how the data were gathered so that the full discourse can be understood (Etherington, 2013). The analysis of the data occurs throughout the process of gathering data, such that both collection and analysis are part of the same overall co-creation of meaning (Gehart, Tarragona, & Bava, 2007). It is 'co-created' because, although researchers are not trying to interpret the stories of participants in light of some 'grand narrative' they will nevertheless interpret the stories in light of their own understanding so that they can determine which questions to ask to further the discussion.

### **Case Study**

There is currently no agreed-upon or comprehensive definition of a case study. Simms (1996) defined a case study as a selection of epistemological methods. Stake (as cited in Haas, 2004) defined it as a selection of subjects for study. In the disciplines of law, medicine, and management a case study is merely an example of how to solve a problem instead of a method for empirical investigation (Gomm, Hammersley, & Foster, 2002). A case study could also mean research that is conducted within a bounded system, but some phenomena can have unclear spatial and temporal boundaries (Atkinson & Delamont, 1995). Despite these differences, there is some consensus regarding particular or important characteristics of case studies. One agreed upon important characteristic of a case study is that it focuses on a particular case or context, and not some population sample from which more generalized results could be obtained (Yin, 2008).

Case studies have several advantages. First, it is the best method for examining and determining special or unique characteristics of people and groups (Simms, 1996). Since other methods attempt to find more representative samples, non-

representative groups are best understood through a case study. A second advantage is that it is a method for discovering new areas of research (Platt, 1998). This is due to the richness of data that can be collected and the depth of analysis that can be conducted; both can provoke many questions, each of which could become the topic of further research. Another related advantage is that it produces new ideas to push research further (Eishenhardt, 2002). Just as a case study could identify some new topic of exploration, it can also identify some aspect of existing research that has not been explored yet.

The main disadvantage of case studies is that they are not generalizable. Since the study is limited to one context, and often a non-representative one, the results may not be generalizable to other contexts or population samples. Some researchers argue that this disadvantage is acceptable, since the purpose of a case study is to provide depth of detail and not holistic results (Lincoln & Guba 2002; Stake 1995; Stake 1994). Others argue that case study results can generalize to theoretical statements, not populations, and such generalizations are created through inference and comparative analysis (Gomm, et al., 2002; Yin, 2008).

***Case Study - Data Collection.*** Some of the more popular methods of collecting data for a case study include: interview, concentrated collective discussion, participatory and non-participatory observation, and recording of sound and/or video (Haas, 2004). Multiple methods may be used, and which methods are chosen depends on the purpose of the particular study. However, the data is more useful and valid when its collection involves: triangulation, a case-study database, and a rational chain of documents and witnesses (Haas, 2004). Triangulation means using multiple resources to create convergence (Yin, 2008). As more resources point to a common understanding or

interpretation, this increases confidence in the results. These resources can include multiple methods of data collection (i.e., comparing different means of exploring the same case), or multiple case studies (i.e., comparing different cases or contexts using the same means). Case-study database means an official database (i.e., central location) in which all the data can be stored, documented, annotated, and organized (Patton, 2002). Having the data in one location helps identify what was collected (as compared to how it was interpreted) and enables others to review the data. Rational chain of witnesses means that there is an organized structure and logical connections between the questions, collected data, processed data, and overall results. This provides readers with a clear connection of the steps that were taken in the study, facilitating greater understanding and protecting against attacks on the study due to misunderstanding.

### **Chosen Methodology**

For my research, the case study approach was used. In this section I discuss some reasons why this methodology was chosen, and some pragmatic issues that needed to be resolved when conducting the research.

### **Rationale**

Case studies are appropriate for exploring complex contemporary social phenomena with behaviours that would be impossible to manipulate in a laboratory. Since the research topic required access to that kind of data, it made sense to use case studies. Likewise, Yin (2008) mentioned that a case study is the best method for studying events or contexts that are: contemporary, complex, rich or deep in data, and difficult or impossible to duplicate in a laboratory setting. All of these criteria apply to this research.

When considering the other methods described above, they are less appropriate

for this research than a case study. Phenomenology focuses on the underlying experience of the participant to find the universal phenomenon that has occurred. This level of detail is unnecessary, particularly given the wide range of expected experiences. When participants are in different contexts (e.g., different countries, different schools, principals or teachers, etc.) the details of those contexts may be quite relevant to understanding the necessary leadership style. Although phenomenology does not reject context, it also does not consider context in the same way as a case study. Likewise, grounded theory is not appropriate because it does not work when there is a particular topic or question in mind to answer. In the case of this research, there is a very specific question in mind about educational leadership; grounded theory cannot be used when we have a particular question to answer.

Action research is also not appropriate for this research since it is focused on a particular issue or problem to solve through action. In my research I am attempting to understand the surrounding circumstances and attitudes of various individuals, and such an exploration is too vague of a problem for action research. Just as this research topic is too narrow for grounded theory, it is also too broad for action research. Finally, the narrative approach is not appropriate because it emphasizes the life stories of individuals and circumstances. Although such information could be useful for this research, that level of detail is not necessary; narrative information is only relevant for this research in so far as it helps to describe the context and possible obstacles that leaders face in their circumstances. That information is already obtained through a case study, and the additional depth that would be gathered from using a narrative approach is unnecessary.

**Pragmatic Issues**

Multiple case studies provide greater comparative depth (Yin, 2008). Since this is desirable, given the emphasis on comparing Western and Islamic countries, a multiple case study approach was taken. Three countries were studied: Canada, Turkey, and Iran. Each country provided a different religious-political outlook--Canada is predominantly secular, Turkey and Iran are predominantly Muslim (Sunni and Shiah, respectively)--and differed in the degree and depth of how vertical their political system's organizational structure is. Thus, the Canadian case study is a case study of Western leadership, while the Turkish and Iranian ones are case studies of different kinds of Islamic leadership. Although other countries could provide similar perspectives, these countries were chosen for the ease in which I could conduct this research (see the section on Participants below).

Within each country, one public school was studied (three schools in total). This research focused on public schools instead of private schools for two reasons. First, public schools are more representative of the general population (i.e., the lower socio-economic classes) as most people (regardless of the country being studied in this research) do not attend private schools. Thus, the leadership styles used in the public school system has the largest effect (i.e., influences the largest amount of the population in a way that does not require decentralization of education to each individual's home). Second, the close connection between the public school system and the ruling government of a country means that the government can strongly influence various aspects of the public school system (e.g., curriculum, administrative and organizational structure, salaries, etc.). Hence, it is more likely that the influence of the ruling government will be seen in the public school system than in the private school system.

Since I am investigating countries that differ in the religious-political orientation of their respective governments, it is much easier to explore how these orientations play out in education by focusing on the public school system. While it is quite possible that a private school in one or more countries may have a leadership style appropriate for a global society, gathering such information will not help to identify potential barriers to using that style within the public school system. Future studies may be conducted that focus on private schools to explore different leadership styles.

### **Research Questions**

The general goal of this research was to identify a model for educational leadership that is appropriate for a global society. This was done through exploring three interrelated dimensions of educational leadership, in theory and as practiced in the three case studies. These dimensions are: Leadership Style (e.g., transformational or transactional leadership; democratic or authoritarian), Organizational Structure (e.g., vertical vs horizontal; learning organization), and Approach to Learning (e.g., active, passive, or traditional). These dimensions are interrelated in that the state of one is likely to influence the others. For example, if a teacher prefers a transformational leadership style or an active learning strategy, but the organizational structure is not designed for this, then the teacher may be hindered from realizing the benefits of that style or strategy (see Cruz-Cunha, 2010). Thus, for each case study the general goal was to investigate how these three dimensions of educational leadership were practiced within the school, and to gain a sense of any potential barriers to changing this leadership.

These three dimensions find their expression in some of the research questions presented in Chapter One. Now that the theoretical foundations of this research has been

presented, the seven research questions can be restated and examined in terms of their theoretical source, relationship to the three aforementioned dimensions, and relationship to the goal of this research. The specific research questions being explored were:

1. What leadership styles are used in the public education systems of the studied countries? (i.e., are the school leaders using a transactional or transformational leadership style?)
2. To what degree are these leadership styles authoritative or cooperative, as measured by the Tannenbaum and Schmidt model (Tannenbaum & Schmidt, 1973)?
3. Are the organizational and educational structures of the education systems of the studied countries more vertical (i.e., top-down or hierarchical) or horizontal (i.e., team-based) in nature?
4. To what degree are the schools in the studied countries learning organizations, as measured by the INVEST model (Pearn et al., 1995)?
5. What approaches to learning are in use? (e.g., do the methods encourage personal growth? Do they instead encourage conformity? Or adapting to change? etc.)
6. If a school is using a leadership style, organizational structure, or approach to learning that is maladaptive for a global society (e.g., the style promotes inherent superiority of one group over another, or highly centralized decision-making, or uncritical conformity to one group's ideology) then what are some factors that could prevent or delay changing to a more adaptive style?
7. What could be an appropriate model for educational leadership for a global society? (i.e., what leadership style, organizational structure, and approach to learning could work best for education in a global society)

Research questions 1 and 2 address the leadership style dimension, questions 3 and 4 address the organization structure dimension, and question 5 addresses the approach to learning dimension. In particular, RQ1 looks at whether teachers and principals are following a transformational or transactional leadership style (Lussier & Achua, 2015), or one of the other theories discussed in the literature review. RQ2 looks at what level teachers and principals lie along the Tannenbaum and Schmidt leadership continuum (Tannenbaum & Schmidt, 1973). RQ3 looks at the structure and type of organization used in the school (horizontal, vertical), while RQ4 uses the Learning Organization theory (Senge, 1990) and the INVEST model to measure it (Pearn et al., 1995). RQ5 examines whether the teachers understand, approve of, and use active strategies for learning (active learning, metacognition, critical pedagogy, etc.) and whether the principals are in agreement. RQ6 examines areas that might be seen as challenges to the proposed educational leadership model for a global society, which is the purpose of RQ7. If there are specific items that come up in a case study that might make adopting a more global model difficult, but these items are not captured in the other research questions, then RQ6 was needed to ensure miscellaneous factors could at least be identified. Figure 3.1 below illustrates how these questions are interrelated and connected to the ultimate goal (RQ7) of this thesis.



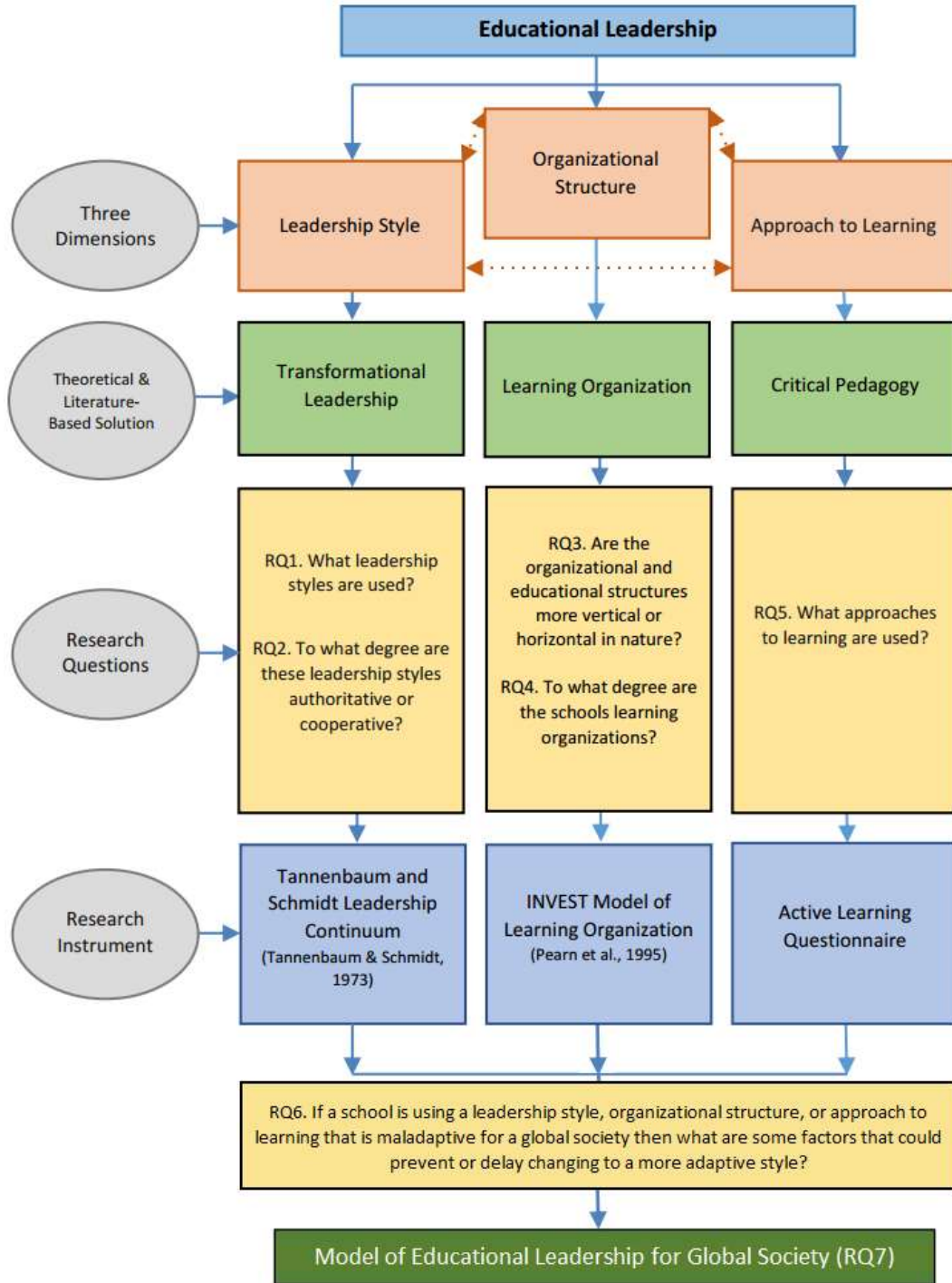


Figure 3.1. Illustration of the relationships between the goal and dimensions of the research, research questions, theoretical foundation, and study instruments.

Instruments were created to qualitatively answer each question (see Data Collection below). To create triangulation within each case study, the perspectives of several kinds of stakeholders were explored (i.e., the research questions were explored from the perspective of students, teachers, and principals). Using multiple case studies provided triangulation across various contexts, as suggested by Yin (2008).

### **Data Collection**

Given that the chosen methodology is a case study, one very effective means for collecting data in this methodology is conducting interviews with participants (Yin, 2008). An interview involves talking with a participant about one or more topics. Interviewing is a common research technique, and is most appropriate for trying to understand the perspective of an individual. Interviews have a varied degree of formality, with informal being one end and formal being the other end of the spectrum. In formal interviews, the interviewer asks specific questions, and there is no deviation from these questions (McKenzie, 2014). In informal interviews, the interviewer uses questions to guide discussion, but often asks follow-up questions that were not originally planned, or changes the order of questions to make the discussion more natural (McKenzie, 2014).

Therefore, the main data collection method for this study was interviewing. Both formal and informal interviews were conducted. For all participants a formal interview was conducted, with the questions listed in Appendix A. The formal interviews were conducted to ensure consistency between participants and to ensure that the data being collected was directly pertinent to the research instruments. For some of the participants an informal interview was also conducted; this involved a short discussion with them about the purpose of this study, the state of their school, and their expectations for the

interview. These informal interviews were conducted to help participants feel more comfortable for the formal interview and allowed some of the formal interview questions to be asked in an indirect way, since it was believed that participants might be more willing to talk about a particular topic indirectly than directly. Some demographic information was also gathered from participants (e.g., age, gender). The formal interview questions were derived from the various theories previously mentioned (see Figure 3.1), with a stronger emphasis on the INVEST model because of similar or overlapping questions. For instance, asking questions about the Enhanced Learning dimension of INVEST was related to questions about active learning and transformational leadership. In all of the interviews, I did not give participants a copy of the questions beforehand; their first exposure to the questions was from my interview<sup>34</sup>. Since the data gathered were interview responses from participants, the primary source of data for this research was self-reports.

### **Participants**

At each school, three categories of participants were interviewed: students, teachers, and principals. While family members would have been desirable to interview, they were not interviewed since it was thought that they might pose too great of a challenge with regard to consistently including them in each case study. Within each country, five participants were interviewed: two students, two teachers, and one principal. Thus, the total number of participants in this study was 15. However, the school in Turkey to which I was directed for the interview was clearly a biased one (as explained in the procedure below). Thus, I also interviewed two more teachers and two more students

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<sup>34</sup> Although the Turkish school board wanted a copy of the interview questions, I had no indication that they told anyone at the Turkish school about these questions.

in a different Turkish school. The results of this separate interview are referred to in Chapter Five as “Informal Turkey Interview.” Whenever results from the Turkish case study are mentioned, it does not refer to this informal interview unless explicitly stated as such.

The comfort of participants can be particularly important when they come from a society where speaking openly outside of immediate family or very trusted individuals is uncommon, whether this is from cultural practices (e.g., women are not allowed to talk to men), or from fear of negative treatment by others. Due to my background and experiences, there are several reasons why it was potentially easier for me than other researchers to interview participants in these countries. First, I was born and grew up in Iran, I speak Farsi, and have worked in the Iranian education system. This enabled me to more easily connect with and interview others in the Iranian education system, and my knowledge of the local customs facilitated more natural interviews. Second, I have lived in Canada for many years and am fluent in English. Although Canadians were generally more open to this research than Turkish or Iranian participants, it was still easier for Canadians to share their ideas with someone who spoke English and was familiar with the way Canadians act and speak. Third, my first language is Turkish and I am aware of many customs of the Turkish people. This led to more natural interviews with people in Turkey. Thus, in all three of the countries in which this study was conducted, I was able to provide a comfortable interview setting, and was familiar with each of their prevailing political ideologies, as well as local customs and tradition.

**Procedure**

First, this study was reviewed and approved by the Research Ethics Board at the University of Windsor. Forms describing this study were then given to school boards in the three countries (Canada, Iran, and Turkey). The purpose of these forms was to describe the study to school board administrators, seek their approval to engage with their employees, and have them advertise the study to their respective schools. In Canada, the Greater Essex County District School Board (GECDSB) was invited to participate. In Iran, an invitation to participate was forwarded to the school board for territory 1: Tabriz, the capital of the East Azerbaijan Province. In Turkey, I contacted the central authority for education, the İSTANBUL İL MİLLÎ EĞİTİM MÜDÜRLÜĞÜ, for permission to conduct the study.

In the Canadian and Iranian case studies, permission to conduct the interviews was granted by the respective school boards but no specific school was suggested or required. However, I was required to send each school board the names of all participants for their records. For Canada and Iran, I sent emails to the principals of specific schools within the chosen school board to solicit participation as per the school board's recommendation. From those who responded, one school in Canada and one in Iran were chosen for the interview. In the Turkish case study, I was required to give the central authority of education a translation of all the questions that would be asked and a summary of the research proposal. When they approved the study, they directed me to a specific school to conduct the interview. Although a public school, in the sense that it was publically funded, registration in this school is highly restricted and competitive. As such, it was not representative of an average or typical secondary school but rather an

elite public school. Even if there was little difference in the quality of education, the perception that participants were associated with an elite school as opposed to a typical school could be problematic with regard to drawing conclusions from the data. For the Canadian and Iran case studies I tried to use a school that was ‘normal’ or typical for the area in which the study was conducted. If the Turkish school was too atypical, relative to the average within the Istanbul province, then comparing the case studies may say more about local variation than cross-cultural variation. Although I contacted this school and conducted the interview there, I also contacted another school whose teachers I knew to conduct a second set of informal interviews. The second school was meant to provide balance in the Turkish case study in the event that the first school was very atypical.

Once a school principal agreed to participate in the study, other participants (teachers and students) were recruited by email. This also allowed me to arrange a time and place to conduct the interviews. The interviews were conducted in person, in a one-on-one manner, in a quiet area easily accessible to the interviewee (typically, it was in a room in their school). Participants were first given a letter of information that described the study in more detail (though they had been given this already with initial contact). If participants had any questions about the study, they were able to ask them here and the researcher would answer those questions; there was no time limit for this. After all questions (if any) had been answered, participants were asked to sign a consent form. Part of the consent form also asked for consent to audio-record the interview.

After consent was obtained, the interview itself began. The interviews lasted from 35 to 60 minutes. A semi-structured format was used: participants were asked the questions listed in Appendix A, but occasionally I would ask follow-up questions for

more clarity or detail. The interviews in Canada and Iran were audio-recorded and transcribed in whatever language the interview occurred, while the interviews in Turkey were not audio-recorded and hand-written notes were taken instead. After transcription, the interviews were translated to English (if necessary), categorized according to type of participant (i.e., whether student, principal, or teacher) and then analyzed. The interview responses were kept confidential to the primary researcher. In order to protect the anonymity of the interviewees with regard to those reading the results, the responses were assigned random ID numbers. Audio recordings were destroyed after transcription. Participants were reminded prior to obtaining their consent that they could skip any question they did not want to answer.

#### **Analysis of interview data**

Since the data was qualitative in nature, and limited to the particular cases, a particular method of analysis was chosen. Regardless of the particular method used, Yin (2008) mentions four major principles for the context surrounding conducting and reporting on the analysis. The first principle is that the analysis should rely on the relevant evidence. When conducting the analysis, it should be clear to the researcher how it is based on the collected data. When the results are reported, it should also be clear to the reader how the results are based on the data. The second principle is to include major rival interpretations. This helps to show alternative ways of understanding the data and increases confidence in the one used by the researcher, as the opposing ways are available for the reader to compare against. The third principle is to address the most significant aspect of the case study, rather than analyze and report on all the minor parts of it. The last principle is to use the researcher's prior knowledge in the analysis. The

purpose of this is for increasing the depth of the analysis, as the researcher's understanding may include various questions or ideas that could be further explored in or answered by the data. The goal is not to show how the data supports the researcher's existing knowledge, but rather to use that knowledge to bring out more possibilities from the data.

### **Ethical Considerations**

This research involved interacting with people, and thus it needed to go through an ethics review. Furthermore, this research followed the Tri-Council ethical policy (CIHR, SSHRC, & NSERC, 2010) and, at least for the interviews in Canada, Canada's privacy laws. This research involved informed and voluntary consent. In order to gain this consent, participants were given a brief outline and description of the purpose of the study before recruitment; by the time they were interviewed, they had already acknowledged consent and had signed a consent form. Thus, before the study I ensured that participants clearly understood the study, its risks and benefits, and while the interview was being conducted I reminded participants that they had the right to not answer questions or completely withdraw from the study without any negative consequences to them.

Participants should also benefit from this research (CIHR, SSHRC, & NSERC, 2010). One benefit to participants may have been the ability to speak freely about their experiences (see the paragraph on harm below). Sharing this information may have benefited them indirectly, as it could eventually lead to an improvement to the education system, but it may also have benefited them directly because they will have had a space in which they could share concerns, difficulties, or successes with an independent party.



Since I was not an employee of any of the schools in which the participants worked, there was no potential for disruption of power or authority in their schools, nor any potential for consequences directly caused by me (since I have no power within their school system). Yet, since I am conducting and intend to publish this research, I may have the power to influence policy makers and people who have authority such that desired changes may occur.

Participants should not experience any kind of harm in this research (CIHR, SSHRC, & NSERC, 2010). Since the goal of this research is to collect people's opinions, there should be no harm that results (certainly no physical harm). However, participants may have concern for harm if they begin speaking out against authority; this concern is not unfounded, as there may be actual consequences in all three countries for saying something against authority figures or against dominant ideologies / mental models. The risk for this type of harm was mitigated in two ways: 1) confidentiality and anonymization of responses should help protect people against negative consequences of anything they say; and 2) participants were reminded that they need not answer questions that they feel uncomfortable or unsafe discussing. After the responses were transcribed, the original audio recordings were destroyed; this will further protect the identity of participants, which is another ethical requirement of the Tri-Council policy (CIHR, SSHRC, & NSERC, 2010). In any reporting of these comments, aggregate information was presented and direct quoting of comments were associated with anonymized pseudonyms (e.g., Canadian Student 1, shorthanded to CS1); since the name of the schools were not provided, the individuals involved in the study cannot be identified (reciprocally, I did not record or report the names of the schools). For all of this

information (i.e., comments, responses, demographics), I kept the digital copies physically and electronically secure by limiting the number of physical locations the data was stored to just one computer and using encryption where appropriate.

### **Limitations of this research**

There were several limitations to this research that should be discussed. First, this study used a qualitative case study approach and has all the limitations associated with that methodology (e.g., lack of generalizability to populations). Second, even though the goal was to study a few schools, this was still a small number relative to the total number of schools in each country. This further complicates any attempt at generalization, though this is a minor issue given the qualitative nature of the proposed research. Third, despite the ease with which I conversed with participants (regardless of country) there *may* have been bias in their responses due to my background. For instance, a Canadian participant may have been less willing to say certain things since I come from an immigrant background. A participant in Iran may have been more willing to discuss the problems of his/her country, because he/she felt comfortable doing so to someone born in that country, and thus glossed over other positive points that could have been said. Such biases were managed through greater number of participants and careful discussion during the interview but were probably not eliminated. Fourth, the nature of the governmental structures of a country may have limited the amount of information available to me as a researcher, whether from official government statistics or administrators being unwilling to talk about certain issues of leadership. I did not have difficulty entering or exiting these countries, nor with informally conversing with people in the education system. Fifth, and finally, since this study used an interview-based

approach in multiple languages, there may be bias in the questions asked and the resulting translations. The interviews were conducted in whatever language was the most comfortable for participants (English, Turkish, or Persian) and then translated into English. Since I translated the responses, it was necessary to interpret the responses before they were presented as results; while I attempted to be unbiased in my translations, and used any relevant contextual information gathered from the participant (since I was also conducting the interview), the possibility for bias still existed.

### **Summary**

In this chapter the research methodology for exploring the theorized global education leadership model was presented. In particular, the research explored leadership theories (e.g., the Tannenbaum & Schmidt leadership continuum), organization theories (Learning organizations through the INVEST model), and approaches to learning (e.g., active learning, critical pedagogy). This chapter also discussed various empirical methods for conducting such research so as to explain why a case study approach was used. The main data collection method was interviewing, with the interview questions available in the Appendix and Chapter Four. In Chapter Four I will present results from this study, while an analysis of this data through triangulation will be presented in Chapter Five.

## **Chapter Four: Results**

In this chapter, I will present the data from my study, with analysis of this data including triangulations presented in the following chapter. This chapter is divided into five main sub-sections: the education systems in the studied countries, details of the participants, and responses from the principals, teachers, and students.

### **Education systems in the studied countries**

Here I will present some summarized data about the education systems in Canada, Turkey, and Iran. In particular, I will focus on the areas of each country in which the study was conducted: the province of Ontario in Canada, the province of Istanbul in Turkey, and the province of East-Azerbaijan in Iran. Hence, the purpose of this sub-section is to provide a wider context for the data.

*Canada.* In Canada, the education system is primarily public (Frenette & Chan, 2015). Private schools are available, about 1907 in total with 963 of these in Ontario alone (OFIS, 2012), but enrolment in public schools is much higher. Roughly 8% of all students in Canada, and 6% of students in Ontario, attend private schools (OFIS, 2012). Education is considered a provincial responsibility in Canada. Thus, the curriculum for the public schools, and any expected standards for private schools, is handled at the provincial level and not the federal level (Howe & Prochner, 2012). The Ministry of Education, at the provincial level, oversees the K-12 education system. Within a province, the education system is composed of multiple school boards, each of which manages many individual schools (McKeown & Nolet, 2013). The education system is typically divided into three categories: primary (grades 1 to 8), secondary (grades 9 to 12), and tertiary or post-secondary education (University and Community College)

Development, and not the Ministry of Education, handles tertiary education. However, some school boards may divide this structure differently by including a middle school (junior-high school). In Ontario there is also full-day Junior Kindergarten, for children aged 4, and Senior Kindergarten, for children aged 5; although it is fully funded by the province, both levels of Kindergarten are optional (Peterson & Riehl, 2016). Other provinces offer only one year of Kindergarten as part of the public school system. There are no differences between boys and girls in terms of requirements or opportunities for their education in the public school system. Both boys and girls attend classes together (i.e, there is no sex or gender segregation).

Education of some sort (public) is mandatory for everyone from ages 6 to 18 years old (unless a high-school diploma is obtained before age 18) (Ontario Ministry of Education, 2007). Although post-secondary education is recommended by school counsellors and parents, and is a common requirement for employment, it is not legally required (Hansen, 2009). In Ontario, students older than 21 years of age cannot attend the public high schools (see Ontario Ministry of Education, 2016, section on Adult and Continuing Education); if they want to continue their education, they must do so through adult learning centres or other institutions that offer high-school diploma courses. For Ontario, the elementary school year goes from Labour Day in September until the last week of June, though other provinces may have different lengths of the school year (Ontario Ministry of Education, 2009).

Since 1998, Ontario elementary schools have had standardized testing in (Grades 4 and 6) to determine how well students are learning math and language-arts curriculum

material (Elliott-Johns & Jarvis, 2013). This testing is part of the EQAO (Education Quality Act of Ontario), and has been highly controversial in Ontario because of how it affected public funding; schools that ranked higher on the EQAO tests tended to have more funding from the Ontario government and, although it was done intentionally to encourage schools to have higher performance, there was concern that some schools could become continually disadvantaged (i.e., always get significantly less funding) because various factors (e.g., families and schools unable to afford support material for struggling students, language problems due to parents not being fluent in English) may prevent them from fairly competing against higher performing schools (Pinto, 2012, DeVault, 2008). Although some other provinces have similar tests, there is no standardization across the country. Furthermore, there are no forms of standardized testing for acceptance to post-secondary schools<sup>35</sup>.

Schools across Canada operate predominantly in English, with French-language classes required from Grades 4 to 9 (Hayday, 2005). However, some provinces include schools in other languages (usually French); for example, most of the schools in the province of Quebec are French-only. In the other provinces, Ontario included, there are some French-Immersion schools, which operate mostly in French (Hayday, 2005). Despite the presence of the specified French or predominantly French schools, the dominant language of instruction in Canada is still English (Hayday, 2005), with the exception of Quebec.

Canada has had a controversial history with religious schools in the public education system. In Ontario, as well as in some of the other provinces, most areas have

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<sup>35</sup> Many post-secondary schools use standardized English language tests for International students, but this is at the discretion of the school and is not mandated provincially.

two distinct school boards: a secular board and a Roman Catholic board (Bosetti & Gereluk, 2016). This allows Roman Catholic schools to operate within the public school system for those parents who would prefer a Christian (Roman Catholic) education instead of a secular one; parents can choose to send their children to either type of school, but individual Roman Catholic schools may place other restrictions on the students such as requiring them to be baptised or confirmed in the Roman Catholic Church before being allowed to attend or be educated past certain grade levels (Bosetti & Gereluk, 2016). However, the main differences between the Roman Catholic and secular public schools are a yearly-required course on religion and optional (but encouraged) participation in regular church services (Bosetti & Gereluk, 2016). For instance, Roman Catholic schools will have daily prayers while the secular schools do not offer any such religious expressions, except occasionally as student-run clubs or events. The controversy of this policy is that, especially in Ontario, funding is provided for schools of one religion (a specific sect of Christianity) but not to other religions to the same degree or at all (Richter, 1997). Despite this option for a religious education though, 64% of students in Ontario attend secular public schools (Van Pelt, Clemens, Brown & Palacios, 2015).

***Turkey.*** In Turkey, education is primarily provided through a public school system managed at the national level by the Ministry of Education (OECD, 2013). The curriculum is determined by the national government and applied to all schools regardless of their location, though private schools can have additional offerings. Management of public schools starts at the national level and proceeds downward to school boards at the provincial level, and then to individual schools (Indicators, OECD, 2007). The school system is divided into three levels: primary (grades 1 to 8), secondary (grades 9 to 12),

and tertiary (University) (OECD, 2013). Although there are private schools, most students attend public schools due to the relatively high cost of private school education (Indicators, OECD 2007). There are no differences between boys and girls in terms of requirements or opportunities for their education in the public school system. Both boys and girls attend classes together (i.e, there is no sex or gender segregation).

Turkey allows four different kinds of private schools (Nohl, Akkoyunlu-Wigley, & Wigley, 2008). One category includes private schools operated by Turkish individuals, offering education at the pre-primary, primary, and secondary level. A second category includes private schools for Greek, Armenian, and Jewish minorities at the pre-primary, primary, and secondary level. These schools were created during the days of the Ottoman Empire and their existence is guaranteed under the Lausanne Treaty of 1876 (Özbek Hadimoğul, 2008). A third category includes private schools operated by foreign governments (France, Germany, Italy, Austria, and the United States), again guaranteed by the Lausanne Treaty, though they can be attended by Turkish citizens as well as foreign nationals (Nohl, Akkoyunlu-Wigley, & Wigley, 2008). A fourth category includes private schools intended for international students that offer the Turkish curriculum (Nohl, Akkoyunlu-Wigley, & Wigley, 2008).

Education is mandatory for all citizens aged 6 to 18, with the public school system provided free of charge (funded by the national government) (OECD, 2013). Those age requirements are recent: as of 1997 students were required to attend school for 8 years, and in 2012 that became 12 years. Before 1997, students were only required to attend 5 years of education. Tertiary education is not required, but socially encouraged and highly desirable by parents and employers (Nohl, Akkoyunlu-Wigley, & Wigley,



2008). However, acceptance at any university (with the sole exception of the Open Education Faculty at Anadolu) is dependent upon obtaining an appropriate score on the National Entrance Exams, such that acceptance at a more highly ranked university requires a higher score on the exam (İnal & Akkaymak, 2012). All schools in Turkey operate primarily in the Turkish language (Nohl, Akkoyunlu-Wigley, & Wigley, 2008; İnal & Akkaymak, 2012). This is true even for minority-directed private schools, such as schools for Jewish students, and for schools in territories of ethnic minorities, such as the Kurds, whose native language is not Turkish (Sirkeci, Şeker, Tilbe, Ökmen, Yazgan, & Eroğlu, 2015).

Before the Turkish republic was founded in 1924, the country had almost 480 schools dedicated to an Islamic education in terms of memorizing the Quran and learning theology (Özbek Hadimoğul, 2008). In 1924, all of these schools were closed; the public education curriculum has since been developed to emphasize being secular (Özbek Hadimoğul, 2008).

*Iran.* In Iran, the education system is primarily public with only 11.6% of students enrolled in private schools (Khabar Online, 2015). The public school system is managed at the national level (similar to the United States of America); it is the central government that determines the curriculum, and information passes from the national level to provincial school boards and then to individual schools (Seidman, 2008). Public schools can offer courses outside the centrally mandated curriculum, but generally do not due to lack of funds (Seidman, 2008). Typically it is private schools that offer alternate courses, but they are still required to follow the national curriculum; any other courses that private schools offer are in addition to the curriculum-required courses (National

Research Council, 2003). The school system is divided into four levels: primary (grades 1 to 6), middle (grades 7 to 9), secondary or high school (grades 10 to 12), and tertiary (university). Kindergarten (i.e., pre-grade 1) schooling is available, but in private schools only (National Research Council, 2003).

Although public school funding is available from grades 1 to 12, schooling is only mandatory from grades 1 to 9 (ages 6 to 15); high-school is optional for students (Seidman, 2008; Arasteh, 1962). However, if students want to attend university they are required to obtain a high-school diploma (i.e., complete grades 10 to 12) and then pass the national university entrance exam (Tabrizi, 2013). The score obtained on the entrance exam determines which universities a student can attend. The Iranian school year runs from September 21st to June 20th, with the major break being for New Year celebrations (March 21 until around April 4th), and is the same length throughout all provinces and schools (Tabrizi, 2013). Boys and girls have the same expectations for completing their education, though there are differences in the material they are taught regarding their expected role in society (Paivandi, 2008). Boys and girls do not take classes together (i.e., public and private schools are segregated by sex); usually entire schools are for one sex only, with teachers of the same sex (i.e., there are boys-only schools with male teachers and girls-only schools with female and male teachers; principals are always male though).

All public schools in Iran operate in Farsi (Persian), regardless of the native language of the students (Tabrizi, 2013). This can be particularly problematic for students of ethnic minorities that do not speak Farsi as their first language (Tabrizi, 2013). For instance, the Azerbaijan province in Iran has a large Turkish population that does not

speak Farsi natively and there are difficulties in their schooling because of language differences (Tabrizi, 2013). In addition to Farsi, students are required to attend Arabic classes starting from Grade 4 and English classes starting from Grade 7 (Tabrizi, 2013). Other language classes may be available, but are entirely dependent on the school and are more common in private than public schools.

In the early 1900's, Iran had a kind of school (Maktab) that was run by members of the clergy and was dedicated to memorizing the Quran and learning theology. However, these schools were closed in 1925 and the public school system was developed in a more secular fashion, modeled after certain Western countries (e.g., the United States of America, France, Germany) (Marashi, 2011; Jahanbegloo, 2004). Since the Islamic Revolution in 1979, though, the public school system has changed to re-incorporate Islamic elements while still retaining the rest of the curriculum (Paivandi, 2008). The most obvious addition is the Arabic classes; these classes are primarily about learning the Quran, and the Arabic language as it is expressed through the Quran, rather than learning about the Arabic language in general. Thus, the Arabic classes are, in practice, classes on the Quran (Tabrizi, 2013). There is also a required course on religion, taught by regular teachers and not members of the clergy. Daily prayers are performed within the schools, overseen by a member of the clergy, but participation in such prayers is not mandatory (Mahallati, 2016).

### **Participant Description**

As previously discussed, interviews were conducted with one principal, two teachers, and two students in each of three countries (Canada, Turkey, and Iran). In each country, these participants were from the same public high school. To more easily

identify which responses were from which participant, I have identified participants in the texts using codes such as CP for Canadian principal, CT1 for first Canadian teacher, CT2 for second Canadian teacher, CS1 for first Canadian student, CS2 for second Canadian student (see Table 4.1). Since age and gender distribution may be relevant, this information is presented in Table 4.2 below.

Table 4.1.

*Codes used for participants' comments throughout the text*

Participants/Countries	Canada	Turkey	Iran
Principal	CP	TP	IP
Teachers 1 & 2	CT1, CT2	TT1, TT2	IT1, IT2
Students 1 & 2	CS1, CS2	TS1, TS2	IS1, IS2

Table 4.2.

*Age and gender of participants*

Country	Teacher Gender	Students (Gender / Age)	Principal Gender
Canada	Male, Female	Female / 17, Male / 17	Male
Turkey	Male, Male	Female / 16, Male / 16	Male
Iran	Male, Male	Male / 17, Male / 17	Male

### **Principals' Responses**

This section lists responses from all of the principals to the questions asked of them. The questions were organized in terms of the six INVEST factors, so the responses will be presented using the same structure. A list of questions corresponding to each factor is shown in a table before the appropriate sub-section of responses. For example, Table 4.3 is below and it lists the questions asked for the Inspired learners factor.

Immediately following this table is the sub-section containing responses for those questions. If no response is given, it is because the participant either chose not to answer the question or indicated that he or she had already answered in a response to a previous question.

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Table 4.3.

*Interview questions for principals for the Inspired learners factor*

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Shorthand	Question
PI1	How motivated are you to learn? Why?
PI2	What do you think is the source of your motivation to learn?
PI3	Who do you feel is responsible for your learning? Why do you feel this way?
PI4	What do you think of self-actualization?
PI5	What about group-actualization?
PI6	Do you think self- and group-actualization are necessary things to achieve? Why or why not?
PI7	Do you believe that self-actualization should be a personal objective? Why or why not?
PI8	What experience or value do you gain from mistakes, if any?
PI9	Do you think each person has an opportunity to grow from their experiences, both good and bad? Why or why not?
PI10	What are your thoughts on self-improvement? Do you think this is necessary?
PI11	Do you believe that self-improvement should be a personal objective? Why or why not?
PI12	How motivated are you to learn new things?
PI13	How motivated do you think others in your school are to learn new things?
PI14	What relationship do you think exists between someone's learning and his/her performance?
PI15	What do you think of the status quo of your school?
PI16	Do you think others would agree or disagree with you?

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*Inspired learners.* When talking with the Canadian principal, it was clear he was interested in self-improvement. For instance, his response to PI4 was:

As a leader, I think self-actualization is very important. I would like to encourage people to become self-motivated, but of course I welcome other people to motivate me. I think using both methods will be perfect [self-motivation and other-motivation], but I believe money is not a good reason for motivation. Some people would like to be a leader because they like power, the title, money, and so

on. But I believe these are not the primary reason. I motivate myself because I like my job. (CP)

Given that this response was about improving others, he was asked about self-improvement: “Definitely, I prefer to improve my skill and understanding through my own-learning. I would like to finish my PhD, and there are still many books I want to study.” When asked to explain more about his motivation (PI1), the principal explained:

I motivate myself and others for higher quality teaching because I believe the world, and our society, has changed; we cannot follow a traditional model, and role models are the best model to follow. In other words, as an administrator, principal, and leader of this school I would like to be a positive role model. Oh, I would also be a role model for staff too of course.

When asked about whether there were specific things he was learning for his PhD that could be applied in his role as principal, he replied: “Not all of them [the theories being learned]. As a leader, I want to first demonstrate that I appreciate the efforts and work of others.”

The Turkish principal also suggested that self-improvement is quite important (PI10): “Yes, self-improvement is a good method for an education system. We use it in the school here.” (TP) He also said: “All of the teachers, staff, and even myself have to improve our knowledge, because this is one of the best schools in Istanbul and Turkey.”

When asked about the methods of motivation that he prefers (PI2), he said: “My motivation is my job. I have many responsibilities here, so I have to work hard to fulfill them.” He later added “Having a higher income is a motivator for many people, but I believe the results of our actions are much more important.” When asked about how

motivated the teachers may be (PI13), he said: “The teachers in this school know their responsibilities. However, I have to monitor the quality of teaching that occurs here so it remains high.”

The Iranian principal gave a slightly different answer for the importance of self-improvement (PI10) when he said: “Self-improvement is a good method and necessary for education, but in Iran the teachers and other staff have many economical problems. For them, the first step is to handle their cost of living” (IP). When he was asked to elaborate on why self-improvement is necessary (PI11), he said:

In the education system we have to improve our knowledge. Actually, students are so fast with learning new things that we have to keep up sometimes. Students have many sources for learning information, such as the Internet, computers, satellites, friends, and so on. These sources are also available for teachers and principals though.

When asked about his own motivations (PI12), he answered: “Education is an important issue and our country needs educated people. I believe I am here to help solve this need, and that is my motivation for the work I do.”

Table 4.4.

*Interview questions for principals for the Nurturing culture factor*

Shorthand	Question
PN1	What are some principles of your school for personal learning?
PN2	What are some principles of group learning?
PN3	What are some principles of personal and group learning at the institutional level?
PN4	What happens if someone tries to go above and beyond expectations? (e.g., are they rewarded, what kind of reward, are they ignored, is there jealousy from colleagues, etc.)
PN5	What support do you think the general climate of your school gives for mutual respect, precision, and trust?
PN6	What are your opinions of learning from daily experiences and logical debates?
PN7	Do you feel these are worthwhile activities?
PN8	What do you think the school staff feels about existing procedures?
PN9	What kind of encouragement, if any, is there to support these procedures?
PN10	What kind of encouragement, if any, is there to challenge these procedures?
PN11	What do you think of brainstorming or consulting with other staff members?
PN12	Do you think other staff members feel the same as you?
PN13	Do you feel that your school overall agrees with you?
PN14	What is your school's policy on learning from mistakes?
PN15	What is your school's policy on rethinking (e.g., metacognition) and reviewing?
PN16	What is your school's policy on self-directed improvement?
PN17	Is there any institutional pressure on staff members for improvement?

*Nurturing culture.* The Canadian principal was asked about his focus on supporting others in the school (PN2), and his answer was: “I believe teachers have more power in class, so if we improve them and their ability to teach then we will achieve more positive feedback. So, my principle focus is on improving the teachers” (CP). When asked about learning from mistakes (PN14), he said: “Of course I make mistakes, and I learn from them. I have told, and regularly tell, my staff and teachers about the importance of learning from mistakes.” When asked about his thoughts on brainstorming and group work (PN11), he said “I use brainstorming in decision making, since it is an excellent model. I like it when people are free to suggest and explain their opinions.” He also said: “Group learning is a good method, we have some groups and I would like to develop them. For me I would like to take them separately.” When also asked about his



opinions on the use of metacognitive strategies (after I explained what I meant by metacognition) in the school (PN15), his response was: “These are new topics for our school, but I would like to see them practiced.” Then I asked whether he used those approaches, and he said: “Yes, collaborative learning, critical learning, and metacognition are perfect methods for teaching and learning. I try to use them as best as I can.”

When the Turkish principal was asked about some principles of personal learning (PN1), he said: “This is an educational institution, so we have to regularly and continually learn. The basic principle of personal or individual learning affects the quality of this school.” When asked about methods for group- or team-based learning (PN2), he replied: “Yes, group learning can happen with teachers and students. For instance, teachers could form a group to talk about mathematics, so they can learn math together and discuss their opinions.” I followed up his comment by asking if there is a specific plan for group-based learning, and he said: “It depends on how much time is available, but there are already some groups based on different fields and they are free to improve those groups and learn together.” When I asked him whether brainstorming as a method for group learning was available (PN11), and he answered: “Teachers and students are always ready to come up with their own opinions.” In response to a question about whether learning from mistakes is encouraged in the school (PN14), he said: “Yes, we learn from our mistakes, as well as the mistakes of others.” When I asked him whether the school had any policies or support for methods such as metacognition and collaborative learning (after I explained what I meant by those terms) (PN15), he said: “I don’t have any way or method for re-thinking our approaches. Those topics you mention [e.g., metacognition] are new for our schools.”

As an anecdote, I think it is also important to consider how the Turkish principal positioned and conducted himself given the comments he provided (both here and for later categories). He has a large office with a large, beautiful desk by the entrance door with many chairs around the desk. There was also a piano in his office. On his desk was a large monitor, mentioned elsewhere, and it was clear that he was busy. Even though the school board was the one who introduced me to him, I still waited over an hour before I could interview him. When I entered his office, he tried to explain that his work is serious and he is busy, so he could not be interviewed for long. During the interview, two students entered his office to get his signature. They stood in front of his desk, between some chairs, but he told them aggressively “How many times have I told you, you need to submit those papers on the corner of this desk. So you have to approach this desk from around the chairs.” I thought this behaviour was important to consider given his comments about openness to students, and the students’ comments about him presented later in this chapter.

When the Iranian principal was asked about his focus on supporting other teachers and students in personal growth (PN2), he replied:

Our school is a place for research. Actually, I’m able to do research as a principal in this area. As a case study, for example, some teachers get together and discuss a specific problem they have like a student’s behaviour, material to teach, and so on. This is what we’d call teamwork.

When asked about whether brainstorming was used at all in the school (PN11), he said: “I like it when I hear that someone has done brainstorming, but it’s not a regular method in

our education system.” In response to a question about learning from mistakes (PN14), he commented:

Even if I learn from my mistakes, I don’t like to repeat them again. I would prefer to study and research my options before I act. The way I handle things is through managing all aspects of some activity, but of course I know that sometimes I can’t see all of the related variables. However, I don’t consider this a reason for not controlling my mistakes. Actually, my supervisor has ignored some mistakes once or twice, but after that he officially notifies me about them.

Lastly, when asked about using metacognitive methods (after I explained what I meant by metacognition) in his school (PN15), he said: “No, we don’t use methods like that. Those are new for our school.”

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Table 4.5.

*Interview questions for principals for the Vision for future factor*

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Shorthand	Question
PV1	Does your school have a vision or mission statement?
PV2	What do you think of your school’s vision? How clear is it?
PV3	How committed do you think other staff members are to this vision?
PV4	How well do you think other staff members understand this vision?
PV5	How available is this vision for staff members to read, review, and/or discuss?
PV6	How well do you think this vision could transform other staff members?
PV7	How well do you think this vision could transform students?
PV8	How well does this vision prioritize learning to cope with future uncertainty?
PV9	How well does this vision shape the future of the school?
PV10	How achievable do you think this vision is? Do you think other staff members would agree with you?
PV11	How consistent do you think your activities are with this vision? Do you think other staff members would agree with you?
PV12	In this vision, how important is learning for all institutional levels of your school?

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***Vision for future.*** When asked about whether the school has a clear vision (PV2), the Canadian principal answered: “Yes, our vision is clear. I regularly ask for and collect

my teachers' and staff's opinions about the vision and state of things and send that information to the school board too." When asked about whether this vision is publically available within the school (PV5), again he agreed: "Yes, you can see our school's vision statement in many areas." He also commented that others know about it (PV4): "People have seen that statement, I know that the teachers and staff here know what our vision is." When asked about where the vision comes from and how it can be adjusted (PV8), the principal explained: "Well, we of course receive this vision from the school board. However, we can send our comments, questions, and suggestions to them. So, in this case we have both a top-down and bottom-up system."

When the Turkish principal was asked about the vision for the school (PV1), he pointed to the door of his office and said "There is a plaque on my office wall, and our vision is written on it. This is an old and famous historical school, so we've had a clear vision from a long time ago." The plaque he referred to was on the wall next to the door to his office. When asked about whether others in the school know the vision (PV4), he agreed: "I'm sure this vision is clear for everyone. There's no doubt that the staff and teachers know about it." When asked about how the vision can be changed (PV8), he replied: "This vision is for the past, present, and future. The main focus is the responsibility to teach students." Then I asked him how the vision is being implemented in the school system (PV9), and he said: "All of our activities are based on this vision." When I continued and asked him how the vision is connected to his activities, he said: "I'm too busy to explain all of that. If you can read Turkish I have documents describing it available for you."

When the Iranian principal was asked about the vision for the school (PV1), he said: “Yes, there is a vision for this school. It’s available in my office here, but also the office of the [vice principal].” I followed up his comment by asking whether he thought it would be good to have this vision available in other places in the school, or promote it as a slogan of some kind. He replied, “No, I think all of the staff and teachers already know the vision for our schools.” When I asked him about the students, he shook his head “No, it is the teachers’ responsibility to give that information to the students.” When asked how the teachers should best apply this vision in their work, and how they should share the vision with the students, he answered: “I’m sure our teachers are responsible people. They don’t need my help for that.” When asked whether he thought a vision was important for the school (PV9), he said: “Yes, a vision is an important topic. It is helpful for the teachers, staff, and students so that they can work together to achieve the objectives and goals of this school, and help them to learn better than yesterday. It is a way of measuring our progress.”

Table 4.6.

*Interview questions for principals for the Enhanced learning factor*

Shorthand	Question
PE1	How widely used is mentoring among all institutional levels of your school?
PE2	How systematic do you think other staff members approach their work?
PE3	How systematically do you approach your work?
PE4	What learning resources are available for staff members to improve themselves? (e.g., free learning, e-learning)
PE5	How widely used are these learning resources?
PE6	How regularly do staff members apply “learning in action”?
PE7	Is your school part of an “alliance for learning”? If so, what effect do you think this has on the performance of your school?
PE8	How well does your school cooperate with other organizations?
PE9	How widely used are learning contracts? Are they used to clarify organizational goals?
PE10	What methods, if any, does your school use for detecting and discussing the mental models of staff members?
PE11	Does your school use learning laboratories for staff members? If so, what effect do you think this has on your school’s performance?
PE12	How well do educators support and facilitate learning? Do you feel as though they only teach material?

**Enhanced learning.** When the Canadian principal was asked whether he did any mentoring (PE1), his reply was affirmative: “Yes, I do mentoring. I do that because it’s part of my responsibility as a principal.” When asked about who monitors, follows, and directs the activities of staff and teachers, he said, “Well, in this school, the staff and teachers know what their responsibilities are. So they can monitor and organize their own responsibilities.” When asked about the details of resources available in the school for students and teachers (PE4), he said, “We have a nice computer lab and library. Anyone can go there to study or work. I’m happy to go there and do some research of my own.” I asked whether he did anything personally for the teachers to help them learn, and he explained: “Sometimes I suggest to others a book that I’ve read or studied. Sometimes the teachers and I discuss these books too. But I don’t buy books for others, I’m not sure if they’d like the book.” I also asked him about whether the various groups of people in

the school feel like they are motivated to learn on their own (PE7), and his response was “Yes, I think our school is an alliance of learning. The goal is to improve teachers, staff, and especially students’ motivation to study and learn.”

The Turkish principal was asked about who monitors, follows, and directs the activities of staff and teachers (PE1). In response, he said: “I monitor everyone’s activities in this school” and pointed to a large television monitor on his desk that showed several real-time camera feeds as though by ‘monitoring’ he meant watching the behaviour of others. When asked about whether teachers should do something similar, he said “Teachers can monitor the behaviour of students, and especially their success, using different methods like an oral or written exam. These assessments are good tools for monitoring students.” When further asked whether there were specific programs in the school to help motivate students, he said, “They know this school is different from other schools, and that our method of education is a little different. For example, students are in high school for 5 years with one year they learn German language.” When asked whether there were resources to help teachers improve themselves (PE4), he said “We have a good library and lab, so teachers and students can use that to improve their knowledge.” When asked how much these resources are used (PE5), he said: “Our computer labs are good, and our library is excellent. All of our students, teachers, and even staff can use those.”

The Iranian principal was also asked about who monitors, follows, and directs the activities of staff and teachers (PE1) and he said: “Monitoring the school is one of my duties, so it is me of course.” He also had a large computer monitor, similar to the Turkish principal and used for the same purpose: showing several real-time camera feeds.

I also asked him about managing the behaviour and performance of students (PE2), and whether he did that or if teachers were responsible. He said: “We have an assessment system, which teachers and myself can use, that manages the students. For the final marks, I have to monitor them and make sure they are consistent with our guidelines.” After describing the term “alliance for learning,” I asked whether he would describe his school as being such a thing (PE7). He said: “We don’t use the name ‘alliance for learning,’ but I think we act this way both consciously and unconsciously.” When I asked what he meant by unconsciously doing this, he replied, “We see the behaviour of other people and learn from them how we should, or shouldn’t, behave.” Again, I asked for more elaboration about whether there was any discussion of this topic and said “No, we don’t talk about this normally. We don’t regularly examine other people’s behaviour, but sometimes teachers want to talk about it and so we do.” When asked about what resources the school provides to help students and teachers improve themselves (PE4), he said “We have a good library and computer lab, but our teachers and students don’t regularly use them. The computers, and especially the Internet, are used the most.” I asked whether there was anything to help with reading at this school, and he commented: “Actually, we do have a book reading program here, as well as province- and nation-wide book recital contests<sup>36</sup>.” I asked what these contests were about and he said “The topic is always about the Holy Quran or material from Shahid Motahari.” It is significant that Shahid Motahari was mentioned, since he is considered to have had an important influence on the formation of the Islamic Republic and was a student of Ayatollah

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<sup>36</sup> Such contests are generally question-answer in style. Participants are asked increasingly difficult questions about the material and they need to answer the questions correctly. Usually the questions are multiple choice. Sometimes there is also the need to pronounce the answer correctly, which can be difficult in the case of chanting passages from the Quran in Arabic.



Khomeini while the Shah was in power before the revolution. When he was asked whether his school follows a systems approach (PE3), he wanted some clarification on what ‘systems approach’ meant. After explaining systems and the role of feedback, he said, “I think I use this type of approach, but it’s not a regular model for our school.”

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Table 4.7.

*Interview questions for principals for the Supportive management factor*

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Shorthand	Question
PS1	How well do you accept new approaches?
PS2	How well do your superiors accept new approaches?
PS3	How well do your superiors help the school and staff achieve the school vision?
PS4	How much trust do your superiors have of staff members? How much supervision is required?
PS5	How actively do your superiors support you and other staff members in continual learning and personal growth?
PS6	What effect do you think there will be on school performance if your superiors delegated more authority and responsibility to you? What about to your fellow staff members? Do you think your superiors would agree with your analysis?
PS7	What do you think is your fundamental role in the school? (e.g., to be supportive? to help students grow? To help staff grow? To monitor others? Etc.)
PS8	What do you think is the fundamental role of teachers in the school?
PS9	What do you think is the fundamental role of supervisors and others above you in the education system?
PS10	How much do you reflect on your mental models? Do you feel encouragement to do this? If so, by whom?
PS11	How much do your superiors reflect on their mental models? How much do they encourage you to do the same?
PS12	How much do teachers reflect on their mental models? How much do you encourage them to?
PS13	How much does the administrative staff of your school empower other staff members?
PS14	How much do your superiors encourage you to think about and review their opinions?

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***Supportive management.*** The Canadian principal was asked whether he was open to new ideas from teachers or students about the school (PS1). His reply was “Of course, I’m open and interested in hearing about new approaches. As a PhD student I want to hear the opinions of others and learn from them.” When asked about whether he helps the teachers in their own learning and personal growth (PS6), he said: “I believe all

principals have to help their staff and teachers learn, and sometimes the students too.

Some principals prefer to be formal about this, using a specific way of learning. I try to be both formal and informal.” When asked about his method for decision making, and how it is distributed across the teachers (PS5), he replied “I like delegating some decisions and authority to others. If I have to make a decision in a new area, I prefer making that decision in a group.”

When the Turkish principal was asked about being open to new ideas from teachers and students about the school (PS1), he said, “Yes, my relationship with new ideas is good. Of course, it depends on our school’s vision. It has to align with it since we cannot change the vision of our school.” When asked whether he helps the teachers in their own learning and personal growth (PS6), he said, “No, I’m too busy of a person, but I would like to help my staff and teachers learn and improve their ability to learn.” I followed up his comment by asking if he suggests books to them that he has read, and he replied, “No, I don’t do that, but it’s a good idea.” When asked about his method for decision making and incorporating the opinions of others or delegating to others (PS5), he explained, “I give all of my colleagues an opportunity to come up with their own ideas, and I support this process. However, as I told you, I’m the one responsible.”

When the Iranian principal was asked about his openness to new ideas from teachers and students about the school (PS1), he answered “I like to hear new ideas from our students and teachers, but we have to follow the rules and guidelines from the school board.” I followed up by asking whether this meant a lot of decision-making follows a top-down structure, he answered “Yes, decision making is centralized.” Then I asked him whether he delegated any decision making to teachers (PS5), and he explained: “I am

responsible, so I prefer to make major decisions, but I collect suggestions from others.

So, I make the decisions but I use my knowledge and the knowledge of my colleagues

[when making those decisions].” I asked him a follow up question about whether this

meant teachers should not be making decisions in the school, and he disagreed: “I trust

my colleagues, but since I’m the one who is responsible I have to consider all the sides of

a decision.”

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Table 4.8.

*Interview questions for principals for the Transforming structure factor*

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Shorthand	Question
PT1	How many levels of management does your school have? What about in the whole school district?
PT2	Do you think there are unnecessary levels of management? If so, how well do you think these levels can be removed?
PT3	How responsible are your superiors for developing learning in other staff members?
PT4	How does your school approach teamwork among students? Among staff members?
PT5	What is the definition of responsibility in your school?
PT6	What opinion do staff members have of responsibility? (e.g., is it assessment? their job? regulation of their work?)
PT7	Does your school have many boundaries between teams or groups of people? If so, describe them.
PT8	How well can various staff members share information with each other?
PT9	How well does information from students travel up to the principal? To higher levels of administration in the district?
PT10	How aware are the various teams of their responsibilities towards students?
PT11	What kind of authority is delegated by administrators? How much, if any, authority is delegated?
PT12	Do administrators like this delegation? Do you like it?
PT13	How common is it for staff teams to cooperate? What is the general opinion of this?

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***Transforming structure.*** When the Canadian principal was asked to list the levels of the structure for his school (PT1), he said “We have five levels: principal, vice principal, department head [DH], teachers, and students. I don’t think all these levels are necessary though.” When I asked how he thought these levels interacted with each other (PT7), he explained, “We don’t have boundaries between these groups. All of us can

work together, talk to each other, and share our opinions.” I asked whether this applied to his relationship with students as well (PT9), and he said “Yes, my office door is open for all students and staff. I’m happy to hear from them, it’s an important part of my responsibility.”

The Turkish principal was also asked to list the levels of the structure in his school (PT1), and he said: “Our school has four levels: principal, assistants, teachers, and students. I don’t think we have any unnecessary levels here, but this is a general style for schools.” When asked whether the teachers were able to form teams to help each other learn (PT7), he said “There are teams but they depend on their field of study. So, we have teams for mathematics, physics, general science, and so on. They talk together to help develop each other’s knowledge.” When asked whether the relationship between teachers and principal allow him to delegate some decision-making (PT11), he said, “Again, delegation of authority is a hard topic. I believe the teachers are well experienced, so they know what is expected of them. Sometimes we talk about their objectives, but it’s not a general discussion.”

When the Iranian principal was asked to list the structural levels of his school (PT1), he gave a similar answer as the other principals: “There are four levels for our school: principal, his assistants, teachers, and students. All these levels are necessary for a school.” When I asked whether there were teams that the teachers or students could work in (PT4) he explained:

Teamwork between students would be good, since it’s a more active learning approach as you previously mentioned, but the quality and effectiveness of this strategy depends on the teachers. Team activities can be hard sometimes for

Iranians, especially Iranian students, but I believe we have to improve this and create a better relationship between students and teachers.

When asked whether students could talk to him directly, instead of going through a teacher (PT9), he said, “Yes, students are free to visit. My office is always open for them.” Then, I asked about whether he delegated any authority to his assistants (PT11). He replied, “I like to do that kind of work myself. I’ve defined the job for my assistants very clearly, and I monitor them regularly to make sure things are going well.”

### **Teacher’s Responses**

This section lists responses from all of the teachers to the questions asked of them. As was the case for the principals, the responses will be presented using the INVEST factors. A list of questions that were asked corresponding to each factor is shown in a table before the appropriate sub-section of responses. Again, if no response is given, it is because the participant either chose not to answer the question or indicated that he or she had already answered in a response to a previous question.

Table 4.9.

*Interview questions for teachers for the Inspired learners factor*

Shorthand	Question
TI1	How motivated are you to learn? Why?
TI2	What do you think is the source of your motivation to learn?
TI3	Who do you feel is responsible for your learning? Why do you feel this way?
TI4	What do you think of self-actualization?
TI5	What about group-actualization?
TI6	Do you think self- and group-actualization are necessary things to achieve? Why or why not?
TI7	Do you believe that self-actualization should be a personal objective? Why or why not?
TI8	What experience or value do you gain from mistakes, if any?
TI9	Do you think each person has an opportunity to grow from their experiences, both good and bad? Why or why not?
TI10	What are your thoughts on self-improvement? Do you think this is necessary?
TI11	Do you believe that self-improvement should be a personal objective? Why or why not?
TI12	How motivated are you to learn new things?
TI13	How motivated do you think others in your school are to learn new things?
TI14	What relationship do you think exists between someone's learning and his/her performance?
TI15	What do you think of the status quo of your school?
TI16	Do you think others would agree or disagree with you?

***Inspired learners.*** The Canadian teachers agreed that teachers need to be motivated. For instance, CT2 said in response to question (TI1): “Motivation is an important subject in our work. As a classroom teacher for nearly 13 years I think the first step of motivation is respect for people’s opinion, and that includes respecting your own opinions.” Both of the teachers provided different ideas about how they are to be motivated (question TI2). CT1 said: “I think the basic reason for motivation is curiosity that exists between teachers. My basic strategy is to find a method to teach students and help them be successful.” When asked to elaborate on this, he continued: “I like finding new methods to teach my students and different areas for teaching new approaches” (CT1). On the other hand, CT2 said: “I believe lifelong learning is a perfect method, so I try to learn from all people in all walks of life.” When asked about the value of self- and

group-actualization (TI6), one of the teachers said: “In my opinion, of course self- and group-actualization are necessary, and some teachers want to develop this approach of course but not all of them do” (CT1).

When the Turkish teachers were asked about their motivation for being teachers (TI2), they responded that it had to do with their enjoyment of it. For instance, TT1 said, “I like my job. That is a reason for my motivation.” Likewise (in response to TI2), TT2 said: “I think all of our teachers, staff, and students are highly motivated when it comes to learning. Learning is the objective of all the schools in Turkey.” When asked about self-improvement (TI10), this topic was treated positively but with some limitations:

As a teacher, self-improvement is necessary and we try to learn new methods for teaching. I teach in a highly-ranked school and have to develop my knowledge. I believe learning is an important factor for our job. However, many teachers don't have enough time for other activities, so we just focus on our specific fields [teaching subjects]. (TT1)

Furthermore, both teachers explained their reasons for why they try to engage in some kind of self-improvement (TI12). TT1 said: “As previously mentioned, my motivation for improving my knowledge is two reasons: I like my job, and I am teaching in a good school.” When TT1 was asked if his motivation would drop when changing to a different school, he replied “No, of course not. I believe the system will find a good school for me as long as I am a good teacher.” In contrast, TT2 explained his motivation as follows:

I studied theology at university and I have a sensitive responsibility in this school because almost all of the students and their parents are secular. I have to carefully teach and introduce Islam to them in a logical manner. So, for example, I ask

some questions about the universe then bring in related theological questions like ‘Who created this universe? Why’ To support these ideas, I bring some quotations from the holy Quran and then I continue the discussion.

When asked about group-actualization (TI6), both teachers agreed it was desirable. TT1 said: “I believe group activities and group-actualization are necessary. Even if teachers at this school have group activities, they are related to the teachers’ field. For example, teachers in languages, mathematics, science, and other fields each have their own group.” Likewise, TT2 said: “Yes, I believe using group activities is a great approach. Even in Islam we have been recommended to use this method.”

The teachers in Iran seemed less positive about their fellow teachers (TI13): “Unfortunately, many teachers in Iran believe their responsibility is to teach their course for the allotted time, about one hour, and that is it” (IT1). The interviewed teachers were interested in self-improvement (TI1), but for different reasons than the teachers in the other countries. IT1 said: “I believe the education system of a country is important for developing a society. Hence, that is reason enough for learning and teaching.” In contrast, IT2 said: “My motivation is myself; I am a sports-teacher so I have to improve my knowledge, because students can improve their knowledge through the Internet, computers, and other such sources.” However, this motivation may not be shared by other teachers (TI15). For instance, IT1 said: “I believe nearly all teachers don’t have time and motivation to study other subjects; they just study or review their instruction books.” He further explained that:

I am sorry to say, in Iran teachers have many problems but one of them is a financial problem. So they don’t spend enough time for learning, and definitely



not for group activities. Even now, teachers have to work in two or maybe three jobs, and majority of them believe this job [their job as a teacher] is just something to keep while they grow older because it has a pension and insurance.”

Similarly, IT2 was unsatisfied with the current state of affairs (TI15): “I try to find new materials from different sources, like the Internet, close friends, and so on. I believe that sports-teachers previously played a negative role<sup>37</sup> and for the past ten years [administrators and teachers in] the education system have tried to change this state of affairs” (IT2). When considering how the teachers currently go about their teaching (TI14), IT1 provided the following explanation:

Nearly all of the teachers (myself included) use monologues. In our schools, students don’t study anything before class, and many teachers try to use different strategies to help them learn better. For example, I gave a bit of time in class, almost 10 to 15 minutes, for students to study a new lesson before teaching it, and then I start to teach it. My students are from poor families and many of them have to work when not at school. So, I believe my class is their first and last chance for learning. So, I have to transfer as much as I can in the 90 minutes of my class.

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<sup>37</sup> Some of the sports teachers throughout the country were known for abusing children, and this was not a recent phenomenon. Knowledge of this abuse caused many families to distrust sports teachers. This is the negative role IT2 is referring to, and this abuse was practically ignored until approximately 2007.

Table 4.10.

*Interview questions for teachers for the Nurturing culture factor*

Shorthand	Question
TN1	What are some principles of your school for personal learning?
TN2	What are some principles of group learning?
TN3	What are some principles of personal and group learning at the institutional level?
TN4	What happens if someone tries to go above and beyond expectations? (e.g., are they rewarded, what kind of reward, are they ignored, is there jealousy from colleagues, etc.)
TN5	What support do you think the general climate of your school gives for mutual respect, precision, and trust?
TN6	What are your opinions of learning from daily experiences and logical debates?
TN7	Do you feel these are worthwhile activities?
TN8	What do you think the school staff feels about existing procedures?
TN9	What kind of encouragement, if any, is there to support these procedures?
TN10	What kind of encouragement, if any, is there to challenge these procedures?
TN11	What do you think of brainstorming or consulting with other staff members?
TN12	Do you think other staff members feel the same as you?
TN13	Do you feel that your school overall agrees with you?
TN14	What is your school's policy on learning from mistakes?
TN15	What is your school's policy on rethinking (e.g., metacognition, collaborative learning) and reviewing?
TN16	What is your school's policy on self-directed improvement?
TN17	Is there any institutional pressure on staff members for improvement?

***Nurturing Culture.*** The Canadian teachers indicated that support for individual growth differs between schools (response to question TN1): “Personal learning is important for all teachers and students. However, it depends on the school. We can’t say that all schools have the same principles, since they use diverse methods, but all principles are meant to help students succeed” (CT1). When asked whether group methods of support for teachers were used (TN11), CT1 said: “Yes, we use methods like teamwork and brainstorming, but the teamwork is focused on the subject, such as between mathematic teachers, chemistry teachers, and so on.”

The Turkish teachers mentioned that the quality of their teaching needed to be high (response to TN1): “As I mentioned, this school is highly ranked in the country, so

we have to teach highly-ranked as well” (TT1). However, support for growth seems limited (response to TN2). For instance, TT1 said: “Self-confidence is necessary for this job, and of course all teachers are in a good position for that. Sometimes new teachers have problems with teaching, but after some time they’ll learn some practical teaching methods.” Likewise, and understandably, TT2 said: “My field, Theology, is different from that of other teachers. I’m alone in this school for my topic.” When asked whether group methods were used (TN11), TT1 explained: “Yes, we have group learning activities based on subject. Since I teach mathematics, all discussions in my groups will be about math. However, we use newer school materials, ask questions about our subject, and even sometimes use brainstorming.” Similarly, TT2 said: “I like to use discussions and brainstorming in my classes, and want to develop this further.” When asked about activities such as metacognition (TN15), even when these terms were explained, the teachers indicated that such things were not performed: “No, I don’t think the teachers nor our principal practices metacognition.” (TT1)

The Iranian teachers indicated that there is a lack of support for growth (response to TN1). For instance, IT1 said: “I don’t think this education system has any principles for learning.” A good example of this is provided by IT2:

Since I teach sports, group activities are very important in my class. I try to teach how to form strong teams, and how to keep teams together. In Iran we have a cultural problem, because students don’t understand the purpose of teamwork. Also, students stay in teams when they are weak or lacking; if one person thinks they know enough, even a small part of the needed knowledge, then they prefer to

work alone. For example, in a sports team, like football<sup>38</sup>, strong students want to be the winner and only the result is important for them. However, I give excellent scores to the students who have good teamwork.

Although there were support programs for the teachers (TN11), IT1 seemed to think these programs were lacking:

Teachers can join various in-service training classes and, depending on the subject, teachers can select their preferred topic. However, even in these classes a lot of teachers do not focus on the training itself. Teachers would rather join these classes to receive a certificate, and these certificates are used later to show how ‘good’ of a teacher they are.

Both of the teachers saw problems with the current lack of support (response to TN3), and described this in different ways:

The biggest problem is the diverse number of [high] schools in the Iranian education system. There are many kinds of high schools: public schools, private schools, Nemone Dolati<sup>39</sup>, Nemone Mardoumi<sup>40</sup>, Tizhooshan<sup>41</sup>, Shahed<sup>42</sup>, and so

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<sup>38</sup> In North America, this sport is called soccer.

<sup>39</sup> These are government-run schools without tuition fees. To enrol in these schools, students must pass an entrance exam and have an appropriately high score on the national exam at the end of primary school (the NODET exams, National Organization for Development of Exceptional Talents, which tests mathematics, science, social sciences, Persian literature, and theology).

<sup>40</sup> These schools are like the Nemone Dolati, but require a higher grade on the NODET exam and have a harder entrance exam. The quality of these schools is often considered to be higher than the others.

<sup>41</sup> These schools are like the Nemone Dolati and Mardoumi, but only accept the highest ranked students. These schools also have a harder curriculum, with additional required classes.

<sup>42</sup> These are government run schools for Shahid children: those whose father, mother, or both have died in a way that the government acknowledged as supporting their interests (labeling them as Martyrs), such as in a war or as a result of political assassination.

on. This means nearly all of the students in the public schools (with some variation of neighbourhoods) are from poor families with limited education. (IT1)

Before, and even after, the Islamic revolution most sport teachers did not have higher education in the sport fields. They were just people who played sports, though maybe they had some medals, and their behaviour and the words they used reflected someone who had little education. Practically all families did not respect these teachers, but about 10 years ago the ministry of education has started to change this culture. (IT2)

Before the Islamic revolution students with different levels of skill and knowledge had to stay in the same classes. Thus, a smart student could play an important role in learning through answering questions. When teachers encouraged these smart students, other students would like to copy them. Now though, all students are classified 'smart' and the rich students would prefer to go to private and Tizhooshan schools. This means students who are from poor families have to stay in a public school with similar students. (IT1)

When asked about different methods that could be used (response to TN11), IT2 said: "I try to develop thinking through brainstorming, since I believe this strategy can help students improve their knowledge. Additionally, I want them to share their mistakes to help learn from them." When the teachers were asked about methods for rethinking, like collaborative approaches and metacognition, (question TN15) they answered that these

things were not practiced: “These topics you describe [metacognition, critical analysis, collaborative] are new for our school. We never talk about these topics.” (IT1)

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Table 4.11.

*Interview questions for teachers for the Vision for future factor*

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Shorthand	Question
TV1	Does your school have a vision or mission statement?
TV2	What do you think of your school’s vision? How clear is it?
TV3	How committed do you think other staff members are to this vision?
TV4	How well do you think other staff members understand this vision?
TV5	How available is this vision for staff members to read, review, and/or discuss?
TV6	How well do you think this vision could transform other staff members?
TV7	How well do you think this vision could transform students?
TV8	How well does this vision prioritize learning to cope with future uncertainty?
TV9	How well does this vision shape the future of the school?
TV10	How achievable do you think this vision is? Do you think other staff members would agree with you?
TV11	How consistent do you think your activities are with this vision? Do you think other staff members would agree with you?
TV12	In this vision, how important is learning for all institutional levels of your school?

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***Vision for future.*** When asked about a vision for their school (TV1), CT2 said: “I haven’t seen a vision for my school, so I don’t know what it is.” CT1 also said that he had not seen the vision for their school, and added: “The school board creates a vision for our school, so we can talk with them about it. We can go to the board office and see the vision written down there, or give them suggestions and comments. I haven’t seen that vision displayed in my school though.”

The Turkish teachers, likewise, also had difficulties expressing the vision of their school (response to TV1). TT1 said: “I haven’t seen a clear vision about school.” When I commented to him that the principal says such a vision is in the office on the wall, TT1 replied “Yes, but that is about our school’s history. We know we must teach our students well, because they have difficult competition for being accepted in a high-ranking

university.” It seemed that the teachers also had their own vision for the school (response to TV2):

I think my vision for my teaching work is more important [than the school’s vision] because a majority of these students are from secular families. Hence, I have to teach them religious issues with a language that they can understand. This is my vision, and I think the school’s vision is the same: developing an Islamic approach to education. (TT2)

Likewise, TT1 suggested: “Commitment is an important part of our job. In my opinion, it’s very important. However, it depends on the person.” In terms of whether any vision is discussed with other teachers (TV3), TT1 suggested the answer is no: “As teachers, we never talk about the school’s vision between us, but I think all of them know their responsibilities and that is enough.” Similarly, the vision is not shared with students “We [the teachers] never talk about our school’s vision with the students. We [teachers and students] have unwritten rules about our expectations for each other, and their [students’] future is important for us [teachers].” (TT1)

For the Iranian teachers, they also had difficulty with their school’s vision (response to TV1). For instance, IT2 said, “I have not heard about our school’s vision, but I believe teachers have to teach and assess students very well. I could not find anything about our school’s vision on the Internet either.” Although IT1 agreed with this comment, he/she also added:

I’m sorry to say, in Iran we have different kind of schools and students are in one of three different groups: rich, smart and active, and students from poor families. Rich students prefer to go to the Tizhooshan schools and private schools. Smart

and active students prefer to go to Tizhooshan as their first choice, and the Nemone Dolati schools as their second choice. However, students from poor families usually have to work after school so most of them have to go to public schools. This model is unfortunate, because it means all the good students are in the same class or school, and the struggling students do not have the opportunity to learn from these students as classmates. I listed these schools because I want to say that in Iran we have different types of schools, each of which have different visions for their students.

When asked whether others in the school knew if there was a vision (TV4), IT1 said: “Since this is a public school, we use a hierarchical model. As I previously mentioned, teachers don’t know enough about our vision so we can’t transfer this information to students.”

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Table 4.12.

*Interview questions for teachers for the Enhanced learning factor*

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Shorthand	Question
TE1	How widely used is mentoring among all institutional levels of your school?
TE2	How systematic do you think other staff members approach their work?
TE3	How systematically do you approach your work?
TE4	What learning resources are available for staff members to improve themselves? (e.g., free learning, e-learning)
TE5	How widely used are these learning resources?
TE6	How regularly do staff members apply “learning in action”?
TE7	Is your school part of an “alliance for learning”? If so, what effect do you think this has on the performance of your school?
TE8	How well does your school cooperate with other organizations?
TE9	How widely used are learning contracts? Are they used to clarify organizational goals?
TE10	What methods, if any, does your school use for detecting and discussing the mental models of staff members?
TE11	Does your school use learning laboratories for staff members? If so, what effect do you think this has on your school’s performance?
TE12	How well do educators support and facilitate learning? Do you feel as though they only teach material?

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*Enhanced learning.* When given the descriptions of the various enhanced learning techniques, the Canadian teachers indicated that only some of those techniques were practiced and only some of the time. For instance, CT1 said (in response to TE1): “Our school offers mentoring, and all of the staff here have many sources and opportunities for learning.” Similarly, CT2 said: “In my classes I like learning from my students, and from other staff or teachers. However, this is my approach. Different teachers have different strategies.” For other tools available to students (response to TE4), CT1 said: “Of course our school has a library and various labs, but not all of the students or teachers use them. However, those resources are available to everyone.”

When talking about alliance of learning there was further discussion between CT2 and myself on the topic of a learning organization. He commented: “This idea of a learning organization is a new approach. [...] I can’t say that our school is a learning organization, using your definition, but we can learn from each other.”

When provided with descriptions of mentoring (TE1), the Turkish teachers replied: “Giving advice or training students is part of my job. Actually, I’m not really able to focus on all the needs of my students, but I would like to help them” (TT1); “I train my students both in and outside of class, though it is of course only within the school itself” (TT2). When a systems approach and sharing information was discussed, the teachers generally agreed with it. TT1 said (in response to TE3): “I don’t think all the teachers here use a systems approach, but that is a good method for education”; and, in response to TE2: “Cooperation is good, but not between all of the teachers. We generally work together based on our field or group.” In response to TE2, TT2 said: “I use a systematic approach, and I think other teachers do as well especially since we have a lot

of new teachers.” When TT2 was asked why there were new teachers he said: “We’ve changed almost 98% of the teachers here because they were secular.” When TT2 was asked how they found new teachers, he replied: “I look and find teachers who practice Islam. After my suggestion the principal invites them and we have a small interview.” When asked why he preferred this group of teachers, TT2 replied: “As I explained, most of our students and their families are secular. So, by having Islamic teachers at least they can learn about Islam this way in school.” When asked about other materials (TE4), TT1 said: “We have a good library in this school. All of the teachers, staff, and students are welcome to use it.” Then he added: “However, most of the time our library is empty.”

The Iranian teachers, when asked about mentoring (TE1), said: “In my school, teachers do not use a mentoring method. This is because many students and teachers don’t know what mentoring is<sup>43</sup>, and they have not been taught this either” (IT1). When asked about a systems approach (TE2), IT2 said “No, we don’t have a systematic approach to our education. Teachers have a second job, and many have a third.” When I asked IT2 to elaborate on the lack of systematic approach in his school, and whether that was part of the school board too, he said: “In school board one<sup>44</sup>, we don’t have discussions. In school board three though, some of the teachers developed many good discussions. Sometimes, the likelihood and quality of these discussions depends on people.” When asked about extra materials (TE4), IT1 said: “Yes, knowledge is important for teachers, and one of the ways to develop this is through having a good library and laboratories. Both of them are in our school, but neither of them are used by

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<sup>43</sup> The teachers and students might have known about mentoring informally, but they did not talk about it.

<sup>44</sup> The school boards in Iran do not have names; they are simply given an arbitrary number depending on how the area is divided. The number is not meant to imply importance.

the students or teachers.” Then he added, “Maybe we discover new information or materials, but it’s necessary to have motivation to read them and have enough time.

[Smiling he added] We have neither of these” (IT1). When asked about collaboration (TE8), IT2 said: “No, I don’t think there is collaboration in our school or even monitoring. I don’t see this kind of management in our school at all.” Then he added: “Now though, families noticed the effect of sports in their children’s life and that educated teachers with healthy behaviour helped create this culture.”

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Table 4.13.

*Interview questions for teachers for the Supportive management factor*

Shorthand	Question
TS1	How well do you accept new approaches?
TS2	How well do your superiors accept new approaches?
TS3	How well do your superiors help the school and staff achieve the school vision?
TS4	How much trust do your superiors have of staff members? How much supervision is required?
TS5	How actively do your superiors support you and other staff members in continual learning and personal growth?
TS6	What effect do you think there will be on school performance if your superiors delegated more authority and responsibility to you? What about to your fellow staff members? Do you think your superiors would agree with your analysis?
TS7	What do you think is your fundamental role in the school? (e.g., to be supportive? to help students grow? To help staff grow? To monitor others? Etc.)
TS8	What do you think is the fundamental role of principals in the school?
TS9	What do you think is the fundamental role of supervisors and others above you in the education system?
TS10	How much do you reflect on your mental models? Do you feel encouragement to do this? If so, by whom?
TS11	How much do your superiors reflect on their mental models? How much do they encourage you to do the same?
TS12	How much does the administrative staff of your school empower other staff members?
TS13	How much do your superiors encourage you to think about and review their opinions?

***Supportive management.*** For the Canadian teachers, when asked about their principal’s openness to new ideas (TS2), the teachers said: “Our principal accepts new approaches. He is a positive and energetic individual, who is very supportive of teachers

and staff.” (CT1); “In our meetings he [our administrator] listens to our suggestions and takes note of them” (CT1). When asked about how their principal delegates authority (TS6), the teachers replied: “Although he regularly uses a top-down method for management, he also delegates authority depending on the situation. I know this because I’ve had several opportunities because of him” (CT1); “In my experiences I’ve worked with a couple different administrators. One of them was quite interested in hearing from others and delegating tasks as appropriate, but the rest of them were less interested in that” (CT2). In addition to his previous comment about question TS6, CT1 added: “In my class I try to adapt my methods to the students, because I see they’re at different levels of skills.” When asked about how well they reflect on their mental models (question TS10), CT1 said: “I prefer to follow our school’s educational method. Bringing in new opinions is sometimes hard, and students are not open to that method.”

For the Turkish teachers, when asked about their openness to new ideas (TS1), their comments were generally positive. TT1 said: “Our teachers are interested in hearing new ideas, and like to try out new approaches.” When TT1 was asked about whether this was true for students, his response was: “Absolutely, we would like to hear ideas and opinions from students.” Similarly (in response to TS1), TT2 said: “Because my course is about Islamic approaches to life, in all of my classes I have to try and encourage discussion among students and encourage them to participate in these discussions.” When asked about trust among staff (TS3), TT1 said, “Trust is an important factor for our job. Teachers and staff know their responsibilities and they try to do them.” When asked if, because teachers know their responsibility, the principal has no need to monitor and follow up with teachers, TT1 replied: “Well, perhaps. He monitors everything anyway, so

maybe that is his responsibility.” TT1 then added: “However, there is information our principal does not talk about, such as our school’s vision.” TT2 gave a similar response (to question TS3) as TT1, by saying: “The teachers and staff in this school know their responsibilities and what is expected of them, but our principal also monitors us and deals with any conflicts or problems that arise.” When asked about the openness of superiors to new ideas (TS2), TT2 said:

In my opinion, our principal is a positive and open-minded person. He even receives my suggestions about candidates for new teachers to hire. When he’s going to have a meeting, he first asks for opinions and information from the teachers and staff then uses that for his discussions.

When asked about how well tasks were delegated (TS6), TT1 said: “Delegation of authority is a touchy subject. Our school’s principal prefers to be the first one to handle major issues.” The fact that their principal had a television screen that showed various camera feeds from across the school was mentioned to TT1, and he was asked whether the principal was also monitoring in-class activities and wanted to handle issues there. TT1 replied: “No, of course not.” When asked about how they reflect upon their own mental models (TS10) they replied:

I like to reflect on the mental models I have, but this is hard to do. I don’t even have enough time for personal activities and hobbies, or visiting with friends, because of how much time my classes, family and especially my children require. My Turkish culture encourages me to focus on work and family, so I don’t have much time to think about my mental models. (TT1)

When the Iranian teachers were asked about the openness of their principal to new ideas (TS2), their responses were generally negative. IT1 said:

As we previously talked about, our education system follows a very hierarchical system. Any new ideas we get are supposed to be from a higher level. So, our principal is not open to new ideas from his staff or other teachers because that's what is expected of him: to follow the role given to him.

When asked if this meant the principal was not trusting of his staff (TS4), IT1 replied:

This is an important subject, but we [the teachers] know he has to follow the role he's given. His trust for us varies depending on the activity, and of course the administrators who are religious have their own group of preferred teachers.

When asked how much the staff support each other (TS5), again IT1 continue with a comment about the role of a hierarchical system:

I don't think administrators in general help other teachers and staff to improve their skills or knowledge, but this is because they aren't told to do so by the higher levels of the education system. As an example, one administrator punished a student by kicking him so hard that he was knocked on the ground and his stomach and testicles hurt. The parents of this student took the administrator to court, but it just meant the administrator had to pay a fine and he remained a school administrator. Do you think this kind of person can support other teachers to grow?

Likewise (in response to TS2), IT2 said "No, new ideas in our education system have very few fans or supporters." To elaborate on this point, IT2 continued: "All of the staff here think that, because they know their responsibilities and what is expected of them, it's

not necessary to hear the opinions of others. We just look to the curriculum for ideas and information.” Given the comments on poor administration, I asked about the policies for hiring and assigning principals to schools. IT1 explained that it was corrupt and/or incompetent:

It seems that our educational policies for administration selection is unrelated to candidates’ efficiency at their job or their effectiveness. In other words, it doesn’t matter their skill at the job or whether someone deserves a promotion to that role. What matters is the relationship between someone and the person assigning them the role of principal. Many principals I have known or heard about know nothing about organizational behaviours, so they quickly create a hostile atmosphere between the principal, staff, and teachers. Once this situation arises, the school board has to remove him, but that just means he is moved to another school and becomes the principal there.

Since there were also comments about problems with handling discipline of students, IT1 was asked whether these were policy-related problems and not just issues with the administrator(s). His response was:

Discipline is poorly handled in our education system. Most of the time, students and their parents want to solve these kinds of problems with very informal methods. For example, one time a teacher punished a student by hitting him. The student’s father later came to the school and attacked the teacher, even telling his child ‘go ahead and beat the teacher like he beat you.’ This is illogical; we need rules that make more sense than this.

When asked about how well they reflect on their mental models (question TS10), IT1 said: “In Iran, it is too hard for a teacher to discuss his mental model. The government is sensitive about these issues, and our government prefers to design a model for all teachers.”

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Table 4.14.

*Interview questions for teachers for the Transforming structure factor*

Shorthand	Question
TT1	How many levels of management does your school have? What about in the whole school district?
TT2	Do you think there are unnecessary levels of management? If so, how well do you think these levels can be removed?
TT3	How responsible are your superiors for developing learning in other staff members?
TT4	How does your school approach teamwork among students? Among staff members?
TT5	What is the definition of responsibility in your school?
TT6	What opinion do staff members have of responsibility? (e.g., is it assessment? their job? regulation of their work?)
TT7	Does your school have many boundaries between teams or groups of people? If so, describe them.
TT8	How well can various staff members share information with each other?
TT9	How well does information from students travel up to the principal? To higher levels of administration in the district?
TT10	How aware are the various teams of their responsibilities towards students?
TT11	What kind of authority is delegated by administrators? How much, if any, authority is delegated?
TT12	Do administrators like this delegation? Do you like it?
TT13	How common is it for staff teams to cooperate? What is the general opinion of this?

***Transforming structure.*** When the Canadian teachers were asked to describe the structure of their schools (TT1), CT1 indicated: “We have four levels in our school: from the principal, down to the vice-principals, and then staff and teachers, and students. I think all these level are necessary.” When asked about distribution of decision making, particularly with respect to Tannenbaum and Schmidt’s theory (TT11), the teachers gave similar responses: “Decision making is a difficult issue to analyze. In my school, based on your description, our principal uses a top-down approach and I think it would be



around level five [for Tannenbaum and Schmidt's theory]." (CT1); "As I previously mentioned, I don't think we have a democratic style of administration. Given your description, is there a level between four and five? I think that's where our school fits" (CT2).

When the Turkish teachers were asked to describe the structure of their school (question TT1), they gave a description similar to the Canadian teachers: "In this school we have four levels: the principal, his vice-presidents, the staff and teachers, and then the students." (TT1) When asked whether the principal encourages teachers to improve themselves (question TT3), TT1 said: "It's not necessary to tell us that we have to learn new things, we [the teachers] already know this." When asked whether the principal could give opportunities for improvement (a rewording of question TT3), TT1 continued: "Actually, in this school we have library with many books. So, we can use those to improve our understanding." I asked TT1 for more information, by asking whether the principal, for instance, buys a book, reads it, and then suggests it to others or if he gives books to teachers as a gift for some reason (as an example for question TT3). TT1 replied, "we don't do those things." When asked whether the teachers try to help the students improve, other than just teaching them the necessary content (question TT4), TT1 answered:

I'm not sure about others but as a teacher, or as part of a group of teachers for the same subject, I want to recognize my students' needs and try to solve them. Our responsibility is to give up-to-date information to students and then evaluate their learning with different kinds of methods, like an oral exam, diverse assignments, and written exams. However, as a group, our responsibility is to find new subjects

and teach new information that help students to increase their knowledge so that they can be accepted into universities with a high rank; we know they will have difficult tests and competition from other students in the near future.

When asked whether the principal or teachers delegate decision making (question TT11), TT1 answered: “I prefer to see all of the expected roles and responsibilities of members of this school known and followed. Our principal agrees, and likes to make sure we have clear responsibilities.” When asked whether anyone can talk to the principal, or members of the school can only talk to the people directly above them in the hierarchy (specific version of TT8), TT1 said: “Of course, students are free to visit their principal, and talk with him about any subject.”

For the Iranian teachers, when asked about the structure of their school (question TT1), they provided the same response as the others: “We have four levels in our school: principal, vice-principals, teachers and other employees, and students. I think this is acceptable, and our system doesn’t have unnecessary levels within the school” (IT2). When asked about how the principal encourages the teachers to improve (question TT3), IT1 replied that this did not happen:

No, our principal never encourages or asks us to learn new things. I think we talked about this already; the principals have to follow the rules given to them from Tehran [Iran’s capital]. Because of how centralized the education system is, principals, teachers, other staff and even students are limited in what they can do and how they can develop regarding their responsibilities.

When asked about how well the teachers work in a team (TT7), both teachers explained that teams for staff are effectively non-existent. IT1 explained:

We don't have a formal team in our school for exploring good method(s) for learning, nor even for sharing opinions or findings. Sometimes though, two or three teachers get together as an informal group and discuss their teaching method and other subjects.

Similarly, IT2 said: "Teamwork exists in our education system symbolically, but we are very unsuccessful in how it is applied."

**Students' Responses**

Like the sections for teacher and principal responses, the questions for the students follow the six INVEST factors and the specific questions asked are listed in a table before the responses.

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Table 4.15.

*Interview questions for students for the Inspired learners factor*

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Shorthand	Question
SI1	How motivated are you to learn? Why?
SI2	What do you think is the source of your motivation to learn?
SI3	Who do you feel is responsible for your learning? Why do you feel this way?
SI4	What do you think of self-actualization?
SI5	What about group-actualization?
SI6	Do you think self- and group-actualization are necessary things to achieve? Why or why not?
SI7	Do you believe that self-actualization should be a personal objective? Why or why not?
SI8	What experience or value do you gain from mistakes, if any?
SI9	Do you think each person has an opportunity to grow from their experiences, both good and bad? Why or why not?
SI10	What are your thoughts on self-improvement? Do you think this is necessary?
SI11	Do you believe that self-improvement should be a personal objective? Why or why not?
SI12	How motivated are you to learn new things?
SI13	How motivated do you think other students in your school are to learn new things?
SI14	How motivated do you think the teachers in your school are to learn new things?
SI15	What relationship do you think exists between someone's learning and his/her performance?
SI16	What do you think of the status quo of your school?
SI17	Do you think others would agree or disagree with you?

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*Inspired Learners.* When considering the Canadian students, they were both motivated in school by a desire to get to university (response to SI1). For example, CS1 said: “My motivation for learning is a degree from university. I would like to be a biologist; hence, I have to study hard. ... I believe all students have opportunities to grow [in experience] and learn from other students.” Similarly, CS2 said “My motivation for learning is having a future with a stable job, so I would like to go to university. University is important to me because I believe I can find a job with a university degree.” When CS2 was asked for more detail, he replied with “I would like to get a Master's degree. But I don't think I need a PhD actually. It would depend on the situation.” Personal effort was an important source of motivation (SI2): “Learning in my school depends on ourselves” (CS1). At the same time, learning from mistakes was not seen in a positive light (response to SI8): “we do not have time to make mistakes because I have to go to university and I try to control myself in all aspects” (CS2). In terms of motivation from the school though (SI3), CS1 described a policy that was undesirable:

In our school learning means studying our courses very well. ... We have a punishment system where, if we didn't do our homework well, we are forced to stay at school in our class for one hour by our teacher. During this time we have to work on our assignments.

Similarly, CS1 stated that the workload required significant time: “I don't have time for studying materials that aren't related to my school's subjects.” In terms of the teachers though (SI16), CS1 said: “My school has some good teachers and a safe atmosphere. Of course, we have some bad teachers too.”

Like the Canadian students, the Turkish students were motivated by a desire for career-related education (response to SI1): “I would like to go to medical school. So, I concentrate on my courses and just study my schoolbooks. This goal of entering medical school is encouraging for me” (TS1). The students also agreed that their own effort was important for learning (response to SI3). For example, TS1 said: “I’m responsible for learning new knowledge and skills.” Both students also thought highly of their school (SI16), because of its reputation. TS1 said: “My school ranking is perfect because it’s between three high-ranking schools in Turkey. Therefore, we have to study, study, study.” Likewise, TS2 said: “My school is the best school in Turkey! I entered here with a good situation since many students’ dream to come here. I’m a lucky person to be here.” When discussing the motivation in terms of course activities (response to SI6), TS1 said:

Our group activities depend on our teacher and the course. For example, in our German language class we have an exchange program: we spend one week in Germany with a German family, and their kids spend one week with us. Although the students’ families are responsible for helping with the exchange, the arrangement is with the students. I found the German families to be very polite, perhaps because they know their children will be in our house in the near future [she laughs]. I didn’t hear about students being harmed, abused, or involved with indecent behaviour; probably because their children will visit our families too, so we all want to get along nicely. They help us to learn the German language very well and we (even our families) have the same responsibility for Turkish. Even

with Skype, WhatsApp, and other software we regularly talk to help learning these languages.

Despite the individual desire though, it is clear that family involvement is also strong at this school. In addition to the previous example with the exchange program, TS1 mentioned: "I would like to learn more by myself but my parents, and my brother who is a medical student, help and guide me with my school work." When asked about learning from mistakes (SI8), the students indicated it was difficult since mistakes were unacceptable: "We don't have time to make mistakes. Our school doesn't allow it, and my parents don't allow it either. We have to do what is expected of us by our school and parents." (TS1)

At the Iranian school, some of the comments were similar. For example, the students were still motivated by a career and university but were less optimistic (response for SI1): "I'm motivated by goals for my future, like a university degree and a good job, but I know that even with a university degree we [students] will not be able to find job." In talking about the role of their teachers (one answer to SI16), the students were somewhat pessimistic: "Many teachers in our school don't teach very well, and they invite students for private tutoring classes that they run on the side" (IS1), "Our teachers teach well, but only one encourages us with a positive attitude and kind behaviour [for all the students]" (IS2). However, it seems that some of the teachers are trying to help the students: "Some teachers want to design a future for us, with and without a university degree involved, so, that can be motivating" (IS1). These students felt the teachers were not particularly interested in improving (response to SI14): "Our teachers teach a course and we have practice by doing assignments. We never enter a class knowing what the

topic will be” (IS1). When asked about learning from mistakes (SI15), the students felt that making mistakes was unacceptable: “Sometimes we have an opportunity to learn from our mistakes, but we often lose marks this way. So, the cost of making mistakes is usually high. My family, especially my mom, doesn’t want me to make mistakes.” (IS1); “I’m in high school, with two years left to graduate. I can’t afford to make mistakes, that’s what I’ve been told.” (IS2). Another comment from IS1 also indicates that students were only somewhat inspired by their school work (response to SI13): “Although students practice the schoolwork each day, we [this student and his group of friends] have learned to study well during the exam period.” Further comments from IS1 indicate the negative attitude some students have of their school: “We talk between our friends that school is the same as prison, and we have to stay there for six hours per day with some breathing time between each class like a prisoner would get.” A longer comment from IS1 also shows the relationship between what inspires students to learn and technology:

Families have to control children during the exam period. This time my mom took my cellphone so I would stay focused on school, but I had no cellphone for 6 months! I got it back last month. It’s normal for adolescents to have cellphones, even in some classes we play with our phones. The teachers usually take them and send them to the principal’s office, so our parents have to come to school and get our cellphones back. But I believe we learn more from our cellphones than from teachers. I think it’s a good method for self-improvement. I believe student can improve themselves by using the Internet, computers, and cellphones.

To get a sense of the school life that these students experience (another response to SI16), here is a comment from IS2 describing his school:

I am studying in a “Nomoune Dolati,” a good place for public school students.

Students in these schools have good scores and these students are selected among other students. Our courses are the same as other schools though and my field is human science [Humanities]. In this field we study courses like Arabic language, English language, and Persian language [all 3 languages], history of Iran and the world, historical literature, Philosophy and dialectics, psychology, sociology, religious approaches, geography, and so on.

Although IS1 and IS2 went to the same school, they had different areas of specialization.

The type of school they attend (Nomoune Dolati) is free to attend, like all public schools, but requires passing an entrance exam. Note also that these students are from a Turkish background, and their school involves learning 3 languages but not their mother tongue.

This has been a consistent problem with that area of Iran (see Tabrizi, 2013).

Furthermore, IS2 mentioned other aspects of their school life (another response to SI16):

“Since all [male] students in Iran have to pass a course about military readiness, we have to go to a shooting range regularly;” “We go to a camp too sometimes but we do not sleep there;” and “A clergyman comes to our school once per week and students can ask them questions about religion.”



Table 4.16.

*Interview questions for students for the Nurturing culture factor*

Shorthand	Question
SN1	What are some principles of your school for personal learning?
SN2	What are some principles of group learning?
SN3	What happens if you, or other students, try to go above and beyond expectations? (e.g., are they rewarded, what kind of reward, are they ignored, is there jealousy from colleagues, etc.)
SN4	What support do you think the general climate of your school gives for mutual respect, precision, and trust?
SN5	What are your opinions of learning from daily experiences and logical debates?
SN6	Do you feel these are worthwhile activities?
SN7	What do you think of brainstorming or consulting with other students?
SN8	Do you think other students feel the same as you?
SN9	What do you think of brainstorming or consulting with teachers?
SN10	Do you think the teachers feel the same as you?
SN11	What is your school's policy, if any, on learning from mistakes?
SN12	What is your school's policy, if any, on rethinking (e.g., metacognition) and reviewing?
SN13	What is your school's policy, if any, on self-directed improvement?

***Nurturing Culture.*** In all three countries students had not heard terms like organizational learning, brainstorming, metacognition or collaborative learning. Since some of the questions were about those topics, I described them for the students.

The Canadian students, when asked about organizational or collaborative learning (SN2), replied that these were not practiced in their schools. CS1 said: “We don’t have group or organizational learning. Actually, I prefer to study alone. Sometimes we have group activities in our courses, but those are just about the topics in that course.” Similarly, CS2 said: “We are free to talk about our opinions in class, but our teachers didn’t talk about collaborative learning, metacognition, or critical learning, and anything like that.” In terms of brainstorming techniques (SN9), CS1 suggests that it was mainly sharing opinions: “We don’t have any opportunity or time to find a new method for solving our assignments, like our mathematics assignment. Our teachers don’t use that

brainstorming technique, but we are free to talk about our opinion.” When asked about learning from mistakes (SN11), CS1 laughed and said, “Yes, I learn from my mistakes but I don’t like to do it. My mom says that I am a perfectionist.” And when metacognition was described for CS1 (for question SN12), the response was “This sounds like a good method for learning but my teachers didn’t talk about it.”

The Turkish students gave similar responses in terms of metacognition and brainstorming methods. For instance, when the terms were explained (for question SN12) TS2 said “We don’t have those in our classes.” However, the students gave some extra comments that indicate how they can sometimes share their opinions (for question SN9). TS1 explained:

Teaching is very important here, because if we get low marks then we can’t stay in this school. Our environment is safe and I have good classmates. We have to follow this school’s expectations for us and we never talk about it, even in terms of teachers.

TS1 was asked to clarify, whether the teachers behave strangely or abusively. The response was: “No, of course nothing like that, but I don’t like to discuss with my teachers in class if there is a problem. I prefer to talk to him/her alone.” TS1 was asked to elaborate why she preferred to talk with teachers alone, and she answered:

For example, many students don’t practice any religion in their family and our “religious insight teacher” started a discussion about religious behaviour. One of the students disagreed with him, but I noticed that it’s not necessary to be serious about these topics; that course was the same as other courses, I just have to pass it

[the student looked away at this point, as if checking to make sure no one else was around to hear her comment].

Similarly (another response for SN9), TS2 said, “I don’t like to talk about my opinions in class; my duty is learning, hence, I am serious about it.” When asked about learning from mistakes (SN11), TS2 said: “As students, it’s acceptable for us to make mistakes but I myself would like to act very well. My mom calls me a perfectionist.”

The Iranian students responded the same when terms like metacognition were explained (question SN12): “Metacognition and such are not methods which our school uses” (IS2). When collaborative learning was described (question SN2), IS1 said: “We don’t have group activities in every class, and of course the school principal is 100% against it. Some of our teachers are positive about it, but my classes we’ve only had them once or twice.” Similarly, when brainstorming was described (SN9), IS1 said, “That can be a good method but we don’t use it. On the other hand, in our society there are some things we can’t share our opinions about and other times we cannot talk about our opinions at all.” When asked to explain what methods were popular (SN11), IS1 replied with “Well, experience is a good method for learning but it’s not easy” and IS2 said “Our school’s policy, like other schools, is to teach subjects that are important for the Konkour [the university entrance exams].”

Table 4.17.

*Interview questions for students for the Vision for future factor*

Shorthand	Question
SV1	Does your school have a vision or mission statement? If so, what do you think of it? How clear is it?
SV2	How well do you think other students understand this vision? What about the teachers?
SV3	How committed are you to this vision? What about other students?
SV4	How committed do you think the teachers and staff are to this vision?
SV5	How available is this vision for students to read, review, and/or discuss?
SV6	How well do you think this vision could transform students? What about transforming the teachers?
SV7	How well does this vision prioritize learning to cope with future uncertainty?
SV8	How well does this vision shape the future of the school?
SV9	How achievable do you think this vision is? Do you think other students would agree with you? What about the teachers, would they agree?
SV10	How consistent do you think your activities are with this vision? Do you think your teachers would agree with you?
SV11	In this vision, how important is learning for all institutional levels of your school?

***Vision for the Future.*** The Canadian students did not know if their school had a vision (question SV1). CS1 said:

Vision for my school? I don't know. But my vision is University. We don't have a prevalent slogan in our school, and my teachers never mentioned one. I certainly believe other students, my classmates, have no idea about our school's vision. We defined some objectives for ourselves, and sometimes we discuss those, but that's all.

Similarly, CS2 said, "Honestly, I don't know my school's vision and mission, but I can guess it. Its mission is to help students to understand the knowledge in our text books."

For the Turkish students, the comments were similar. TS1 explained (in response to SV1): "Even if I didn't see or read about our school's vision, I believe I can study well and continue my education in upper levels. I think other students justify this option for themselves. I have some close friends and we discuss about our future, but this vision

belongs to us.” Likewise, TS2 said: “Some teachers informally talk about our future, but it’s not a vision. That is just something to motivate us to study harder.” The principal of this school, as will be shown later, believes the school does have a vision and that it is written on a board in the office. When I mentioned this to both of the students, they did not think it was the school’s vision. TS2 said “Yes, we studied that, but it’s just about the history of this school.”

Similarly, for the Iranian students, they did not know if their school had a vision (question SV1). IS2 said: “I haven’t seen or heard about my school’s vision. I don’t think other students know about it either. But I know the number of students who pass the Konkour exam is important for our teachers and principal.” IS1 gave a similar answer:

Our teachers give us different assignments and one of them is an oral exam. We stand in front of other students in class, and the teachers ask us questions that we have to answer, but we have to give answers that our teachers want to hear. We learned we have to follow what the teachers’ want 100% for this type of exam, and then we’ll be able to pass the Konkour. Perhaps that can be the vision for our school, principal, his vice-principal, the staff, and our teachers [the student said this last sentence sarcastically].

Table 4.18.

*Interview questions for students for the Enhanced learning factor*

Shorthand	Question
SE1	How widely used is mentoring in your school?
SE2	How systematically do you approach your work?
SE3	How systematic do you think other students approach their work?
SE4	How systematic do you think teachers approach their work?
SE5	What additional learning resources are available for students to improve themselves? (e.g., free learning, e-learning) How widely used are these learning resources?
SE6	How regularly do your teachers use “learning in action” for students?
SE7	How well does your school cooperate with other organizations?
SE8	What methods, if any, does your school use for detecting and discussing the mental models of students?
SE9	How well do your teachers support and facilitate learning? Do you feel as though they only teach material?

**Enhanced learning.** For the questions in this section, I again had to explain several terms but this also helped to ensure all the students understood the questions. The Canadian students said that only some of the enhanced learning tools were used in their school. For instance, in response to question SE1, CS1 said, “I believe my school doesn’t use a mentoring system because the number of students in each class is important. Depending on the class we have approximately between 25 and 28, sometimes as much as 30 students.” In response to question SE5, CS2 explained: “We don’t have learning labs, but teachers use videos and computers in our classes.” Similarly (question SE5), CS1 said: “We have a library with many books on its shelves, but we don’t have time to read them. We go to library only near exam time.” Further explaining the learning methods used (question SE4), CS1 said: “Our school simply uses a traditional model. The teachers teach a course and we have to learn the material. Our school’s responsibility is to graduate successful students who go to university.” Similarly, CS2 said: “My teachers use a push system of sending us information. They don’t use a pull one.”

The Turkish students did not have much to say about the technology and learning materials of their school (question SE5). TS2 said: “Our school has a wonderful library, but many of the subjects are old. Students prefer to study in their home, but if there are group activities then we work in the library.” When asked about how the teachers work with students (question SE4), TS2 said:

Our teachers have time for us after class, but I prefer to solve my problems [for school assignments] by myself. For some minor issues I went to a teacher’s office. I prefer to talk with my family about my goals though, because I believe they can help me better than anyone else, even my teachers. My teachers just teach courses, even though I believe they want to teach us well.

Similarly (for question SE4), TS1 said: “I believe our teachers are like everyone else, but they are just a little more religious [smiling]. They teach courses and we have to submit our assignments on time.” This student then continued, “But students are different. We have a lot of competition between us, so we have to study hard every day and every time.”

For the Iranian students, a good summary of advanced learning techniques can be seen from IS1’s comment (response to question SE1): “In my school, mentoring, a systems approach, or other methods like that are not practiced.” Similar to the Canadian students, IS2 indicated that lack of time for students might restrict the possibility for mentoring (response to question SE1):

Any enhanced learning that happens depends on students, because our teachers are teaching all of the students. They don’t have enough time to work with each person. Our classes have roughly 30 students, and for a 90-minute class that gives

only three minutes for each person! So, we have to enhance our learning outside of class.

For how the students might try to enhance their learning on their own (question SE5), IS1 explained: “I have a strategy for handling my courses. I pay attention in class and learn there, and then I continue studying the material outside of class. My parents often help me with studying at home.” Likewise, IS2 mentioned a library and how it was used (response to SE5): “We have a library that the students elect a librarian for. I don’t like going there, and other students are like me. However, during exams we have to go there because it’s the best place to study together.”

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Table 4.19.

*Interview questions for students for the Supportive management factor*

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Shorthand	Question
SS1	How well do teachers and administrators accept new approaches?
SS2	How well do teachers and administrators help the school achieve the school vision?
SS3	How much trust do teachers and administrators have of students? How much supervision is required of you and other students?
SS4	How actively do your teachers support you and other students in continual learning and personal growth? What about administrators?
SS5	What effect do you think there will be on school performance if teachers delegated more authority and responsibility to you? What about to your fellow students? Do you think your teachers would agree with your analysis?
SS6	What do you think is your fundamental role in the school?
SS7	What do you think is the fundamental role of teachers in the school? What about the principal and other administrators?
SS8	How much does the administrative staff of your school empower students?
SS9	How much do your teachers encourage you to think about and review their opinions?

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***Supportive management.*** When the Canadian students were asked about their relationships with teachers (question SS4), CS1 said that:

It depends on the teacher. Some of my teachers are positive, encouraging, and supportive and they like to hear our opinions and ideas. Most of them are just focused on teaching the stuff we need to know for class. I know I haven’t received



much support from my teachers. Since I'm a good student they like me, but they're usually only interested in keeping us quiet and paying attention in class and testing our knowledge with exams.

These comments were echoed by CS2, who said: "Our teacher's main role in class is to teach us and test us with exams." When asked about the school administration (question SS3), the response from the students was similar: "Our principal likes monitoring what's going on the whole time. Usually she walks around the school, looks to see what people are doing, and such. We think she's too serious, but that's all we've ever seen" (CS2); "I think our teachers' committee is focused only on their own field. So, the math teachers get together in their group and talk about how to teach us math better" (CS1).

The Turkish students had similar comments to give. For instance (in response to question SS4), TS1 said: "Students are responsible for studying, and teachers are there to make us learn through assignments, exams, and oral evaluations." Likewise (for question SS4), TS2 said: "When I talk with my mom and dad about school, I notice that the schooling is the same. The only difference is that I have to study for one more year, and it's for learning German." In terms of how the teachers include students in more detailed discussions (question SS5), TS1 said that:

We [students] aren't involved in any decision-making, the teachers don't involve us in that. Like I said before, our school doesn't use metacognition, collaborative learning, or any of those. At the same time, I don't like to give suggestions for my school because some of our teachers don't want to hear about new ideas.

Despite these comments, TS2 suggested that not all teachers are like this (another response for SS5): "Our German language classes are different, we have more support."

However, this was contrasted with the comment: “This is one of the best schools in Turkey and we have to study really hard. Sometimes this helps me improve, so that could be considered supportive, but I honestly don’t have time for anything else” (TS2).

For the Iranian students there were some similar observations. For instance (in response to question SS4), IS1 said: “Our education system is quite traditional. It’s almost the same as for my parents, and even my grandparents: teachers teach the material and students practice it and do assignments.” In contrast though, IS2 said, “I think my parents had a better situation for learning. They could find good books on the black market. We have the Internet and cellphones, but students just memorize the material.” In terms of whether teachers are open to new ideas (question SS1), IS1 seems to think it is possible: “I think our teachers are interested in new ideas and want to hear from us, but the students aren’t interested in that. Maybe the students never learned about this.”

Related to this (another response to SS1), IS2 suggested:

Since my area of study is the human sciences, logically we could talk about anything and I think my teachers would be happy to do that. But, many of the students enter this field because they can’t join another field like math or science.

However, as an alternative, IS2 only said: “I think the ministry of education should change this policy and give more attention to this field.”

Table 4.20.

*Interview questions for students for the Transforming structure factor*

Shorthand	Question
ST1	How many levels of administration do you think your school has? What about in the whole school district?
ST2	Do you think there are unnecessary levels of administration? Why or why not?
ST3	How does your school approach teamwork among students?
ST4	What is the definition of responsibility in your school? What do other students think about this definition?
ST5	Does your school have many boundaries between people? If so, describe them.
ST6	How well do you get information about what is happening in your school?
ST7	How well can you give information about your school (e.g., your opinion on something that needs improvement) to your teacher? to your principal?
ST8	Do you think the administration of your school cares about your feedback? Why?
ST9	How common is it for teachers to cooperate?

***Transforming structure.*** For the Canadian students, they had limited knowledge about their school's structure and administration (question ST1). CS1 said: "I think we have four levels of administration: a principal, his vp [vice-principal], teachers and then the students." When asked if any of these were unnecessary (question ST2), CS1 said, "These levels are ok." When asked about how the school structure can help improve students (question ST4), CS2 said, "The responsibilities for my school include monitoring students, to see if we're present or absent, and teaching. My teachers never talk about improving our behaviour, we just learn new ideas and some skills." When asked about engaging with the administration (question ST7), CS1 replied "Yeah, we can visit any of those people, but I don't want to transfer my problems to the principal." When CS1 was asked to elaborate, all he said was: "New or bad teachers are a common problem for us, but I don't like to talk with our school principal about it. I think she just has to tolerate them."

The Turkish students described their school in a similar way (question ST1): "In our school I think we have four levels, with the students of course. That'd be the

principal, his vice-presidents, the teachers, and then us” (TS1). When asked about whether this structure seemed good (question ST2), TS1 agreed: “Yes, the structure’s fine. Our school doesn’t have unnecessary people, though the learning part starts with the teachers and ends with us.” When asked about whether the different levels of this structure offer support (question ST7), the students were somewhat negative about this topic. TS2 said: “Students are free to visit the principal’s office and talk with him whenever, but I prefer not to do that. I think I can solve my own problems, without using his method.” Similarly, TS1 said:

I don’t like to have general discussions with my teachers in class. [This student referred to an example of a classmate having a discussion with the religion teacher.] I think some of the teachers don’t like to have discussions, and many of them don’t seem open to our opinions anyway.

When asked about the responsibility that the various people in the school have (question ST4), TS1 replied: “In my school, there are two responsibilities: teaching and learning. The teachers’ responsibility is to teach us material, and the students have to study and learn it.”

When the Iranian students were asked about the structure of their school (question ST1), they replied in the same way as the other students: “In my school there are four such levels: the principal, his vice-presidents, the teachers, and students” (IS2). When asked about how well these levels work together (question ST2), IS1 replied:

I don’t have enough information about the different levels of administration in our school. However, I don’t think there’s much control over our teachers’ activities in class. For example, for the last two years our mathematics teacher hasn’t taught

us well at all. To get a better understanding of the material, my parents have to pay him money so we can attend his private lectures outside of school.

When asked about the relationship between the principal and students (question ST7), IS1 said: “Our principal is a supportive, encouraging, and open-minded person. His goal is to increase the number of students who can pass the Konkour exams.” However, IS2 commented: “Students don’t like going to the principal’s office. However, his door is open for us whenever we want to speak with him.”

### **Summary**

In this chapter the results of the study were presented. This chapter was divided into five main sub-sections: the education systems in the studied countries, details of the participants, and responses from the principals, teachers, and students. The summaries of the education system in the studied countries as well as the details of the participants give context for the interview comments and helps with the analysis conducted in Chapter Five. The questions were organized in terms of the six INVEST factors, so that the comments can be associated with each factor to more easily conduct the analysis of how well the studied schools are learning organizations.

### **Chapter Five: Analysis and Findings**

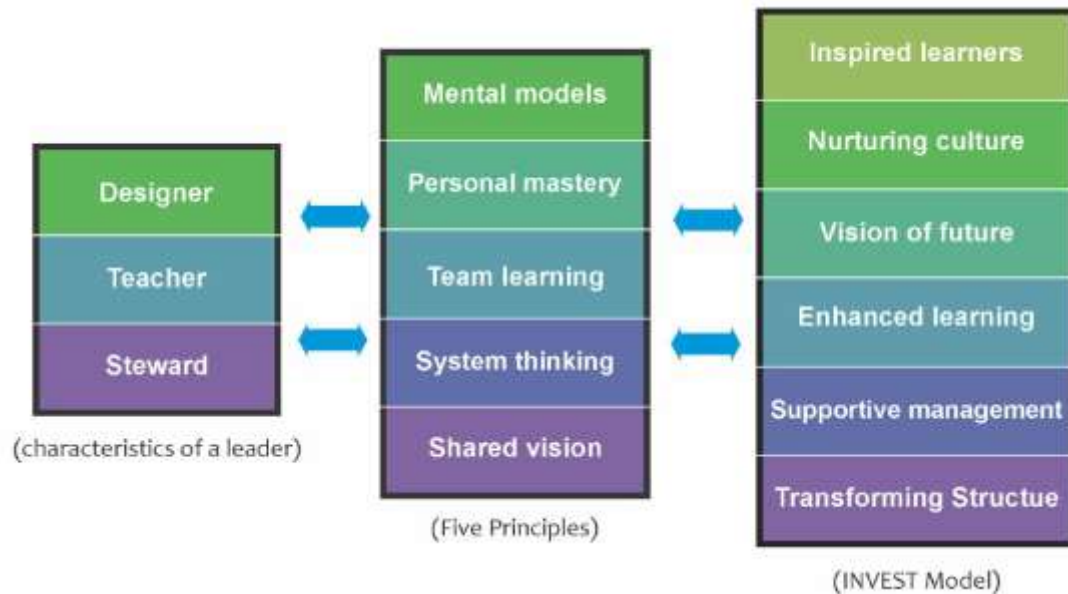
In this chapter, I will analyze the self-report data for the Leadership Styles and Organizational Structure dimensions that was presented in chapter four. In particular, the analysis will be framed in terms of a Learning Organization, since this provides a good foundation of both leadership and organizational structure for a potential model of educational leadership in global society. As such, the data will be analyzed in five ways: the Tannenbaum and Schmidt (T&S) leadership continuum (RQ1 & RQ2), characteristics of leaders (RQ3 & RQ4), learning organization principles (RQ3 & RQ4), the INVEST model (RQ3 & RQ4), and an integrated cross-case comparison. This analysis will provide a foundation for the educational leadership model (RQ7), as discussed in Chapter Six. The remaining research questions are addressed in Chapter Six.

First, the T&S continuum will be used to analyze the organizational structure of the schools (i.e., how vertical or horizontal the structure may be, as manifested in how different leaders behave). The T&S continuum is described in more detail in Chapter Two; briefly, the continuum is separated into seven levels, with level one representing the highest degree of hierarchy and centralization of decision-making (i.e., a rigidly hierarchical structure) and level seven representing the highest degree of decentralization possible while still retaining a leadership role (i.e., a flexible vertical structure).

The next three ways are different models that help to describe the concept of a learning organization from different perspectives. These perspectives have been directly addressed in the literature review, as noted in the introduction to Chapter Two. Figure 5.1 shows these three models and their components. Each model has been previously explained in Chapter Two, but will be described again briefly in the corresponding

section below. The left column describes the characteristics of a leader in terms of how well that individual would support or promote a learning organization approach (Senge, 1990). The middle column describes the five principles that individuals need to follow in order for a learning organization to function (Senge, 1990). The right column describes the six dimensions of a learning organization (INVEST), which help to identify the degree to which any organization could be considered a learning organization (Pearn et al., 1995). Although Figure 5.1 shows these three levels, it is not intended to depict any relationships that may exist between them; in other words, the characteristics of a leader may or may not be related to the INVEST dimensions: any such potential relationship is not shown in Figure 5.1.

The integrated analysis is meant to identify patterns within a case study and across the various case studies. In the analysis of the INVEST dimensions, each case (i.e., school in one country) is analyzed separately. In the integrated analysis, each type of participant is compared across the various cases (e.g., Canadian principal compared to the Turkish principal and then to the Iranian principal in terms of INVEST dimensions) and the cases themselves are compared (e.g., Canadian school compared to Turkish school). This analysis will primarily rely on the INVEST dimension data.



*Figure 5.1.* The three models that are used to analyze the study results.

Although the participants were asked questions regarding the INVEST framework, these questions were designed by me so that they could also be used for the other kinds of analysis (the T&S continuum, the leadership characteristics, and five principles of learning organization). To determine the scores for this analysis, I interpreted the participants' responses based on what each level represented (described in more detail below). Although the standard against which I compared the comments were developed by others, the exact method of interpretation based on the questions I asked has not been previously explored or validated. Further, I collected information from the participants and drew conclusions about these data, but did not in all cases have opportunity to 'member check'. Consequently, this may limit the reliability and validity of the findings. Based on the results presented here, this approach seems an appropriate one to take but further validation studies of the scoring mechanisms need to be conducted, especially since the interview questions were designed to be open-ended.



The rest of this chapter is divided into several sections. First, the school leaders (i.e., principals and teachers) are analyzed according to the T&S continuum. Second, the school leaders are analyzed according to the three characteristics of learning organization leaders. Third, the school leaders are analyzed according to the five principles of a learning organization. Fourth, the school for each country is analyzed according to the INVEST dimensions. The fifth section of this chapter contains the integrated analysis and indicates potential areas of improvement.

### **Analysis using the Tannenbaum and Schmidt Leadership Continuum**

To address research question two, the principals and teachers of each school were analyzed according to their level along the T&S continuum. As previously mentioned, a score of one on the continuum means the leader is highly authoritarian and controlling of the decision-making process while a score of seven means the leader is very democratic (i.e., not only open to the opinions of others but actually allows others to participate significantly in the decision-making process). The analysis for this section was conducted by looking at their comments to see how controlling they were over the decision-making process, how open they were to suggestions from others, and whether others were part of the decision-making process. For instance, the comments were analyzed to see if the principal made decisions with or without input from teachers, whether teachers were included in meetings for important decisions, and whether students were included in this process as well.

The data for the principals and teachers is shown in Table 5.1 below. As can be seen from that table, the Canadian school had a higher ranking based on both the principal's and teachers' higher level of willingness to engage with others as part of the

decision-making process. For the Canadian principal, this meant that he not only received comments from teachers but also included these comments to some degree in the decision-making process. For the Canadian teachers, their score meant that they were inclusive of the opinions, needs, and concerns of the students in how they organized and ran their classes. Furthermore, the students actually helped to make various decisions with respect to how the class was going to function. The principals and teachers of the Turkish and Iranian schools received the same ranking as each other, but it was lower than the Canadian principal and teachers. The principals and teachers of the Turkish and Iranian schools were open to getting comments from others but did little to include them in the decision-making process or running of their classes.

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Table 5.1.

*Ranking of principals and teachers along the T&S continuum*

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	Canada	Turkey	Iran
T&S ranking of principals	5	3	3
T&S ranking of teachers	6	3	3

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### **Analysis using the Learning Organization Leader Characteristics**

The Learning Organization Leader Characteristics model, as shown in Figure 5.1 as the left column, involves analyzing a leader according to three characteristics: teacher, steward, and designer. Each principal and teacher was analyzed in terms of the degree to which they reflect Teacher, Steward, and Designer characteristics. These three characteristics are described in more detail in Chapter Two. Briefly, having Teacher characteristics refers to having the ability to mentor, educate, and guide others in their development (Senge, 2002), and corresponds to the Enhance Learner component of the

INVEST model. Having Steward characteristics refers to having the attitude of being a servant of others rather than seeing oneself as inherently superior (Covey, 1990), and corresponds to the Supportive Management component of the INVEST model. Having Designer characteristics refers to having the ability to design the systems and processes that enable the organization to create and promote growth (Senge, 2002), which corresponds to the Transforming Structure component of the INVEST model.

This analysis was conducted by examining the comments of participants to see how their answers align with the definition of each characteristic. Since there are no instruments yet for measuring these characteristics, the analysis was conducted by defining three general levels (good, moderate, and poor). For example, a ranking of 'good' for the teacher characteristic means a person engaged in mentoring and empowering others, had an active learning approach, and engaged in learning himself or herself. A ranking of 'poor' meant a person did none of these, or only did them rarely, while a ranking of 'moderate' was meant to capture the situation where some of these topics were discussed but not all of them.

Tables 5.2 (below) and 5.3 (later in this section) show the levels that resulted from the analysis for the principals and teachers respectively. These levels were determined based on the various example quotes provided in the rest of this section. It is also important to note that, for this analysis, only the participants' own comments were examined. For example, analysis of a principal's comments about the designer characteristic did not include comments from teachers or students about the designer characteristic. That kind of analysis occurs later in this chapter (the INVEST section and the integrated cross-case section).

Table 5.2.

*Analysis results for Principals in terms of the three leader characteristics*

	Canada	Turkey	Iran
Teacher	Good	Moderate	Good
Steward	Good	Moderate	Moderate
Designer	Good	Poor	Poor

***Analysis of Canadian principal.*** The Canadian principal ranked as ‘good’ for Teacher characteristics because of how he emphasized learning: “I do mentoring ... because it’s part of my responsibility as a principal” (CP); “Sometimes I suggest to others a book that I’ve read or studied. Sometimes the teachers and I discuss these books too. But I don’t buy books for others, I’m not sure if they’d like the book” (CP); “in this school, the staff and teachers know what their responsibilities are. So they can monitor and organize their own responsibilities” (CP); and “I think our school is an alliance of learning. The goal is to improve teachers, staff, and especially students’ motivation to study and learn.” (CP)

The Canadian Principal was also ranked as ‘good’ for Steward characteristics. This can be seen in several of his comments about a desire to learn from others, such as “Of course, I’m open and interested in hearing about new approaches. As a PhD student I want to hear the opinions of others and learn from them,” (CP) and “I believe all principals have to help their staff and teachers learn, and sometimes the students too. Some principals prefer to be formal about this, using a specific way of learning. I try to be both formal and informal” (CP). It can also be seen in his willingness to allow others to make their own decisions, rather than assuming his decisions were always the best: “I like delegating some decisions and authority to others. If I have to make a decision in a

new area, I prefer making that decision in a group” (CP); “Our principal accepts new approaches. He is a positive and energetic individual, who is very supportive of teachers and staff.” (CT1); “Although he regularly uses a top-down method for management, he also delegates authority depending on the situation. I know this because I’ve had several opportunities because of him.” (CT1)

The Canadian Principal was also ranked as ‘good’ for Designer characteristics. This can be seen in his comments regarding his willingness to allow information sharing between individuals regardless of role, such as “We don’t have boundaries between these groups. All of us can work together, talk to each other, and share our opinions” (CP), and “Yes, my office door is open for all students and staff. I’m happy to hear from them, it’s an important part of my responsibility.” (CP)

*Analysis of Turkish principal.* The Turkish principal was rated as ‘moderate’ for Teacher characteristics. This can be seen in how, although he wants others to learn, he also carefully manages their behaviour: “I monitor everyone’s activities in this school,” (TP) and “Teachers can monitor the behaviour of students, and especially their success, using different methods like an oral or written exam. These assessments are good tools for monitoring students” (TP); “The teachers and staff in this school know their responsibilities and what is expected of them, but our principal also monitors us and deals with any conflicts or problems that arise.” (TT2)

The principal was also rated as ‘moderate’ for Steward characteristics. This is because he wants to help others grow and to learn from them, but still considers the approach to be taken as rigid and needs his approval: “my relationship with new ideas is good. Of course, it depends on our school’s vision. It has to align with it since we cannot

change the vision of our school” (TP); “I’m too busy of a person, but I would like to help my staff and teachers learn and improve their ability to learn” (TP); “I give all of my colleagues an opportunity to come up with their own ideas, and I support this process. However, as I told you, I’m the one responsible” (TP); “Delegation of authority is a touchy subject. Our school’s principal prefers to be the first one to handle major issues” (TT1); “Of course, students are free to visit their principal, and talk with him about any subject.” (TT1)

Lastly, the principal was rated as ‘poor’ for Designer characteristics. This was because he supported a very traditional, hierarchical form of interaction between individuals and limited the team approach that was taken: “There are teams but they depend on their field of study. So, we have teams for mathematics, physics, general science, and so on. They talk together to help develop each other’s knowledge” (TP); and “Again, delegation of authority is a hard topic. I believe the teachers are well experienced, so they know what is expected of them. Sometimes we talk about their objectives, but it’s not a general discussion.” (TP)

*Analysis of Iranian principal.* The Iranian principal was rated as ‘good’ for Teacher characteristics. For instance, his comments about the learning approach taken in the school: “We don’t use the name ‘alliance for learning,’ but I think we act this way both consciously and unconsciously” (IP); “We see the behaviour of other people and learn from them how we should, or shouldn’t, behave” (IP); and “we don’t talk about this normally. We don’t regularly examine other people’s behaviour, but sometimes teachers want to talk about it and so we do.” (IP)

He was rated as 'moderate' for Steward characteristics. This is because, although he wants to be open to the ideas of others and consider himself at the same level, he still tries to be inflexible and consider himself above the rest of the group: "I like to hear new ideas from our students and teachers, but we have to follow the rules and guidelines from the school board" (IP); "I trust my colleagues, but since I'm the one who is responsible I have to consider all the sides of a decision" (IP); "I am responsible, so I prefer to make major decisions, but I collect suggestions from others. So, I make the decisions but I use my knowledge and the knowledge of my colleagues" (IP); "our principal is not open to new ideas from his staff or other teachers because that's what is expected of him: to follow the role given to him" (IT1); "I don't think administrators in general help other teachers and staff to improve their skills or knowledge, but this is because they aren't told to do so by the higher levels of the education system" (IT1)

Lastly, he was rated as 'poor' for Designer characteristics. This is because he still focuses on a more traditional, hierarchical approach and limited team-building activities:

Teamwork between students would be good, since it's a more active learning approach as you previously mentioned, but the quality and effectiveness of this strategy depends on the teachers. Team activities can be hard sometimes for Iranians, especially Iranian students, but I believe we have to improve this and create a better relationship between students and teachers. (IP)

"I think I use [a systems] type of approach, but it's not a regular model for our school."

(IP) However, his comments suggest that this poor rating is a result of the wider school system and is not restricted to his school. This thought is supported by a comment from IT1:

our principal never encourages or asks us to learn new things [...] the principals have to follow the rules given to them from Tehran [Iran's capital]. Because of how centralized the education system is, principals, teachers, other staff and even students are limited in what they can do and how they can develop regarding their responsibilities.

Table 5.3.

*Analysis results for Teachers in terms of the three leader characteristics*

	Canada	Turkey	Iran
Teacher	Good	Good	Poor
Steward	Good	Moderate	Moderate
Designer	Good	Moderate	Moderate

***Analysis of Canadian teachers.*** The Canadian teachers were rated as 'good' for Teacher characteristics. This can be seen in their emphasis on learning from each other, and using different methods of learning: "Our school offers mentoring, and all of the staff here have many sources and opportunities for learning." (CT1) "In my classes I like learning from my students, and from other staff or teachers. However, this is my approach. Different teachers have different strategies." (CT2) The teachers were also rated as 'good' for Steward characteristics, because of their willingness to listen to the students and focus on what will help the students develop: "In my class I try to adapt my methods to the students, because I see they're at different levels of skills" (CT1).

***Analysis of Turkish teachers.*** The Turkish teachers were rated as 'good' for Teacher characteristics. This is because of their emphasis on the learning of students, as well their own desire to learn: "Giving advice or training students is part of my job. Actually, I'm not really able to focus on all the needs of my students, but I would like to



help them” (TT1); “I train my students both in and outside of class, though it is of course only within the school itself” (TT2); “I think all of our teachers, staff, and students are highly motivated when it comes to learning. Learning is the objective of all the schools in Turkey.” (TT2) The teachers were rated as ‘moderate’ for Steward characteristics though. This is because, although they are open to new ideas from students they also take a rather traditional and hierarchical approach to their role as a teacher: “Our teachers are interested in hearing new ideas, and like to try out new approaches. ... we would like to hear ideas and opinions from students;” (TT1) “I don’t think the teachers nor our principal practices metacognition” (TT1); “I like to reflect on the mental models I have, but this is hard to do ... I don’t have much time to think about my mental models.” (TT1) The teachers were also rated as ‘moderate’ for Designer characteristics. This is because, despite their preference for a traditional instead of systematic approach they still try to be open to new ideas and move towards a more systematic approach: “I prefer to see all of the expected roles and responsibilities of members of this school known and followed. Our principal agrees, and likes to make sure we have clear responsibilities” (TT1); “It’s not necessary to tell us that we have to learn new things, we [the teachers] already know this” (TT1); “I don’t think all the teachers here use a systems approach, but that is a good method for education.” (TT1)

*Analysis of Iranian teachers.* The Iranian teachers were ranked as ‘poor’ for the Teacher characteristic. This can be seen in their comments about their limits for improving their own knowledge and the problems they have teaching students: “knowledge is important for teachers, and one of the ways to develop this is through having a good library and laboratories. Both of them are in our school, but neither of

them are used by the students or teachers” (IT1); “Discipline is poorly handled in our education system. Most of the time, students and their parents want to solve this kind of problems with very informal methods” (IT1); “teachers do not use a mentoring method. This is because many students and teachers don’t know what mentoring is, and they have not been taught this either” (IT1). The teachers were ranked as ‘moderate’ for Steward characteristics. This is because they still use a very limited and rigid approach to their role as a teacher: “All of the staff here think that, because they know their responsibilities and what is expected of them, it’s not necessary to hear the opinions of others. We just look to the curriculum for ideas and information” (IT2); “we don’t have a systematic approach to our education. Teachers have a second job, and many have a third” (IT2); and “[metacognition, critical analysis, collaborative] are new for our school. We never talk about these topics” (IT1). The teachers were also ranked as ‘moderate’ for Designer characteristics, again because of their focus on a non-systematic approach despite a desire to see something better. This is seen in comments such as: “I don’t think there is collaboration in our school or even monitoring. I don’t see this kind of management in our school at all” (IT2); “Because of how centralized the education system is, principals, teachers, other staff and even students are limited in what they can do and how they can develop regarding their responsibilities” (IT1).

### **Analysis using the Five Principles of Individuals in Learning Organizations**

The Five Principles model, shown in Figure 5.1 as the middle column, involves analyzing individuals in an organization (usually a leader) according to the five principles for learning organizations: shared vision, mental models, personal mastery, team learning, and systems thinking (Senge, 1990). These principles were discussed in detail in

Chapter Two. The analysis was performed by determining how closely responses from principals and teachers aligned with the definitions of each principle. Since no instrument for doing this kind of analysis has been developed yet, I conducted this analysis by identifying as ‘good’, ‘moderate’, and ‘poor’ the degree to which the comments aligned with the definitions of each principle.

For example, shared vision means whether a leader builds a shared and mutual understanding of the vision or goals of the organization (Senge, 1990). So, if a principal has a vision but puts no effort into talking to others about it (sharing it) or seeing if others understand it (building mutual understanding), then the principal was rated as ‘poor’ for shared vision. If a principal shares a vision with others, and invites discussion on it but does not use the feedback to build deeper understanding, then the principal was rated as ‘moderate.’ Lastly, if the principal shares the vision, invites discussion on it, and helps others to understand that vision including using feedback from others to adjust the vision (or at least how it is presented) as necessary then the principal was rated as ‘good.’

The mental models principle refers to how much and how deeply people discuss and reflect upon their deep-seated beliefs, values, and assumptions (Senge, 1990). A ‘good’ rank means participants shared, discussed, reflected-upon, and attempted to change their mental models. A ‘moderate’ rank means they discussed and/or reflected-upon their models but did not attempt to revise them. A ‘poor’ rank means little or no discussion and/or reflection occurred.

The personal mastery principle refers to one’s own self-awareness and helping others to build self-awareness (Senge, 1990). Thus, a ‘good’ rank means participants shared a sense of their own self-awareness and actively helped others to build this

awareness. A 'moderate' rank means they had a sense of self-awareness but did little to help others build their own awareness. A 'poor' rank means their own self-awareness was limited and they did little to promote or support building self-awareness in themselves or others.

The team learning principle refers to how well individuals worked together as a team, in the sense of how much they shared and discussed information, insights, experience and supported each other not only in the task to perform but also in improving their own knowledge and skills (Senge, 1990). Thus, a rank of 'good' meant participants worked regularly in teams, shared experiences with each other, and used various techniques (like metacognition) to help each other learn and improve. A rank of 'moderate' meant they worked in a team and may have shared experiences (but not regularly) and/or occasionally (or not at all) helped others improve. A rank of 'poor' meant they rarely worked as a team, even just in terms of discussing topics or sharing ideas, and rarely or never helped each other improve.

The systems thinking principle refers to how well individuals think in terms of the relationships between objects rather than solely look at the object itself (Senge, 1990). In the context of this section, systems thinking refers to how well the principals and teachers interacted with each other. For instance, a rank of 'good' means principals and teachers respected each other's roles, worked with each other as though the organization had a horizontal (instead of vertical or hierarchical) structure, and empowered others to operate creatively, effectively, and respectfully within the horizontal-style organizational structure. A rank of 'moderate' means they worked respectfully and well with each other, but did little to empower others and/or operated with a hierarchical instead of horizontal

structure. A rank of ‘poor’ means the individuals focused only on their own area of expertise and did little to support each other or adjust the organizational structure to be horizontal in nature, though they could still be respectful towards each other.

Tables 5.4 (below) and 5.5 (later in this section) show the levels that resulted from this analysis for the principals and teachers respectively. How these levels were determined can be seen from sample comments in the rest of this section. For this analysis, like the analysis on the leadership characteristics, only the participants’ own comments were examined. For example, the analysis of a principal’s comments on Shared Vision did not include comments from teachers or students on the same topic. For the analysis combining comments across participant types, see the integrated cross-case section.

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Table 5.4.

*Analysis results for Principals in terms of the five learning organization principles*

	Canada	Turkey	Iran
Shared vision	Good	Moderate	Moderate
Mental models	Moderate	Moderate	Moderate
Personal mastery	Moderate	Poor	Poor
Team learning	Moderate	Moderate	Moderate
System thinking	Moderate	Poor	Poor

***Analysis of Canadian principal.*** The Canadian principal was ranked as ‘good’ for Shared Vision, as can be seen from his comments: “Our vision is clear. I regularly ask for and collect my teachers’ and staff’s opinions about the vision and state of things and send that information to the school board too;” (CP) “You can see our school’s vision statement in many areas” (CP).

He was ranked 'moderate' for using Mental Models, as seen in this comment: "I believe teachers have more power in class, so if we improve them and their ability to teach then we will achieve more positive feedback. So, my principle focus is on improving the teachers" (CP).

He was also ranked 'moderate' for using Personal Mastery, as seen in comments of his such as: "Of course I make mistakes, and I learn from them. I have told, and regularly tell, my staff and teachers about the importance of learning from mistakes" (CP); "I use brainstorming in decision making, since it is an excellent model. I like it when people are free to suggest and explain their opinions" (CP).

He was also ranked as 'moderate' for using Team Learning because of comments like these: "In this school, the staff and teachers know what their responsibilities are. So they can monitor and organize their own responsibilities" (CP); "Sometimes I suggest to others a book that I've read or studied. Sometimes the teachers and I discuss these books too. But I don't buy books for others, I'm not sure if they'd like the book" (CP); "I think our school is an alliance of learning. The goal is to improve teachers, staff, and especially students' motivation to study and learn" (CP).

Lastly, the Canadian principal was ranked as 'moderate' for using Systems Thinking, as can be seen in comments such as: "my office door is open for all students and staff. I'm happy to hear from them, it's an important part of my responsibility. We don't have boundaries between these groups. All of us can work together, talk to each other, and share our opinions" (CP).

*Analysis of Turkish principal.* The Turkish principal was ranked 'moderate' for using Shared Vision. This can be seen in comments such as "There is a plaque on my

office wall, and our vision is written on it. This is an old and famous historical school, so we've had a clear vision from a long time ago" (TP) and "I'm sure this vision is clear for everyone. There's no doubt that the staff and teachers know about it" (TP). However, his comment "This vision is for the past, present, and future" (TP) implies there is no need to change the vision.

He was ranked 'moderate' for using Mental Models, because he was trying to keep his mental model aligned with the school board's rather than reflect for himself. This can be seen in comments such as "my relationship with new ideas is good. Of course, it depends on our school's vision. It has to align with it since we cannot change the vision of our school" (TP) and "No, I'm too busy of a person [to help teachers in their own learning], but I would like to help my staff and teachers learn and improve their ability to learn" (TP). Note that a rank of 'poor' was not given because he was still aware of his mental models.

He was ranked as 'poor' for using Personal Mastery. This can be seen in various comments suggesting he recognizes the importance of developing personal mastery in others but is unwilling or unable to do this: "This is an educational institution, so we have to regularly and continually learn" (TP); "The basic principle of personal or individual learning affects the quality of this school" (TP); "Teachers and students are always ready to come up with their own opinions" (TP); "I don't have any way or method for re-thinking our approaches" (TP); "Those topics you mention [e.g., metacognition] are new for our schools" (TP). As well, his behaviour towards the two students who entered his office to get his signature indicates he may be more interested in ensuring others behave according to his rules rather than in a way that empowers them.

He was ranked 'moderate' in using Team Learning, as can be seen in his emphasis on monitoring others -- "I monitor everyone's activities in this school" (TP) -- and his comment about the need for teachers to handle their students: "Teachers can monitor the behaviour of students, and especially their success, using different methods like an oral or written exam." (TP)

Lastly, he was ranked as 'poor' for using Systems Thinking. This can be seen in the comments on the limited team-interactions and emphasis on centralization: "There are teams but they depend on their field of study. So, we have teams for mathematics, physics, general science, and so on. They talk together to help develop each other's knowledge" (TP); "We have a good library and lab, so teachers and students can use that to improve their knowledge" (TP); "Delegation of authority is a hard topic. I believe the teachers are well experienced, so they know what is expected of them. Sometimes we talk about their objectives, but it's not a general discussion" (TP).

*Analysis of Iranian principal.* The Iranian principal was ranked as 'moderate' for using Shared Vision. He had a vision available but insisted it remained with limited accessibility: "Yes, there is a vision for this school. It's available in my office here, but also the office of the [vice principal]" (IP); "No [it's not necessary to promote the vision], I think all of the staff and teachers already know the vision for our schools" (IP).

He was also ranked as 'moderate' for Mental Models for reasons similar to the Turkish principal: the Iranian principal tried to keep his mental models aligned with the school board's expectations, rather than adjust it for himself. This can be seen in comments such as: "I like to hear new ideas from our students and teachers, but we have to follow the rules and guidelines from the school board" (IP); "decision making is



centralized” (IP); “I trust my colleagues, but since I’m the one who is responsible I have to consider all the sides of a decision” (IP).

He was ranked as ‘poor’ for Personal Mastery, due to his narrow thinking on what it means to develop others in the school:

“Our school is a place for research. Actually, I’m able to do research as a principal in this area. As a case study, for example, some teachers get together and discuss a specific problem they have like a student’s behaviour, material to teach, and so on. This is what we’d call teamwork. (IP)

Another comment supporting this ranking was:

Even if I learn from my mistakes, I don’t like to repeat them again. I would prefer to study and research my options before I act. The way I handle things is through managing all aspects of some activity, but of course I know that sometimes I can’t see all of the related variables. However, I don’t consider this a reason for not controlling my mistakes. Actually, my supervisor has ignored some mistakes once or twice, but after that he officially notifies me about them. (IP)

He was ranked as ‘moderate’ for Team Learning, given his emphasis on monitoring. For instance, he talked about continually watching the real-time camera feeds of the school and being the final reviewer of marks: “We have an assessment system, which teachers and myself can use, that manages the students. For the final marks, I have to monitor them and make sure they are consistent with our guidelines” (IP).

He was also ranked as ‘poor’ for Systems Thinking, primarily because of his emphasis on a strict hierarchical approach:

Teamwork between students would be good, since it's a more active learning approach as you previously mentioned, but the quality and effectiveness of this strategy depends on the teachers. Team activities can be hard sometimes for Iranians, especially Iranian students, but I believe we have to improve this and create a better relationship between students and teachers. (IP)

Another comment that indicates his hierarchical approach is: "I like to do that kind of work myself [rather than delegate it]. I've defined the job for my assistants very clearly, and I monitor them regularly to make sure things are going well." (IP)

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Table 5.5.

*Analysis results for Teachers in terms of the five learning organization principles*

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	Canada	Turkey	Iran
Shared vision	Moderate	Poor	Poor
Mental models	Moderate	Moderate	Moderate
Personal mastery	Moderate	Poor	Poor
Team learning	Good	Moderate	Poor
System thinking	Moderate	Poor	Poor

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***Analysis of Canadian teachers.*** The Canadian teachers were ranked as 'moderate' for using a Shared Vision, as can be seen in comments such as: "I haven't seen a vision for my school, so I don't know what it is" (CT2); "The school board creates a vision for our school, so we can talk with them about it." (CT1); and "We can go to the board office and see the vision written down there, or give them suggestions and comments. I haven't seen that vision displayed in my school though." (CT1)

They were also ranked as 'moderate' for Mental Models because, although they are aware of their own mental models, there was a tendency to defer their thinking to authority because of the hierarchical structure. This can be seen in comments like:

“Although [our principal] regularly uses a top-down method for management, he also delegates authority depending on the situation. I know this because I’ve had several opportunities because of him.” (CT1)

They were also ranked as ‘moderate’ for Personal Mastery, due to their desire to increase learning but limitations with realizing that desire: “Personal learning is important for all teachers and students. However, it depends on the school. We can’t say that all schools have the same principles, since they use diverse methods, but all principles are meant to help students succeed” (CT1); “Yes, we use methods like teamwork and brainstorming, but the teamwork is focused on the subject, such as between mathematic teachers, chemistry teachers, and so on.” (CT1)

They were ranked as ‘good’ for Team Learning because their statements emphasized considering the ideas of others and trying to incorporate them in the learning process: “Our school offers mentoring, and all of the staff here have many sources and opportunities for learning” (CT1); “In my classes I like learning from my students, and from other staff or teachers. However, this is my approach. Different teachers have different strategies” (CT2); “I can’t say that our school is a learning organization, using your definition, but we can learn from each other” (CT2).

Lastly, they were ranked as ‘moderate’ for Systems Thinking because of the level at which the decision-making process was distributed: “Decision making is a difficult issue to analyze. In my school, based on your description, our principal uses a top-down approach and I think it would be around level five [for Tannenbaum and Schmidt’s theory]” (CT1); “I don’t think we have a democratic style of administration. Given your

description, is there a level between four and five? I think that's where our school fits."

(CT2)

*Analysis of Turkish teachers.* The Turkish teachers were ranked as 'poor' for having a Shared Vision, given the difficulty they had with the vision of the school: "Yes [there is a vision in the office], but that is about our school's history" (TT1); "As teachers, we never talk about the school's vision between us, but I think all of them know their responsibilities and that is enough" (TT1);

I think my vision for my teaching work is more important [than the school's vision] because a majority of these students are from secular families. Hence, I have to teach them religious issues with a language that they can understand. This is my vision, and I think the school's vision is the same: developing an Islamic approach to education. (TT2)

"We [the teachers] never talk about our school's vision with the students. We [teachers and students] have unwritten rules about our expectations for each other, and their [students'] future is important for us [teachers]" (TT1); and "Commitment is an important part of our job. In my opinion, it's very important. However, it depends on the person."

(TT1)

They were ranked as 'moderate' for Mental Models because of their emphasis on the hierarchical nature of the school: "we would like to hear ideas and opinions from students" (TT1); "teachers and staff know their responsibilities and they try to do them" (TT1); "[our principal] monitors everything anyway, so maybe that is his responsibility" (TT1); "I like to reflect on the mental models I have, but this is hard to do [...] My

Turkish culture encourages me to focus on work and family, so I don't have much time to think about my mental models" (TT1).

They were ranked as 'poor' for Personal Mastery. This can be seen in the narrow focus of the learning that occurs in the school and the limited support for the growth of others: "Self-confidence is necessary for this job, and of course all teachers are in a good position for that. Sometimes new teachers have problems with teaching, but after some time they'll learn some practical teaching methods" (TT1); "My field, Theology, is different from that of other teachers. I'm alone in this school for my topic" (TT2); "Yes, we have group learning activities based on subject. Since I teach mathematics, all discussions in my groups will be about math. However, we introducing new books, ask questions about our subject, and even sometimes use brainstorming" (TT1); "I like to use discussions and brainstorming in my classes, and want to develop this further" (TT2)

They were also ranked as 'moderate' for Team Learning because of their desire to support the students but limited ability to do so: "I'm not really able to focus on all the needs of my students, but I would like to help them" (TT1); "I train my students both in and outside of class, though it is of course only within the school itself" (TT2); "We have a good library in this school. All of the teachers, staff, and students are welcome to use it. However, most of the time our library is empty" (TT1); "I think all of our teachers, staff, and students are highly motivated when it comes to learning. Learning is the objective of all the schools in Turkey." (TT2)

Lastly, they were also ranked as 'poor' for Systems Thinking because of their limited desire to work together, share information, and distribute leadership roles: "I don't think all the teachers here use a systems approach, but that is a good method for

education” (TT1); “Cooperation is good, but not between all of the teachers. We generally work together based on our field or group” (TT1); “It’s not necessary to tell us that we have to learn new things, we [the teachers] already know this” (TT1);

I’m not sure about others but as a teacher, or as part of a group of teachers for the same subject, I want to recognize my students’ needs and try to solve them. Our responsibility is to give up-to-date information to students and then evaluate their learning with different kinds of methods, like an oral exam, diverse assignments, and written exams. However, as a group, our responsibility is to find new subjects and teach new information that help students to increase their knowledge so that they can be accepted into universities with a high rank. Because we know they will have difficult tests and competition from other students in the near future.

(TT1)

“I prefer to see all of the expected roles and responsibilities of members of this school known and followed. Our principal agrees, and likes to make sure we have clear responsibilities.” (TT1)

*Analysis of Iranian teachers.* The Iranian teachers were ranked as ‘poor’ for shared vision given the difficulty they had with understanding or even accessing the vision for their school: “I have not heard about our school’s vision, but I believe teachers have to teach and assess students very well. I could not find anything about our school’s vision on the Internet either” (IT2); “[...] in Iran we have different types of schools, each of which have different visions for their students. [...] all the good students are in the same class or school, and the struggling students do not have the opportunity to learn from their classmates” (IT1).

They were also ranked as ‘moderate’ for Mental Models because of their awareness of the models but also their deference for authority and the hierarchical model of their school: “our education system follows a very hierarchical system. Any new ideas we get are supposed to be from a higher level” (IT1).

They were also ranked as ‘poor’ for Personal Mastery. This is because, although the teachers may want to do more to help their students achieve more, they are either limited by the structures of the school or their own abilities: “I don’t think this education system has any principles for learning” (IT1); “students don’t understand the purpose of teamwork. Also, students stay in teams when they are weak or lacking; if one person thinks they know enough, even a small part of the needed knowledge, then they prefer to work alone” (IT2);

Teachers can join various in-service training classes and, depending on the subject, teachers can select their preferred topic. However, even in these classes a lot of teachers do not focus on the training itself. Teachers would rather join these classes to receive a certificate, and these certificates are used later to show how ‘good’ of a teacher they are. (IT1)

“I try to develop thinking through brainstorming, since I believe this strategy can help students improve their knowledge. Additionally, I want them to share their mistakes to help learn from them.” (IT2)

The teachers were also ranked as ‘poor’ on Team Learning, because they focused too much on a hierarchical model: “In my school, teachers do not use a mentoring method. This is because many students and teachers don’t know what mentoring is, and they have not been taught this either” (IT1); “we don’t have a systematic approach to our

education. Teachers have a second job, and many have a third” (IT2); “Since this is a public school, we use a hierarchical model” (IT1); “one of the ways to develop [knowledge] is through having a good library and laboratories. Both of them are in our school, but neither of them are used by the students or teachers” (IT1); “I don’t think there is collaboration in our school or even monitoring. I don’t see this kind of management in our school at all” (IT2).

Lastly, the Iranian teachers were also ranked as ‘poor’ for Systems Thinking because of their limited motivation and ability to learn new things, as well as the centralized planning. In addition to what has been previously quoted, other quotes that show this point include:

No, our principal never encourages or asks us to learn new things. I think we talked about this already; the principals have to follow the rules given to them from Tehran [Iran’s capital]. Because of how centralized the education system is, principals, teachers, other staff and even students are limited in what they can do and how they can develop regarding their responsibilities. (IT1)

As well as: “Teamwork exists in our education system symbolically, but we are very unsuccessful in how it is applied” (IT2).

### **Analysis using the Six-Dimensional INVEST Model for Learning Organizations**

The different schools were analyzed using the INVEST model to determine the degree to which they were learning organizations. INVEST is an acronym referring to the six dimensions of: inspired learners, nurturing culture, vision for the future, enhanced learning, supportive management, and transforming structures (Pearn et al., 1995). For this analysis, comments from each type of participant were considered separately (i.e.,



scores for each INVEST dimension were separately determined for the principals, teachers, and students). Each dimension was given a score ranking from 1 to 9, such that there were five levels (1-2, 3-4, 5, 6-7, and 8-9) with scores of 1 or 2 being the lowest level and scores of 8 or 9 being the highest level. This was the scoring used by Nekovei-Moghadam and Beheshtifar (2011), and it was preferred over the English equivalent (e.g., see Hallam, Hiskens, & Ong, 2015) which were rough terms such as ‘starting’ (similar to scores 1 to 2), ‘knowing’ (scores 3 to 4), ‘doing’ (scores 5 to 7), and ‘being invested’ (scores 8 to 9). To better understand how the comments were interpreted so as to determine a particular score, Tables 5.6 to 5.11 list the different levels for each dimension and provide examples of situations that would be expected for a learning organization at that dimension’s level. Thus, the comments from participants will be analyzed to see which situations they most accurately describe. As previously mentioned, the ranking level and standard against which the comments were analyzed were developed by Nekovei-Moghadam and Beheshtifar (2011), but how my questions were interpreted in light of their standard was conducted by me using a method that has not previously been validated.

Table 5.6.

*Examples and meaning of different levels for Inspired learners (I) dimension*

Level	Description
8-9	Staff at all levels of the organization learn continuously, the desire to learn new things is their motivation. The importance of learning is seen in the individual, groups, and organizational structure for both the present and future.
6-7	Continual learning occurs, but it is limited to certain high-performance individuals, groups, or parts of the organization.
5	Learning has been encouraged, and may be occurring, but nothing is being done to track, observe, or evaluate this learning.
3-4	There is talk among managers or upper-levels of the organization about the importance of continual learning, but nothing is being done to encourage, spread, or support these ideas.
1-2	There is no talk about the need for continual learning among the staff, and there is no motivation for staff to learn new things.

Table 5.7.

*Examples and meaning of different levels for Nurturing culture (N) dimension*

Level	Description
8-9	The desire for nurturing culture is present, encouraged, and supported at all levels of the organization, and there is regular and active evaluation of the effectiveness of methods for promoting this culture.
6-7	A nurturing culture is present, encouraged, and evaluated in some sense but this only occurs in certain areas of the organization.
5	A nurturing culture may be present or encouraged by individuals throughout the organization, but there is no method of evaluating it or determining the effectiveness of attempts at developing it.
3-4	Managers discuss the circumstances of the organization, and how others can be supported, and may benefit from any changes they introduce, but others in the organization do not do this or benefit from any changes.
1-2	Managers do not tolerate criticism of the status quo, they do not reveal or discuss mistakes and instead prefer to conceal the circumstances. If the mistakes are revealed, punitive systems are used as the only means of improvement.

Table 5.8.

*Examples and meaning of different levels for Vision of future (V) dimension*

Level	Description
8-9	A full description of the vision is available for all levels of the organization and all individuals, and all members of the organization understand and are committed to it.
6-7	An explicit vision is available to all levels of the organization and all individuals, but only certain individuals, groups, or departments know and are committed to it.
5	An explicit vision is available to more than only the highest-level of the organization, but nothing is being done to evaluate its effectiveness or if others are aware of the vision.
3-4	A vision is implicit in the operation of the organization, or it is explicit but available only to the highest-level of the organization.
1-2	There is only a guess or implicit assumption of vision for the organization.

Table 5.9.

*Examples and meaning of different levels for Enhanced learning (E) dimension*

Level	Description
8-9	All members of the organization regularly use various methods of enhanced learning (e.g., talking with other people, individual growth programs, coaching communication networks, systematic thinking, learning laboratories), and these methods are evaluated for effectiveness so as to determine which techniques to continue using.
6-7	Enhanced methods of learning are used regularly, and the outcomes are evaluated for effectiveness, but only in certain areas or groups of the organization.
5	Enhanced methods of learning are used regularly or by more than only managers, but the effectiveness of these techniques are poorly evaluated or not evaluated at all.
3-4	Some enhanced methods of learning are used, but only by managers and only occasionally.
1-2	Enhanced or improved methods of learning are rarely used.

Table 5.10.

*Examples and meaning of different levels for Supportive management (S) dimension*

Level	Description
1	
8-9	Managers at all levels of the organization are actively engaged in supportive management practices, and are supported and encouraged by others in the organization.
6-7	Some individuals, groups, or departments of an organization are actively engaged in supportive management, but it is not widespread.
5	There is a change in behaviour among of various groups towards supportive management, but there are no processes in the organization to support, promote, or evaluate these changes.
3-4	Although managers believe in the need to be supportive and learn new models and techniques, they do not change their behaviour (e.g., top organizational executives behave differently than what they say to do).
1-2	Traditional style of management is common at all levels of the organization, and people emphasize and praise traditional performance metrics.

Table 5.11.

*Examples and meaning of different levels for Transforming structure (T) dimension*

Level	Description
8-9	The design of the organization is purposeful and intended to encourage and facilitate learning. Client-centered thinking has been institutionalized. Teamwork is an institutional organization and a flat organizational chart structure.
6-7	Strategies for adjusting the organization's structure, evaluating its effectiveness, and encourage reflection on the state of the organization are in place and regularly used but only in certain parts of the organization.
5	Strategies are being used to adjust the structure of the organization and encourage inter- and intradepartmental communication. However, there are no methods or processes for evaluating the effectiveness of such strategies.
3-4	There are problems but the organization is aware of this to some degree. A rigid hierarchical structure is used as a method for solving such problems, and workflow is promoted within each unit or department. There is a low level of mutual understanding between individuals in the same (and especially different) department.
1-2	The organization has problems with its structure and departments, work flow occurs slowly or not at all, and most importantly, the organization itself is unaware of this.

***Scoring and analysis for Canadian school.*** The INVEST scores for the Canadian participants can be seen in Table 5.12 below and a comparison of the scores is shown in

Figure 5.2. The Canadian school, from the perspective of the principal, is quite good.

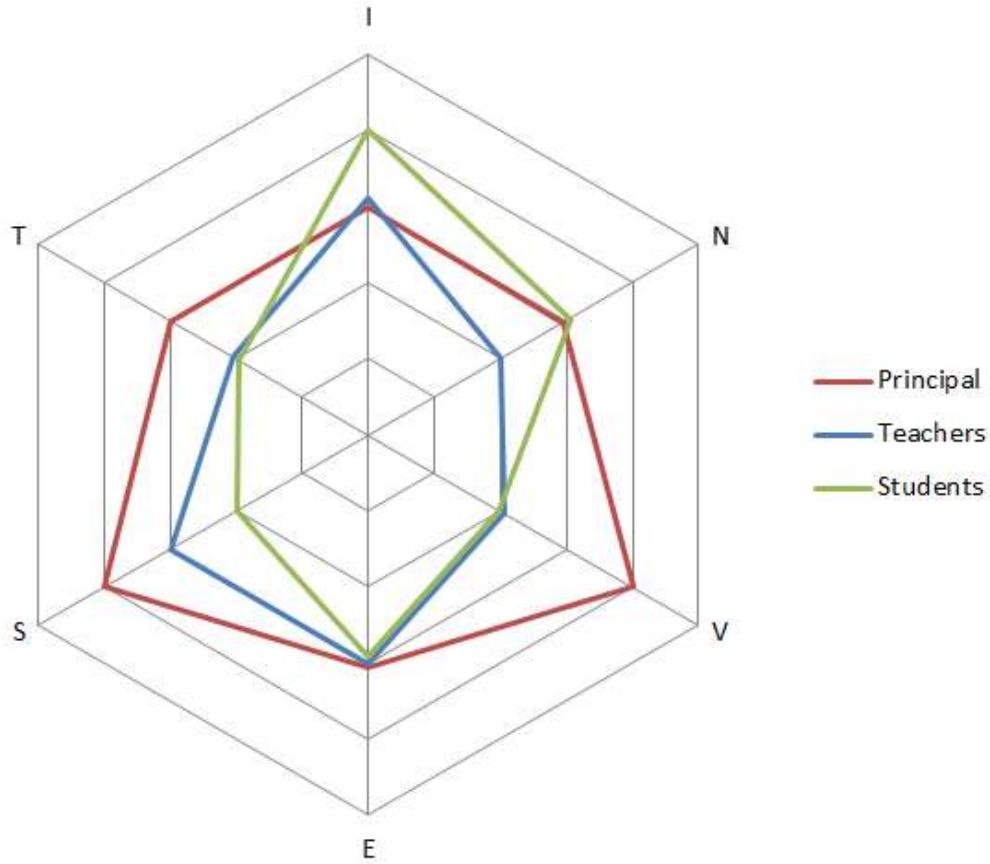
However, the teachers and students believed they did not have enough information about their school's vision. The students also believed that their teachers, and principal, did not conduct supportive management well. It is also notable that the quality of supportive management decreased as one looks at the scoring from the principal, to teachers, and then to students. Thus, it is possible that the support has not reached the students or the student-level of the school but it may be present elsewhere. If we focus on the Vision for the Future dimension though, it is the biggest gap between the principal and other participants and is probably the biggest issue for the Canadian school to handle. In the rest of this subsection, the score for each INVEST dimension of the Canadian school is analyzed in more detail.

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Table 5.12.

*INVEST scores for the Canadian School*

Dimension	Principal Score	Teacher Scores	Student Scores
Inspired Learners	5	5	6-7
Nurturing Culture	5	3-4	5
Vision for the Future	6-7	3-4	3-4
Enhanced Learning	5	5	5
Supportive Management	6-7	5	3-4
Transforming Structure	5	3-4	3-4



*Figure 5.2.* Comparison of INVEST scores for the Canadian school using data from Table 5.12.

For the Inspired Learners dimension, the comments indicate a realization of the need for change and improvement and the desire to make such changes:

I motivate myself and others for higher quality teaching because I believe the world, and our society, has changed; we cannot follow a traditional model, and role models are the best model to follow. In other words, as an administrator, principal, and leader of this school I would like to be a positive role model. Oh, I would also be a role model for staff too of course. (CP)

Similar comments were seen from the teachers: “As a classroom teacher for nearly 13 years I think the first step of motivation is respect for people’s opinion, and that includes

respecting your own opinions” (CT2); “I think the basic reason for motivation is curiosity that exists between teachers. My basic strategy is to find a method to teach students and help them be successful” (CT1).

Likewise, consider these quotes from the teachers: “I believe lifelong learning is a perfect method, so I try to learn from all people in all walks of life” (CT2); “In my opinion, of course self- and group-actualization are necessary, and some teachers want to develop this approach of course but not all of them do” (CT1). A lifelong learning approach is very important for the teachers to improve themselves, and although it is good that they want their students to be empowered and self-directed this seems to come only from some of the teachers. Since students move between several teachers each day in Canadian high schools, I do not think they will develop self-actualization or global competence when only one or two of the many teachers they see throughout their time in high school encourages such things.

The students seemed to be very motivated for learning from an internal or self-directed orientation: “My motivation for learning is a degree from university. I would like to be a biologist, hence, I have to study hard. [...] I believe all students have opportunities to grow [in experience] and learn from other students” (CS1); “My motivation for learning is having a future with a stable job, so I would like to go to university. University is important to me because I believe I can find a job with a university degree” (CS2); “Learning in my school depends on ourselves” (CS1). However, I believe this desire for learning is limited to what will lead to work and not necessarily for self-improvement. Similarly, I do not think the school policies helped to create a critical approach the students’ understanding of the goal for their learning; in other words, the

students are interested in learning because of a job they want to have, likely because of what they have heard or seen from their family. In other words, these students are motivated more from their family than from their teachers at school.

For the Nurturing culture dimension, the scoring was based on comments showing a greater degree of power given to teachers and their ability to change students' attitude. For example, the principal and students said that they tried to learn from their mistakes as a way of improving themselves: "I make mistakes and learn from them" (CP); "I have told, and regularly tell, my staff and teachers about the importance of learning from mistakes" (CP); "I learn from my mistakes but I don't like to [make mistakes]" (CS1). The teachers had no comment on that topic, but the principal claimed that he regularly tells the teachers to do this so it can be assumed that the teachers are likely aware of this topic. The encouragement to learn from mistakes is part of a nurturing culture, but it is possible that the students, at least, are thinking about this topic in terms of their work or school assignments rather than their overall life. Since the teachers did not comment on it, it is unlikely that they are encouraging learning from mistakes in the students' overall life but probably just in terms of regular improvement with curriculum content; such encouragement is consistent with the general approach to teaching in Canadian high schools.

Another aspect of nurturing culture is how the participants approach working in groups. Based on the comments, it seems that learning in groups is seen as important but is not practiced often or well: This can be seen in comments mentioning various methods for a nurturing culture, such as: "I use brainstorming in decision making, since it is an excellent model. I like it when people are free to suggest and explain their opinions"



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(CP); “Group learning is a good method, we have some groups and I would like to develop them. For me I would like to take them separately” (CP); “Personal learning is important for all teachers and students. However, it depends on the school. We can’t say that all schools have the same principles, since they use diverse methods, but all principles are meant to help students succeed” (CT1); “we use methods like teamwork and brainstorming, but the teamwork is focused on the subject, such as between mathematic teachers, chemistry teachers, and so on” (CT1); “We don’t have group or organizational learning. Actually, I prefer to study alone. Sometimes we have group activities in our courses, but those are just about the topics in that course” (CS1); “We are free to talk about our opinions in class, but our teachers didn’t talk about collaborative learning, metacognition, or critical learning, and anything like that” (CS2); “We don’t have any opportunity or time to find a new method for solving our assignments, like our mathematics assignment. Our teachers don’t use that brainstorming technique, but we are free to talk about our opinion” (CS1). From these comments it seems that the teachers say they use teamwork and brainstorming as a group learning technique, but the comments from the students suggest that the brainstorming is just sharing opinions. Either the teachers are using brainstorming in a very loose sense or the students do not understand how brainstorming occurs in their classroom, or perhaps a bit of both. However, if the teachers had been using brainstorming in a formal and structured sense, and thus also explained what they were doing so that the students understood how brainstorming worked, I think the students would have responded very differently. The comments also suggest that their methods for teamwork are very restricted. In the classroom it is probably just having some students work on an assignment together and that’s all, based

on the way the students and teachers talk about teamwork in their classes. Furthermore, the students do not seem interested in teamwork, which means they have either had bad experiences with it or do not see any value in working as a team. This is definitely an area that needs improvement, since the need to work cooperatively and cohesively as a team is important for not only many jobs but also fostering intercultural understanding and global competence.

For the Vision for the Future dimension, the scores differed quite a bit. The principal was confident a good vision was available and it was possible to adjust it given the right feedback: “Yes, our vision is clear. I regularly ask for and collect my teachers’ and staff’s opinions about the vision and state of things and send that information to the school board too” (CP); “You can see our school’s vision statement in many areas” (CP); “People have seen that statement, I know that the teachers and staff here know what our vision is” (CP); “[...] we of course receive this vision from the school board. However, we can send our comments, questions, and suggestions to them. So, in this case we have both a top-down and bottom-up system.” (CP) However, the teachers and students disagreed about the availability and clarity of the vision. This can be seen in comments such as: “I haven’t seen a vision for my school, so I don’t know what it is” (CT2); “The school board creates a vision for our school, so we can talk with them about it. We can go to the board office and see the vision written down there, or give them suggestions and comments. I haven’t seen that vision displayed in my school though” (CT1). Consider also this comment from a student:

I don’t know [the vision for my school]. But my vision is University. We don’t have a prevalent slogan in our school, and my teachers never mentioned one. I

certainly believe other students, my classmates, have no idea about our school's vision. We defined some objectives for ourselves, and sometimes we discuss those, but that's all (CS1).

This comment alone indicates that the vision for the school is not well understood by students, and the teachers' comments support this view. However, this student's comment also shows that the students are not even certain about their own goals; they do not know what the purpose of their schooling is. In response, they have created their own goals, likely employment and/or academic in nature, but unless these goals have been shared and discussed with the teachers the school cannot reliably support the students in achieving those goals. However, another student comment indicates that school environment is supporting the vision of learning curriculum content: "Honestly, I don't know my school's vision and mission, but I can guess it. Its mission is to help students to understand the knowledge in our text books" (CS2).

For the Enhanced Learning dimension, the scores were roughly similar. It seemed that all three participant types mentioned some enhanced learning techniques, but it is questionable how effectively those techniques were being used. For example, one aspect of enhanced learning is library materials and technology use. Comments from all participants suggest that plenty of material is available, but it is only partially used by only some of the school: "We have a nice computer lab and library. Anyone can go there to study or work. I'm happy to go there and do some research of my own" (CP); "Of course our school has a library and various labs, but not all of the students or teachers use them. However, those resources are available to everyone" (CT1); "We don't have learning labs, but teachers use videos and computers in our classes" (CS2); "We have a

library with many books on its shelves, but we don't have time to read them. We go to library only near exam time" (CS1). That the students tend to use the library for studying at exam time suggests the teachers are using more of a traditional or passive learning approach, even if they are using videos and other e-learning technology in the classroom. The following comment from a student seems to agree with this opinion: "Our school simply uses a traditional model. The teachers teach a course and we have to learn the material. Our school's responsibility is to graduate successful students who go to university" (CS1). If the school was using a more active learning approach, and if the students were empowered to do their own self-directed learning, then the comments would suggest it through comments about the students regularly using the library or technology to gather more information for their classroom and their own interests.

The Enhanced Learning dimension also looks at whether individuals at different levels of the school are supporting each other in terms of self-improvement. The principal seems to think he does this with the teachers, particularly through mentoring: "I do mentoring ... because it's part of my responsibility as a principal" (CP); "Sometimes I suggest to others a book that I've read or studied. Sometimes the teachers and I discuss these books too. But I don't buy books for others, I'm not sure if they'd like the book" (CP). The teachers recognize the importance of such support and mentoring, and acknowledge that it is part of the purpose of their school, but their comments fall short of saying that such mentoring or support is occurring in any systematic or regular manner: "Yes, I think our school is an alliance of learning. The goal is to improve teachers, staff, and especially students' motivation to study and learn" (CP); "In my classes I like learning from my students, and from other staff or teachers. However, this is my

approach. Different teachers have different strategies” (CT2); “I can’t say that our school is a learning organization, using your definition, but we can learn from each other” (CT2). If mentoring, spaces for sharing experiences, or opportunities for discussion and reflection were regularly used the comments from the teachers would mention such things instead of broadly suggesting that they could learn from each other and sometimes did. However, the students indicated that they certainly did not feel like the teachers were mentoring them: “I believe my school doesn’t use a mentoring system because the number of students in each class is important. Depending on the class we have approximately between 25 and 28, sometimes as much as 30 students” (CS1). This comment also shows a problem within the school: a teacher might be able to mentor 30 students, though likely with difficulty, but teachers in high school teach many classes and see much more than one class-worth of students. As such, a teacher would either need to mentor only some of the students in their classes, and create potential bias, or mentor many more students (potentially hundreds) which is likely impossible given their existing time limitations. If peer mentoring and/or co-learning strategies were used, as part of an active learning approach in class, then this could be a potential solution for the lack of mentoring. As well, the teachers are not using metacognition or critical pedagogy, given comments from both students and teachers. This means the teachers are mainly using the first three levels of bloom’s taxonomy.

For the Supportive Management dimension, the scores decreased with each administrative level such that the students provided the lowest score. This can be seen from quotes indicating different degrees of support as one goes down the administrative levels. For instance, comments from the principal included: “I’m open and interested in

hearing about new approaches. . . . I want to hear the opinions of others and learn from them” (CP); “I believe all principals have to help their staff and teachers learn, and sometimes the students too. Some principals prefer to be formal about this, using a specific way of learning. I try to be both formal and informal” (CP); “I like delegating some decisions and authority to others. If I have to make a decision in a new area, I prefer making that decision in a group” (CP). In other words, the principal is suggesting a very horizontal structure, and a leadership approach that involves a fair amount of delegation and shared decision making. However, comments from the teachers were not as strong. In terms of their relationship with the principal, the teachers provided similar comments as the principal: “In our meetings he [our administrator] listens to our suggestions and takes note of them” (CT1); “Although he regularly uses a top-down method for management, he also delegates authority depending on the situation. I know this because I’ve had several opportunities because of him” (CT1); “In my experiences I’ve worked with a couple different administrators. One of them was quite interested in hearing from others and delegating tasks as appropriate, but the rest of them were less interested in that” (CT2). However, note that the teachers indicated that the shared decision making and delegation was only sometimes, and that the structure was still a clear hierarchy. Furthermore, the teachers did not use delegation or shared decision-making in class, but rather tried to get some opinions that they could use to potentially change the teaching techniques used: “In my class I try to adapt my methods to the students, because I see they’re at different levels of skills” (CT1). The students seem to believe that the teachers are not open to changing their techniques, or at least rarely consider the opinions of

students in terms of how they run their classrooms. This can be seen from comments such as the following:

Some of my teachers are positive, encouraging, and supportive and they like to hear our opinions and ideas. Most of them are just focused on teaching the stuff we need to know for class. I know I haven't received much support from my teachers. Since I'm a good student they like me, but they're usually only interested in keeping us quiet and paying attention in class and testing our knowledge with exams (CS1);

"Our teacher's main role in class is to teach us and test us with exams" (CS2). Similarly, the students do not believe that the teachers have much cooperation or shared discussion among each other, and believe that the principal's shared discussion approach is limited to the teachers (i.e., the administrative level directly below principal): "Our principal likes monitoring what's going on the whole time. Usually she walks around the school, looks to see what people are doing, and such. We think she's too serious, but that's all we've ever seen." (CS2); "I think our teachers' committee is focused only on their own field. So, the math teachers get together in their group and talk about how to teach us math better" (CS1).

For the Transforming Structures dimension, it was clear from all of the comments that the school operates using a top-down structure but the principal wants to make it more open and distributed. For example, the principal commented on a desire to get opinions from students as a way of improving the school: "my office door is open for all students and staff. I'm happy to hear from them, it's an important part of my responsibility" (CP). The students are aware of this possibility, but do not want to use it:

“Yeah, we can visit any of those people [i.e., teachers, vice-principal, or principal], but I don’t want to transfer my problems to the principal” (CS1); “New or bad teachers are a common problem for us, but I don’t like to talk with our school principal about it. I think she just has to tolerate them” (CS1). The last comment is particularly interesting, because it suggests that the students believe they cannot improve the situation of their school. The students cannot share their opinions about how the school is functioning with the principal because it will not make a difference: the principal cannot change the teachers, so if the teachers are the problem, and he or she cannot do anything about it, then the students cannot do anything about it either. This is a common problem with vertical organization structures, where information cannot travel effectively between layers or the power necessary to make changes to the structure is too heavily centralized at the top of the hierarchy. The teachers agreed with the students regarding the vertical structure of the school: “Decision making is a difficult issue to analyze. In my school, based on your description, our principal uses a top-down approach and I think it would be around level five [for Tannenbaum and Schmidt’s theory]” (CT1); “As I previously mentioned, I don’t think we have a democratic style of administration. Given your description, is there a level between four and five? I think that’s where our school fits” (CT2). The students agreed with the teachers about the structure of the school: “I think we have four levels of administration: a principal, his vp [vice-principal], teachers and then the students. These levels are ok” (CS1). However, the students believed that the teachers were using an approach even more vertical in nature than the principal: “The responsibilities for my school include monitoring students, to see if we’re present or absent, and teaching. My teachers never talk about improving our behaviour, we just learn new ideas and some



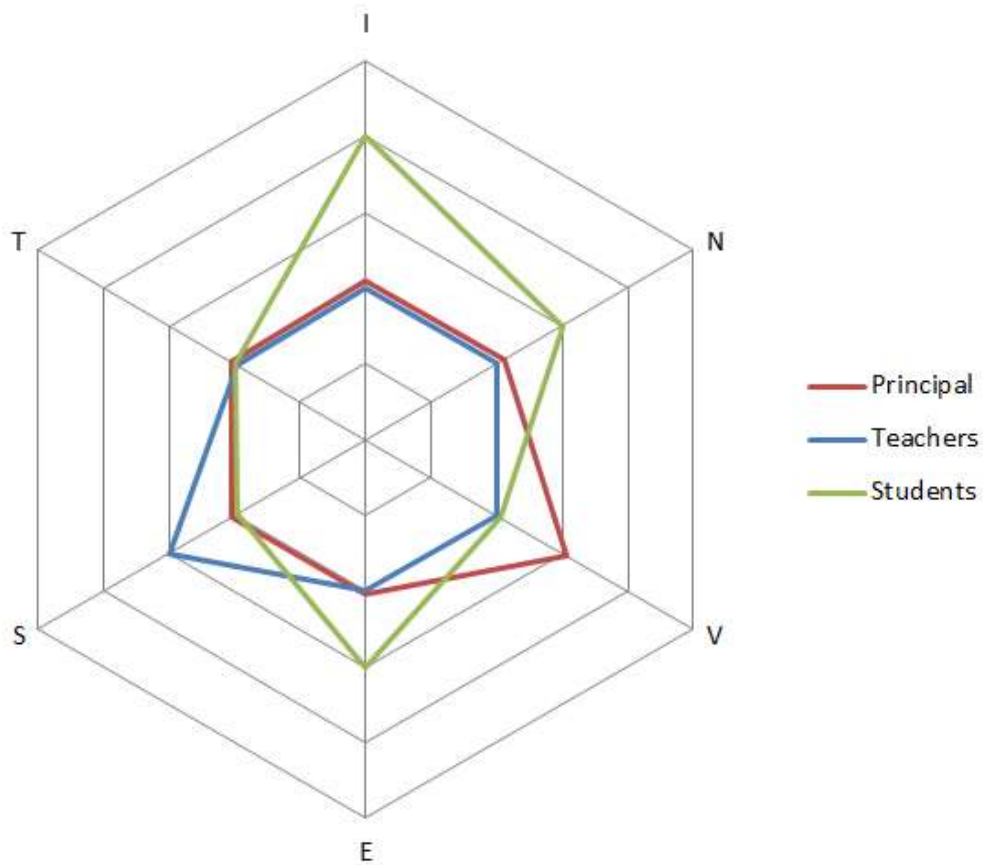
skills” (CS2). This suggests that, from the perspective of the students at least, the school structure is highly vertical and inflexible, with little they can do to influence or change it. If this is true, that situation is very problematic for the school; the students are the ones who are ultimately supposed to benefit from the schooling so they should have the most power to indicate when something is wrong, even if they are not the ones to make changes or decide what changes should be made. However, if the students are incorrect about the situation of their school then this is also a problem, because it means they cannot exercise their ability (however little it may be) to improve the school since they do not realize that such an ability exists.

*Scoring and analysis for Turkish school.* The INVEST scores for the Turkish school can be seen in Table 5.13 below and a comparison of the scores is shown in Figure 5.3. From the comments of the participants, it seemed that the principal and teachers did not have high motivation for continuous learning other than merely teaching students. On the other hand, the students were more motivated and experienced a higher degree of enhanced learning than the principal and teachers. However, the students believed they did not receive supportive management from their school or in their classrooms. This suggests the fundamental reason for high motivation of continuous learning in students may have been cultural in nature (i.e., the family aspect of Turkish culture influencing desire for learning in the children of a family). The potential influence of family will be discussed in the next chapter. In the rest of this subsection, the score for each INVEST dimension of the Turkish school is analyzed in more detail.

Table 5.13.

*INVEST scores for the Turkish school*

Dimension	Principal Score	Teacher Scores	Student Scores
Inspired Learners	3-4	3-4	6-7
Nurturing Culture	3-4	3-4	5
Vision for the Future	5	3-4	3-4
Enhanced Learning	3-4	3-4	5
Supportive Management	3-4	5	3-4
Transforming Structure	3-4	3-4	3-4



*Figure 5.3.* Comparison of the INVEST scores for the Turkish school, using data from Table 5.13.

For the Inspired Learners dimension, it seemed that the principal had limited interest in learning but suggested that this was because of his own lack of time and not

because he thought being inspired to learn was bad: “My motivation is my job. I have many responsibilities here, so I have to work hard to fulfill them” (TP); “Having a higher income is a motivator for many people, but I believe the results of our actions are much more important” (TP). However, the principal seemed to think that the teachers would not improve themselves unless he was somehow involved: “The teachers in this school know their responsibilities. However, I have to monitor the quality of teaching that occurs here so it remains high” (TP). It would seem that the principal believed he could encourage teachers to become better, or to improve their own learning, as a result of him monitoring their behavior and results. However, others comments of his, discussed under supportive management below, suggest that he believes he has too little time to support teachers in their learning. The principal’s monitoring then is likely an example of transactional leadership, in which he looks for opportunities to punish or reward the teachers, and thinks that will improve the quality of their teaching and maintain their motivation to teach well.

Responses from the teachers suggest that these efforts from the principal are unrelated to why the teachers are motivated or why they want to improve themselves: “I like my job. That is a reason for my motivation” (TT1);

As a teacher, self-improvement is necessary and we try to learn new methods for teaching. I teach in a highly-ranked school and have to develop my knowledge. I believe learning is an important factor for our job. However, many teachers don’t have enough time for other activities, so we just focus on our specific fields [teaching subjects] (TT1).

As can be seen in those two quotes, the teachers realize it is important for them to be continually learning to improve themselves, but it is because of their school's reputation. Also, this teacher seems to think that he does not have enough time to properly improve himself, just like the principal, and instead focuses only on knowing more about his own subject area. The other teacher is interested in learning but in the sense of how to better convey his topic area because of how sensitive it is for students:

I studied theology at university and I have a sensitive responsibility in this school because almost all of the students and their parents are secular. I have to carefully teach and introduce Islam to them in a logical manner. So, for example, I ask some questions about the universe then bring in related theological questions like 'Who created this universe? Why?' To support these ideas, I bring some quotations from the holy Quran and then I continue the discussion (TT2).

Although the teachers and principal acknowledge that continual learning is important, their lack of action in creating a systematic and structured method for continually learning is problematic both because of how it hampers their ability to create a learning organization but also because it goes against the proficiency aspect of Leadership by Islam. They may be proficient currently in their teaching, but they need to spend effort learning in order to improve their proficiency. Furthermore, it is questionable how much TT2 is following the Justice aspect of Leadership by Islam. It is clear that he is concerned about the students' opinions and the interests of their families, but this concern seems focused on what will make it difficult for them to accept Islam rather than have a conversation about it. In other words, in trying to teach Islam it seems that TT2 is more interested in conversion than just transferring information. For classes on religious topics

though this is usually a difficult balancing act, but is even more important for people trying to use a Leadership by Islam approach.

The students also seemed to be highly motivated to learn: “I would like to go to medical school. So, I concentrate on my courses and just study my schoolbooks. This goal of entering medical school is encouraging for me” (TS1); “I’m responsible for learning new knowledge and skills” (TS1); “My school ranking is perfect because it’s between three high-ranking schools in Turkey. Therefore, we have to study, study, study” (TS1); “My school is the best school in Turkey! I entered here with a good situation since many students’ dream to come here. I’m a lucky person to be here” (TS2). However, these quotes suggest that the students are motivated to learn because they believe the school’s reputation can provide them with a better job in the future. However, the students’ family is also a source of motivation: “I would like to learn more by myself but my parents, and my brother who is a medical student, help and guide me with my school work” (TS1). As such, the students have a high score for being inspired learners, not necessarily because of any particular action from the teachers or principal but because the students can benefit from the school’s reputation and are encouraged by their families.

For the Nurturing Culture dimension, again the scores were similar across the teachers and principal to suggest that such a culture exists but only in a very limited way. In particular, the teachers suggested that they did not spend much, if any, time supporting each other in their learning: “we have group learning activities based on subject. Since I teach mathematics, all discussions in my groups will be about math. However, we introduce new books, ask questions about our subject, and even sometimes use brainstorming” (TT1); “My field, Theology, is different from that of other teachers. I’m

alone in this school for my topic [i.e., I have no learning group at this school]" (TT2).

Notice that the group support is divided by subject area, hence why TT2 has no group with which to learn in the school. Although such a division is better than no group, it means that there is no structured space for open and serious discussion about cross-subject issues (such as general problems within the school). The principal also seems only interested in the subject-area discussion groups, and does not want to try anything more: "group learning can happen with teachers and students. For instance, teachers could form a group to talk about mathematics, so they can learn math together and discuss their opinions" (TP); "[Whether there is a plan for group-based learning] depends on how much time is available, but there are already some groups based on different fields and they free to improve those groups and learn together" (TP). However, it seems that group learning is limited for the students: "I like to use discussions and brainstorming in my classes, and want to develop this further" (TT2); "I don't like to talk about my opinions in class; my duty is learning, hence, I am serious about it" (TS2).

Other than group learning though the students seem positive about their environment:

Teaching is very important here, because if we get low marks then we can't stay in this school. Our environment is safe and I have good classmates. We have to follow this school's expectations for us and we never talk about it, even in terms of teachers. ... I don't like to discuss with my teachers in class if there is a problem. I prefer to talk to him/her alone (TS1)

Since the students believed they had a nurturing environment, their score was higher than what was given for the teacher and principal. It is important to note that the students felt their environment was nurturing because they needed to work hard to remain in the

school and they could advance well provided they followed the expectations given by their teachers. Again, this sounds very much like a transactional leadership method, whereby the students are following the rules outlined by the teachers and are working hard to avoid punishment. In the case of the interviewed students it seemed to be working for them, but it does mean that the school's structure is not very conducive to transformative learning nor to empowering students to take on a self-directed learning approach.

For the Vision for the Future dimension, it was clear that the principal was confident their school had a strong and appropriate vision: "There is a plaque on my office wall, and our vision is written on it. This is an old and famous historical school, so we've had a clear vision from a long time ago" (TP); "I'm sure this vision is clear for everyone. There's no doubt that the staff and teachers know about it" (TP). However, it was also clear that he had no intention of allowing it to change, feeling that such a change was unnecessary: "This vision is for the past, present, and future. The main focus is the responsibility to teach students" (TP). As will be discussed in Transforming Structures below, the unwillingness of the principal to change the vision means he is perpetuating a highly inflexible organizational structure. Although the goal of 'teaching students' would presumably be always part of the school's vision, that does not mean other parts of the vision cannot change. For example, students can be taught using passive or active learning, and the vision could be changed from one to the other without needing to change the goal of teaching. It seems the principal is uninterested in improving the vision of the school.

Furthermore, the students and teachers did not agree with the principal regarding the 'vision' of the school: "I haven't seen a clear vision about our school" (TT1); "[the vision in the principal's office] is about our school's history. We know we must teach our students well, because they have difficult competition for being accepted in a high-ranking university" (TT1);

I think my vision for my teaching work is more important [than the school's vision] because a majority of these students are from secular families. Hence, I have to teach them religious issues with a language that they can understand. This is my vision, and I think the school's vision is the same: developing an Islamic approach to education (TT2);

"Some teachers informally talk about our future, but it's not a vision. That is just something to motivate us to study harder" (TS2);

Even if I didn't see or read about our school's vision, I believe I can study well and continue my education in upper levels. I think other students justify this option for themselves. I have some close friends and we discuss about our future, but this vision belongs to us (TS1);

"Yes, we studied [the plaque in the principal's office that he said is the vision], but it's just about the history of this school" (TS2). Since the students and teachers do not believe their school has a vision, they started creating and using their own vision for the school. This is still a problem because it means they cannot coordinate their actions to support each other in achieving that vision. In particular, students who have a vision regarding a particular degree or job may not get the appropriate support from teachers because the teachers are unaware of this vision.



For the Enhanced Learning dimension, the principal and teachers were using a rather traditional approach to learning (i.e., dictating content to students) and managing behaviour of students (monitor them, use written exams, punish when necessary): “I monitor everyone’s activities in this school [pointing to a computer monitor]” (TP); “Teachers can monitor the behaviour of students, and especially their success, using different methods like an oral or written exam” (TP); “I don’t think all the teachers here use a systems approach, but that is a good method for education” (TT1);

I believe our teachers are like everyone else ... They teach courses and we have to submit our assignments on time. ... But students are different. We have a lot of competition between us, so we have to study hard every day and every time (TS1).

One aspect of enhanced learning is how well the students use the resources available to them. Although the participants noted that the resources were good, they also indicated that the students rarely use them: “Our computer labs are good, and our library is excellent. All of our students, teachers, and even staff can use those” (TP); “We have a good library in this school. All of the teachers, staff, and students are welcome to use it. However, most of the time our library is empty” (TT1); “Our school has a wonderful library, but many of the subjects are old. Students prefer to study in their home, but if there are group activities then we work in the library” (TS2). Since the students do not use the library and its resources, they are also unlikely to be engaged in self-directed learning. If they study at home, that also means they are getting more support from their family for school work than anything at the school. Another aspect of enhanced learning is whether the teachers are mentoring the students or using more active learning

approaches. Although it seems as though the teachers offer that kind of support, the students rarely take advantage of it: “Giving advice or training students is part of my job. Actually, I’m not really able to focus on all the needs of my students, but I would like to help them” (TT1); “I train my students both in and outside of class, though it is of course only within the school itself” (TT2);

Our teachers have time for us after class, but I prefer to solve my problems [for school assignments] by myself. For some minor issues I went to a teacher’s office. I prefer to talk with my family about my goals though, because I believe they can help me better than anyone else, even my teachers. My teachers just teach courses, even though I believe they want to teach us well (TS2).

These comments also indicate that the teachers are engaged in traditional, passive learning techniques rather than trying more active techniques. In addition, since the teachers are not developing critical thinking or metacognition in students, they are only using at most the third level of bloom’s taxonomy. The teachers are also not using critical pedagogy, given how the students mention that some of their teachers are not open to new ideas and that they are unwilling to have discussions with their teachers in class.

For the Supportive Management dimension, the principal’s comments suggested that he was not offering much support to the teachers or students even though he seemed confident otherwise: “I’m too busy of a person [to help teachers in their own learning and personal growth], but I would like to help my staff and teachers learn and improve their ability to learn” (TP); “I don’t [suggest books for my teachers to read], but it’s a good idea.” (TP); “I give all of my colleagues an opportunity to come up with their own ideas, and I support this process. However, as I told you, I’m the one responsible” (TP). The

students seemed to agree with this assessment of the principal's comments: "Students are responsible for studying, and teachers are there to make us learn through assignments, exams, and oral evaluations" (TS1);

We [students] aren't involved in any decision making, the teachers don't involve us in that. Like I said before, our school doesn't use metacognition, collaborative learning, or any of those. At the same time, I don't like to give suggestions for my school because some of our teachers don't want to hear about new ideas (TS1).

These comments also suggest that the decision-making style used by in the school is largely focused on single individuals (the principal when talking to the teachers, and the teacher when talking to the students). The teachers likewise agree that the principal makes all the decisions, and does little to no delegation: "Delegation of authority is a touchy subject. Our school's principal prefers to be the first one to handle major issues" (TT1); "The teachers and staff in this school know their responsibilities and what is expected of them, but our principal also monitors us and deals with any conflicts or problems that arise" (TT2). Despite what the students said, the teachers thought they were open to new ideas: "Absolutely, we would like to hear ideas and opinions from students" (TT1); "I have to try and encourage discussion among students and encourage them to participate in these discussions" (TT2). The teachers seemed to think that the principal was supporting them, offering them good opportunities for making their own decisions, and that they were supporting each other.: "Our teachers are interested in hearing new ideas, and like to try out new approaches" (TT1); "Trust is an important factor for our job. Teachers and staff know their responsibilities and they try to do them" (TT1);

In my opinion, our principal is a positive and open-minded person. He even receives my suggestions about candidates for new teachers to hire. When he's going to have a meeting, he first asks for opinions and information from the teachers and staff then uses that for his discussions (TT2).

Since the scores are based on the opinions of the participants, these comments give the teachers a higher ranking for supportive management even though the lower rankings from the principal and students are likely more accurate of the overall situation of the school. However, it seems that even if the teachers think they are getting extra support, and listening to others' opinions, they are not engaged in active learning techniques nor are they reflecting on their own teaching:

I like to reflect on the mental models I have, but this is hard to do. I don't even have enough time for personal activities and hobbies, or visiting with friends, because of how much time my classes, family and especially my children require. My Turkish culture encourages me to focus on work and family, so I don't have much time to think about my mental models (TT1);

"No, we do not have [metacognition, collaboration or critical learning] in our schools" (TT1). Furthermore, the lack of delegation and openness to others' opinions leads to a level of three, at best, in the T&S continuum for the principal and teachers.

For the Transforming Structures dimension, all of the participants agreed that the structure of the school was very hierarchical but also seemed to feel this is either an acceptable state or something that cannot be changed easily given their current situation:

"Again, delegation of authority is a hard topic. I believe the teachers are well experienced, so they know what is expected of them. Sometimes we talk about their

objectives, but it's not a general discussion" (TP); "Of course, students are free to visit their principal, and talk with him about any subject" (TT1); "the structure's fine. Our school doesn't have unnecessary people, though the learning part starts with the teachers and ends with us" (TS1). However, the students do not want to talk to others, neither the teachers nor the principal, so communication between the levels of the hierarchy is quite limited: "Students are free to visit the principal's office and talk with him whenever, but I prefer not to do that. I think I can solve my own problems, without using his method" (TS2); "I don't like to have general discussions with my teachers in class. ... I think some of the teachers don't like to have discussions, and many of them don't seem open to our opinions anyway" (TS1). This last comment is also particularly important because the students believe that some of the teachers are not open to new ideas. This suggests that the structure of the school is not only highly vertical but also very inflexible. With such a structure and the corresponding attitudes of the participants it is very difficult to properly implement a participatory approach, since the students cannot engage in the discussion about how the school should function, or a contingency approach, since the teachers and principal need to adapt the school to the current circumstances. As both of these approaches are relevant for Leadership by Islam, this school is likely to face difficulties of where they are trying to follow that leadership style but have been unable to do because of how the structure currently operates.

*Scoring and analysis for Iranian school.* The INVEST scores for the Iranian school can be seen in Table 5.14 below and a comparison of the scores is shown in Figure 5.4. The teachers at this school believed they need at least two jobs to support their cost of living, and that negatively affects their ability to teach. Additionally, the students

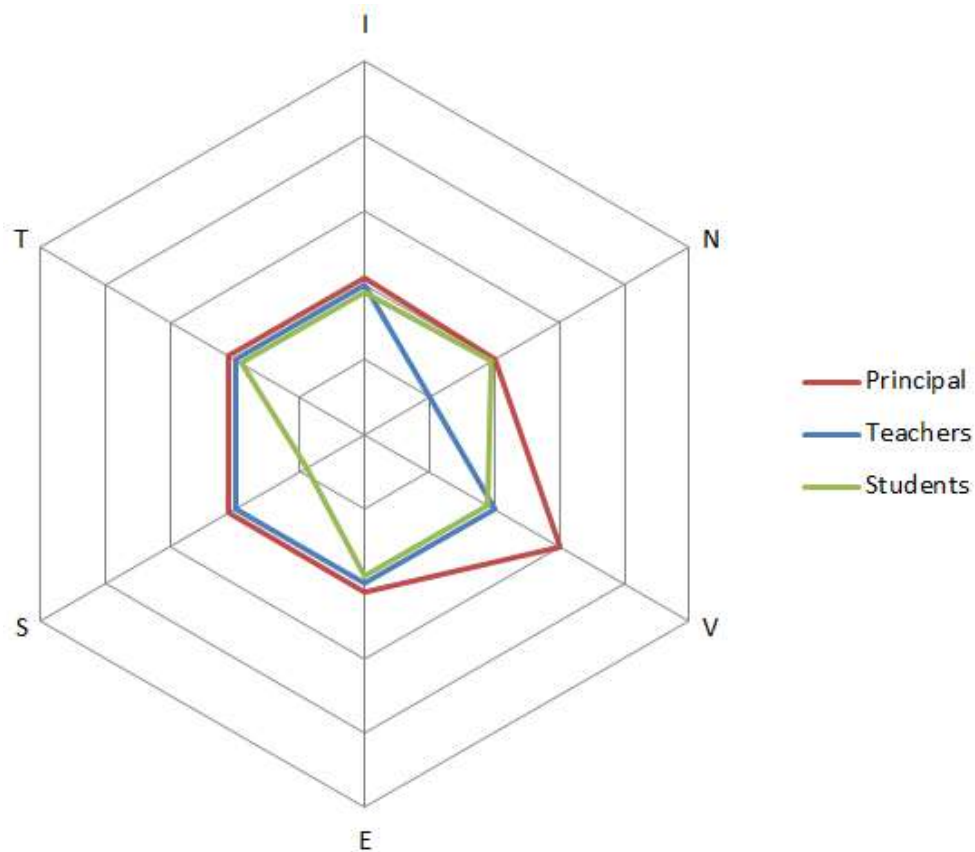
suggested there was poor support from the teachers or principal in their school, most strongly noted in how they compared their school to a prison. Since all of the elements between participants are rather weak, this suggests the Iranian case follows a poor learning organization model. However, the comments suggest this poor state exists in all levels of ministry of education and is common in other schools not only theirs. In the rest of this subsection, the score for each INVEST dimension of the Iranian school is analyzed in more detail.

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Table 5.14.

*INVEST scores for the Iranian School*

Dimension	Principal Score	Teacher Scores	Student Scores
Inspired Learners	3-4	3-4	3-4
Nurturing Culture	3-4	1-2	3-4
Vision for the Future	5	3-4	3-4
Enhanced Learning	3-4	3-4	3-4
Supportive Management	3-4	3-4	1-2
Transforming Structure	3-4	3-4	3-4



*Figure 5.4.* Comparison of INVEST scores for the Iranian school, using data from Table 5.14.

For the Inspired Learners dimension, all of the participants were around the same in score and gave similar comments about wanting to teach and learn new things:

In the education system we have to improve our knowledge. Actually, students are so fast with learning new things that we have to keep up sometimes. Students have many sources for learning information, such as the Internet, computers, satellites, friends, and so on. These sources are also available for teachers and principals though. (IP)

“I believe the education system of a country is important for developing a society. Hence, that is reason enough for learning and teaching” (IT1); “My motivation is myself; I am a

sports-teacher so I have to improve my knowledge, because students can improve their knowledge through the Internet, computers, and other such sources” (IT2); “Some teachers want to design a future for us, with and without a university degree involved, so, that can be motivating” (IS1). At the same time though, all participants gave reasons for why they were unable to engage in various forms of learning: “Self-improvement is a good method and necessary for education, but in Iran the teachers and other staff have many economic problems. For them, the first step is to handle their cost of living” (IP); “Unfortunately, many teachers in Iran believe their responsibility is to teach their course for the allotted time, about one hour, and that is it” (IT1); “I believe nearly all teachers don’t have time and motivation to study other subjects; they just study or review their instruction books” (IT1); and especially:

I am sorry to say, in Iran teachers have many problems but one of them is a financial problem. So they don’t spend enough time for learning, and definitely not for group activities. Even now, teachers have to work in two or maybe three jobs, and majority of them believe this job [their job as a teacher] is just something to keep while they grow older because it has a pension and insurance.  
(IT1)

The students were likewise less motivated: “I’m motivated by goals for my future, like a university degree and a good job, but I know that even with a university degree we [students] will not be able to find job” (IS1); “Our teachers teach well, but only one encourages us with a positive attitude and kind behaviour [for all the students]” (IS2); “Many teachers in our school don’t teach very well, and they invite students for private tutoring classes that they run on the side” (IS1); “Our teachers teach a course and we



have practice by doing assignments. We never enter a class knowing what the topic will be. Sometimes we have an opportunity to learn from our mistakes, but we often lose marks this way” (IS1). These comments are significant for showing that the motivation of students is less of a problem than an overall depression about the state of affairs for their future and wider society. The teachers cannot help with this motivation because they are also depressed for the same reason. Furthermore, the interest in learning is focused on traditional learning (i.e., passive learning). It is possible that, had the teachers been using at least critical pedagogy, the students may not have been so depressed because they would more interested in ways of improving their society rather than feeling like they have little hope for the future.

For the Nurturing Culture dimension, the principal suggested that teamwork would be good but the students and teachers say that teamwork is rarely used:

Our school is a place for research. Actually, I’m able to do research as a principal in this area. As a case study, for example, some teachers get together and discuss a specific problem they have like a student’s behaviour, material to teach, and so on. This is what we’d call teamwork (IP);

“We don’t have group activities in every class, and of course the school principal is 100% against it. Some of our teachers are positive about it, but my classes we’ve only had them once or twice” (IS1);

In Iran we have a cultural problem, because students don’t understand the purpose of teamwork. Also, students stay in teams when they are weak or lacking; if one person thinks they know enough, even a small part of the needed knowledge, then they prefer to work alone. (IT2)

When teamwork is rarely available, especially among students, then a nurturing culture can be very difficult to create. IT2 recognized this when commenting on the problem of not having students understand the value of teamwork. In addition, the participants indicated that brainstorming, as a method for sharing opinions, was a good option but difficult or rarely used: “[Brainstorming] can be a good method but we don’t use it. On the other hand, in our society there are some things we can’t share our opinions about and other times we cannot talk about our opinions at all” (IS1); “I like it when I hear that someone has done brainstorming, but it’s not a regular method in our education system” (IP). Since sharing opinions is difficult to do, and the students have difficulty working in teams, the nurturing culture cannot be particularly good. It also means that active learning methods like co-learning, critical pedagogy, and metacognition cannot be used; those methods require some degree of teamwork and sharing of opinions. As such, the teachers are probably using a typical passive learning approach. This is confirmed by comments from participants: “The biggest problem is the diverse number of schools [high schools] in the Iranian education system. [...] This means nearly all of the students in the public schools (with some variation of neighbourhoods) are from poor families with limited education” (IT1);

Before the Islamic revolution students with different levels of skill and knowledge had to stay in the same classes. Thus, a smart student could play an important role in learning through answering questions. When teachers encouraged these smart students, other students would like to copy them. Now though, all students are classified ‘smart’ and the rich students would prefer to go to private and

Tizhooshan schools. This means students who are from poor families have to stay in a public school with similar students (IT1);

“Our school’s policy, like other schools, is to teach subjects that are important for the Konkour [the university entrance exams]” (IS2).

For the Vision for the Future dimension, the principal was confident that the school had a good vision available and that everyone is familiar with it: “there is a vision for this school. It’s available in my office here, but also the office of the [vice principal]” (IP); “I think all of the staff and teachers already know the vision for our schools” (IP); “it is the teachers’ responsibility to give [information about the vision] to the students” (IP). However, the students and teachers thought the vision was unclear or missing and instead they looked to their own idea: “I have not heard about our school’s vision, but I believe teachers have to teach and assess students very well. I could not find anything about our school’s vision on the Internet either” (IT2); “in Iran we have different types of schools, each of which have different visions for their students” (IT1); “we use a hierarchical model. As I previously mentioned, teachers don’t know enough about our vision so we can’t transfer this information to students” (IT1);

Our teachers give us different assignments and one of them is an oral exam. ...

We learned we have to follow what the teachers want 100% for this type of exam, and then we’ll be able to pass the Konkour. Perhaps that can be the vision for our school (IS1);

“I haven’t seen or heard about my school’s vision. I don’t think other students know about it either. But I know the number of students who pass the Konkour exam is important for our teachers and principal” (IS2). Although the students want to have their

own vision, they seem convinced that the only vision for the school is to enable students to pass the Konkour exam. This means the teachers are only using up to the ‘apply’ level of Bloom’s taxonomy and specifically looking at application as it relates to the Konkour exam. However, this also means that the teachers are likely focused on the most efficient way of learning to pass the exam, rather than using more active learning approaches like critical thinking or critical pedagogy since they may not directly result in knowing how to pass that exam.

For the Enhanced Learning dimension, all types of participants were generally in agreement that there were only a few aspects of enhanced learning being used and that teamwork in particular was weak. For instance, the library and computer technology available could be quite beneficial to enhanced learning but only if used: “We have a good library and computer lab, but our teachers and students don’t regularly use them. The computers, and especially the Internet, are used the most” (IP); “one of the ways to develop [knowledge] is through having a good library and laboratories. Both of them are in our school, but neither of them are used by the students or teachers” (IT1); “We have a library that the students elect a librarian for. I don’t like going there, and other students are like me. However, during exams we have to go there because it’s the best place to study together” (IS2). Since the students rarely use the library this seems to support the idea that the students are not being empowered to do self-directed learning, and instead are only focused on learning specific material. However, the students are also getting help from private classes and from family: “I have a strategy for handling my courses. I pay attention in class and learn there, and then I continue studying the material outside of class. My parents often help me with studying at home” (IS1). Another possibility is that

the teachers could be acting as mentors for students, but this is not the case. The teachers may be unfamiliar with how to properly mentor students but, as in the Canadian case, the teachers have too little time to do any mentoring: “In my school, teachers do not use a mentoring method. This is because many students and teachers don’t know what mentoring is, and they have not been taught this either” (IT1); “We don’t have a systematic approach to our education. Teachers have a second job, and many have a third” (IT2);

Any enhanced learning that happens depends on students, because our teachers are teaching all of the students. They don’t have enough time to work with each person. Our classes have roughly 30 students, and for a 90 minute class that gives only three minutes for each person! So, we have to enhance our learning outside of class (IS2);

“In my school, mentoring, a systems approach, or other methods like that are not practiced” (IS1). All of this suggests that the Iranian school will have difficulty supporting their students with higher quality of learning, but since the main focus is on passing the Konkour exam and using a traditional passive approach to learning they may think their school is acceptable. The principal at least seems content with the current system: “We have an assessment system, which teachers and myself can use, that manages the students. For the final marks, I have to monitor them and make sure they are consistent with our guidelines” (IP).

For the Supportive Management dimension, the principal and teachers were in agreement that a small amount of support was available but in a very limited format. In particular, the structure of the school was quite rigid hierarchically speaking. The low

scores were based on comments such as: “I prefer to make major decisions, but I collect suggestions from others. So, I make the decisions but I use my knowledge and the knowledge of my colleagues” (IP); “I trust my colleagues, but since I’m the one who is responsible I have to consider all the sides of a decision” (IP);

our education system follows a very hierarchical system. Any new ideas we get are supposed to be from a higher level. So, our principal is not open to new ideas from his staff or other teachers because that’s what is expected of him: to follow the role given to him (IT1);

[the teachers] know [our principal] has to follow the role he’s given. His trust for us varies depending on the activity ... I don’t think administrators in general help other teachers and staff to improve their skills or knowledge, but this is because they aren’t told to do by the higher levels of the education system. (IT1)

The students were also in agreement: “Our education system is quite traditional. It’s almost the same as for my parents, and even my grandparents: teachers teach the material and students practice it and do assignments” (IS1); “I think my parents had a better situation for learning. They could find good books on the black market. We have the Internet and cellphones, but students just memorize the material” (IS2); “I think our teachers are interested in new ideas and want to hear from us, but the students aren’t interested in that. Maybe the students never learned about this” (IS1). Having a hierarchical organization structure that is focused on traditional performance metrics is consistent with the earlier comments about using exams and passive learning. In addition, as shown from other comments, the teachers and principal are using only level three of

the T&S continuum. Since this does not require significant critical discussion for decision making, the leadership structure is using the same approach as the teachers in their classrooms (i.e., they are not teaching critical thinking in their classes and are not using it in the decision making of the school either).

For the Transforming Structure dimension, it was clear from the comments that the school used a top-down structure and had limited communication and cooperation between different levels and groups of individuals. For example, the following quotes show the limited cooperation that occurs:

Teamwork between students would be good, since it's a more active learning approach as you previously mentioned, but the quality and effectiveness of this strategy depends on the teachers. Team activities can be hard sometimes for Iranians, especially Iranian students, but I believe we have to improve this and create a better relationship between students and teachers (IP);

“Teamwork exists in our education system symbolically, but we are very unsuccessful in how it is applied” (IT2). Similarly, there is limited communication between the levels of the organizational structure:

our principal never encourages or asks us to learn new things. I think we talked about this already; the principals have to follow the rules given to them from Tehran [Iran's capital]. Because of how centralized the education system is, principals, teachers, other staff and even students are limited in what they can do and how they can develop regarding their responsibilities (IT1);

“Students don't like going to the principal's office. However, his door is open for us whenever we want to speak with him” (IS2);

I don't have enough information about the different levels of administration in our school. However, I don't think there's much control over our teachers' activities in class. For example, for the last two years our mathematics teacher hasn't taught us well at all. To get a better understanding of the material, my parents have to pay him money so we can attend his private lectures outside of school (IS1);

"Our principal is a supportive, encouraging, and open-minded person. His goal is to increase the number of students who can pass the Konkour exams" (IS1). Note that this last comment from a student suggests that the principal wants to hear new ideas, even though the teachers say otherwise, but at the same time the student is clear that focus for the school is only passing the exams. These comments about the organizational structure of the school also show how difficult it is to implement a participatory or contingency approach, which is particularly important for this school which is trying to follow Leadership by Islam. The students are unable to provide comments that are meaningful to the operation of the school, so they cannot participate in how it functions. Similarly, the principal cannot change the operation of the school to match the local circumstances or to respond to concerns from the students or even teachers, since he has to follow what plans have been developed from the country's capital (i.e., the principal cannot use a contingency approach).

### **Integrated Analysis**

This section contains the same data as the previous sections, but is arranged and analyzed such that comparisons across the cases can be conducted.

*Principals.* In Table 5.15 and Figure 5.5 below are comparisons of the INVEST scores of all the principals as well as their level for the T&S continuum. As can be seen



in those tables, the Turkish and Iran principals had the same scores and the Canadian principal scored slightly higher on all areas. In other words, the Turkish and Iranian principals behaved similarly with respect to their method of leadership in the schools. The similarity also came through in the other scores (three characteristics and five principles). Such similarity is particularly noteworthy since the Turkish school is a highly ranked public school but the Iranian is not, it is a typical public school for lower-socioeconomic students (as the Iranian teachers mentioned, mid- to high-socioeconomic students would go to higher ranked and speciality schools). It is also significant that, although the Canadian principal was always higher than the other two, the only area where he scored two steps higher was in Supportive Management. This suggests that, despite the opinion of all principals that they support their staff, only the Canadian principal was willing to use a less rigid/hierarchical, and a more open/democratic, approach to managing and supporting his staff. This approach is also seen in the Canadian principal's higher ranking on the Tannenbaum and Schmidt continuum.

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Table 5.15.

*Comparison of INVEST and T&S scores for the principals*

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Dimension	Canada	Turkey	Iran
Inspired learners	5	3-4	3-4
Nurturing culture	5	3-4	3-4
Vision for future	6-7	5	5
Enhanced learning	5	3-4	3-4
Supportive management	6-7	3-4	3-4
Transforming structure	5	3-4	3-4
Decision making as per T&S continuum	5	3	3

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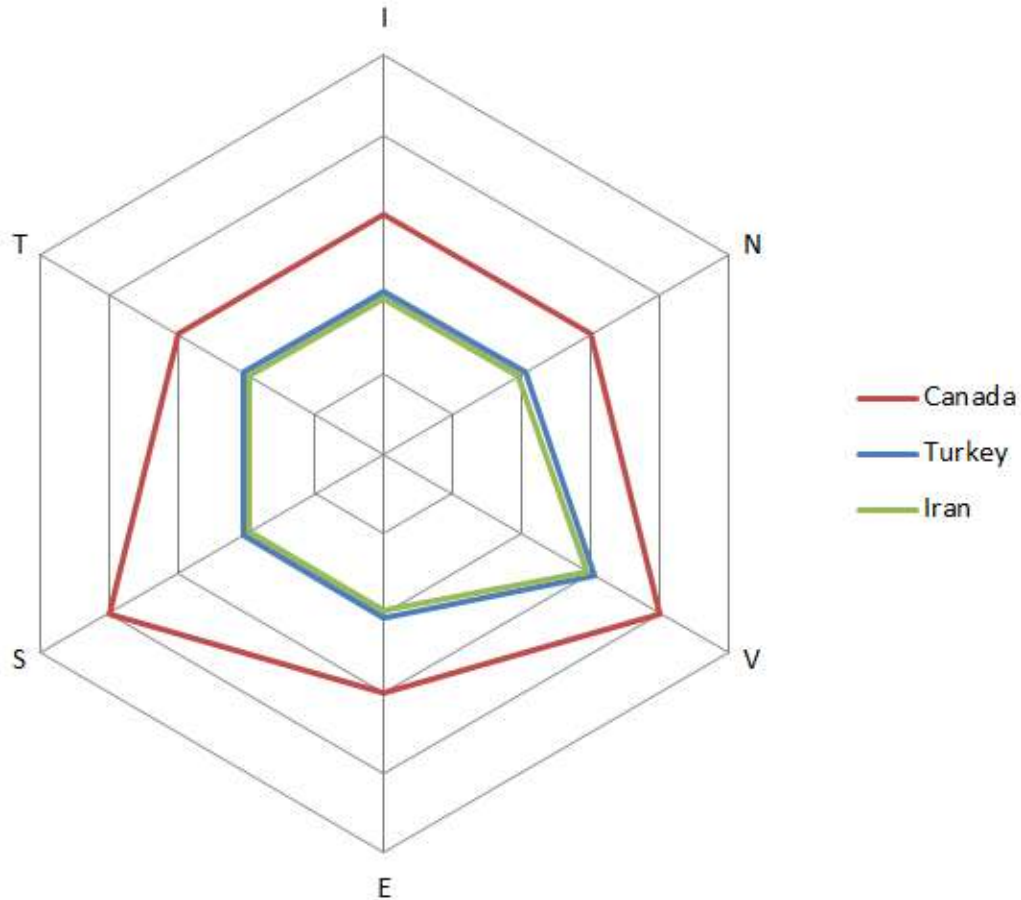


Figure 5.5. Comparison of INVEST scores of principals, using data from Table 5.15.

**Teachers.** In Table 5.16 and Figure 5.6 below are comparisons of the INVEST scores of all the teachers as well as their T&S ranking. Again, we see a similar pattern in that the Canadian teachers are ranked higher than the Turkish or Iranian teachers. However, unlike the case with the principals, the Canadian teachers are the same as the Turkish teachers for Supportive Management. Furthermore, all of the teachers ranked the same (a score of 3-4) for Vision for the Future. This suggests that, again despite what the principals may think, none of the schools were effective at conveying the vision chosen by the principal or school board to the teachers. All of the teachers also ranked the same (a score of 3-4) for Transforming Structure. This suggests that, although they may want to support and encourage their students, and may try to work in a less hierarchical

manner, they are still all unable to engage in practices that would transform how they interact with students. In other words, all of the teachers have roughly the same attitude towards the hierarchical structure of the school (how they relate to each other, to students, and to the principal) regardless of the country. This is important given that the Canadian teachers ranked quite highly on the T&S continuum, which suggests they were far more willing to work with each other and consider opinions of the students when deciding how to organize and conduct their classes. Lastly it should be noted that the Iranian teachers received the lowest score for Nurturing Culture. In other words, they had little desire or ability to empower and support their students in areas of personal growth. Given their comments on their financial difficulties and lack of time, this low score makes sense. However, it is likely more widespread than just the interviewed teachers given that the Iranian students mentioned similar issues.

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Table 5.16.

*Comparison of INVEST and T&S scores for Teachers*

Dimension	Canada	Turkey	Iran
Inspired learners	5	3-4	3-4
Nurturing culture	3-4	3-4	1-2
Vision for future	3-4	3-4	3-4
Enhanced learning	5	3-4	3-4
Supportive management	5	5	3-4
Transforming structure	3-4	3-4	3-4
Decision making (class management) as per T&S Continuum	6	3	3

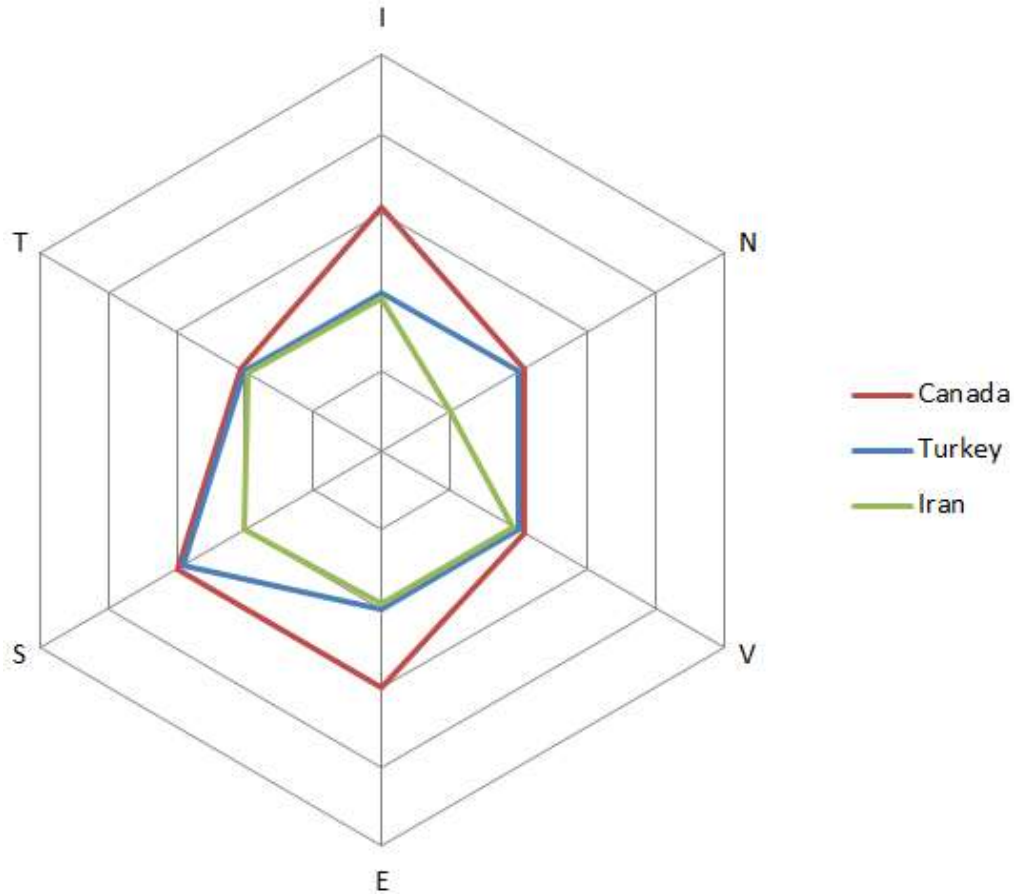


Figure 5.6. Comparison of INVEST scores of teachers, using data from Table 5.16.

**Students.** In Table 5.17 and Figure 5.7 below are comparisons of the INVEST scores for all of the students. First, it is important to note that both the Canadian and Turkish students were highly motivated (6-7) in terms of continuous learning. In both cases this seemed to come from a desire to enter a good university after completing high school. The Iranian students, in contrast, had a pessimistic view of their job and academic opportunities after graduating, and that would have likely been the source of their low motivation. Since the Iranian students compared being in school to being in custody, they clearly had a low desire to be at school. All of the students scored the same on Vision for the Future (3-4): they all said they had a poor understanding of the vision for their school. This result, and even the score, was the same as for the teachers. Thus, regardless of the

area, the vision and purpose behind the school may be understood by the principal but it has not been conveyed to the teachers (as seen above) nor the students. Just as the teachers developed their own vision for what they thought the school's purpose was, the students did the same: they developed their own vision for the purpose of their school and why they were learning. Similarly, all of the students scored the same in terms of Transforming Structure (with the same score as the teachers). This suggests the students did not see anything in their school that challenged the hierarchical model or involve them in a meaningful way for decision-making about the school. The Iranian students also got the lowest score for Supportive Management, suggesting they only saw a very traditional approach to leadership in their school (i.e., teachers and principals used a rigid/hierarchical approach in the eyes of the students).

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Table 5.17.

*Comparison of the INVEST scores for the students*

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INVEST Dimension	Canada	Turkey (FI)	Iran	Turkey (II)
Inspired learners	6-7	6-7	3-4	3-4
Nurturing culture	5	5	3-4	3-4
Vision for future	3-4	3-4	3-4	3-4
Enhanced learning	5	5	3-4	3-4
Supportive management	3-4	3-4	1-2	5
Transforming structure	3-4	3-4	3-4	3-4

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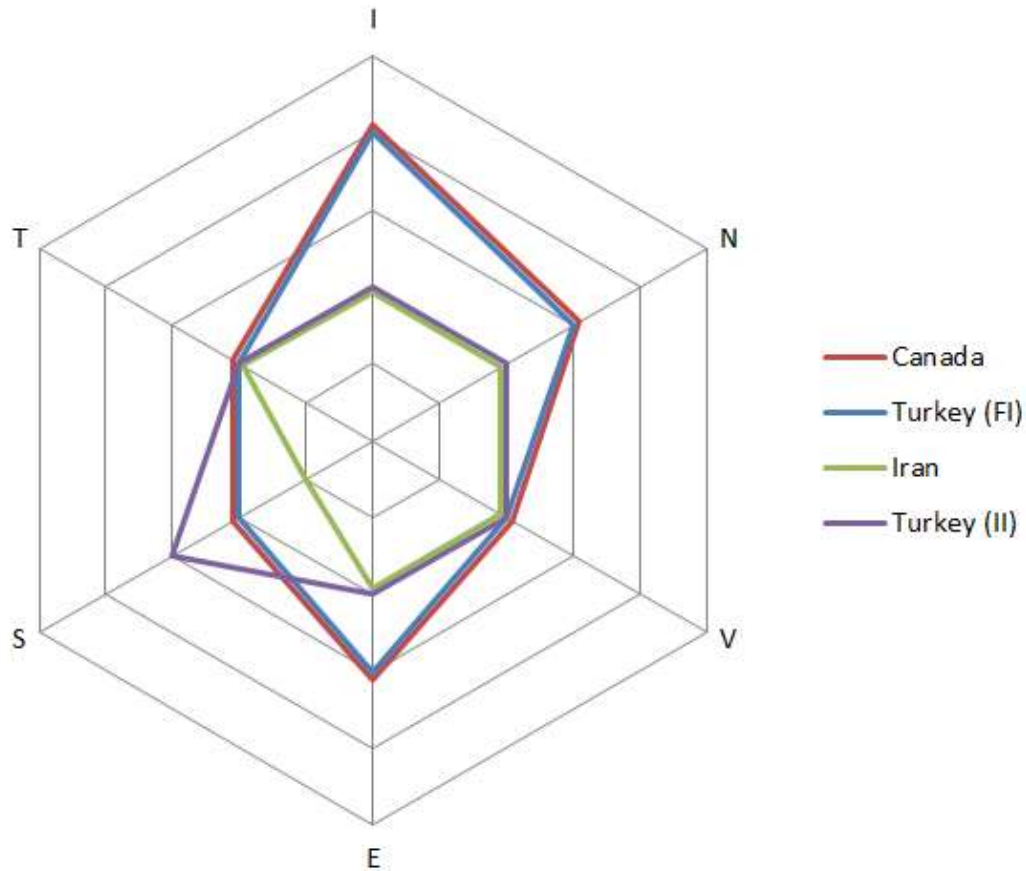


Figure 5.7. Comparison of INVEST scores of the students, using data from Table 5.17.

**Comparison of Schools.** The data for the various schools can be seen in Table 5.18 below, which contains the same values as Tables 5.12 to 5.14. When comparing across the schools, it was clear that the Canadian scores were generally higher. However, the student scores from the Canadian and Turkish students were the same and the scores of the Canadian and Turkish teachers were similar. This is significant, since the Turkish school is considered one of the top public schools in Turkey while the Canadian school was good but not within a similar national ranking. Across all three schools there was a common problem with Vision for the Future. The principals all felt their schools had clear visions, understood by everyone, but the teachers and especially the students had no idea what the vision or disagreed that the vision given was appropriate. As such, the

teachers and students ended up developing their own vision of what their schooling was for. All of the students associated their vision with a future career and the teachers regardless of the school encouraged this, but the Iranian students were very pessimistic about the usefulness of their schooling in terms of employment. In addition, all of the schools suffered from low (3-4) scores for Transforming Structures. This indicates that, regardless of the country, the public schools all took a hierarchical approach to the structuring of their school and this was resistant to change. The most advanced was in Canada, where the teachers and principal tried to include others in decision-making, but even in that case the school was limited in how much the structure could be changed.

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Table 5.18.

*Comparison of INVEST scores and T&S ranking across schools*

Dimension	CP	CT	CS	TP	TT	TS	IP	IT	IS
Inspired Learners	5	5	6-7	3-4	3-4	6-7	3-4	3-4	3-4
Nurturing Culture	5	3-4	5	3-4	3-4	5	3-4	1-2	3-4
Vision for the Future	6-7	3-4	3-4	5	3-4	3-4	5	3-4	3-4
Enhanced Learning	5	5	5	3-4	3-4	5	3-4	3-4	3-4
Supportive Management	6-7	5	3-4	3-4	5	3-4	3-4	3-4	1-2
Transforming Structures	5	3-4	3-4	3-4	3-4	3-4	3-4	3-4	3-4
T&S decision-making rank	5	6	/	3	3	/	3	3	/

***Additional Turkish school.*** When I went to Turkey to conduct the interview I asked the school board for Istanbul to direct me to a regular public high school. However, I met with the Istanbul Province National Education Director (IPNED)<sup>45</sup> and was told that the school I originally wanted to interview is too far away, so they introduced me to a different school, a school that is one of the oldest and internationally renowned high

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<sup>45</sup> İSTANBUL İL MİLLÎ EĞİTİM MÜDÜRLÜĞÜ

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schools in the country. It is considered an elite but still public high school, and this introduced some potential problems for the research. Both the Canadian and Iranian schools were considered regular public schools, even though the socio-economic status of the students in Iran was likely lower than that of Canada. To try to fix this potential source of bias, I also interviewed two more students and two more teachers from a different public high school in Istanbul. After analyzing their comments in the same way, I calculated INVEST scores and have included those scores in Table 5.19 below. Figure 5.8 also shows a comparison of these scores. This provides a way of comparing the elite public high school with a potentially more typical public high school. The only difference between the teachers' scores was that Vision for the Future was slightly higher for the typical school. This may be a result of a more standardized approach to the curriculum. The elite school might be given more freedom in their instruction and the principal could then use a certain history as the vision for the school, and although the teachers disagreed about this vision they had no alternative. Perhaps the typical school might just be required to follow whatever vision was given from the school board, and that lack of freedom allowed the teachers to have a clearer picture of their vision. However, this greater scoring for vision did not translate to the students, who scored the same for Vision for the Future across both schools. However, an important difference was that the students from the typical school were less motivated than the elite school (i.e., Inspired Learners score of typical school students was lower). This could be related to the elite students' desire for using their schooling for further academic education whereas the typical students may not see as a great a value in the result of their education. There were also differences in Nurturing Culture and Enhanced Learning scores, with the elite



students scoring higher than the typical students. This is likely related to more opportunities at the elite school due to greater funding, prestige, and freedom from the curriculum than a typical school.

Table 5.19.

*Comparison of INVEST scores for informal interview (II; typical Turkish school) and formal interview (FI; elite Turkish school) of teachers and students*

INVEST Dimension	Teachers/II	Teachers/ FI	Students/ II	Students/ FI
Inspired learners	3-4	3-4	3-4	6-7
Nurturing culture	3-4	3-4	3-4	5
Vision for future	5	3-4	3-4	3-4
Enhanced learning	3-4	3-4	3-4	5
Supportive management	5	5	5	3-4
Transforming structure	3-4	3-4	3-4	3-4

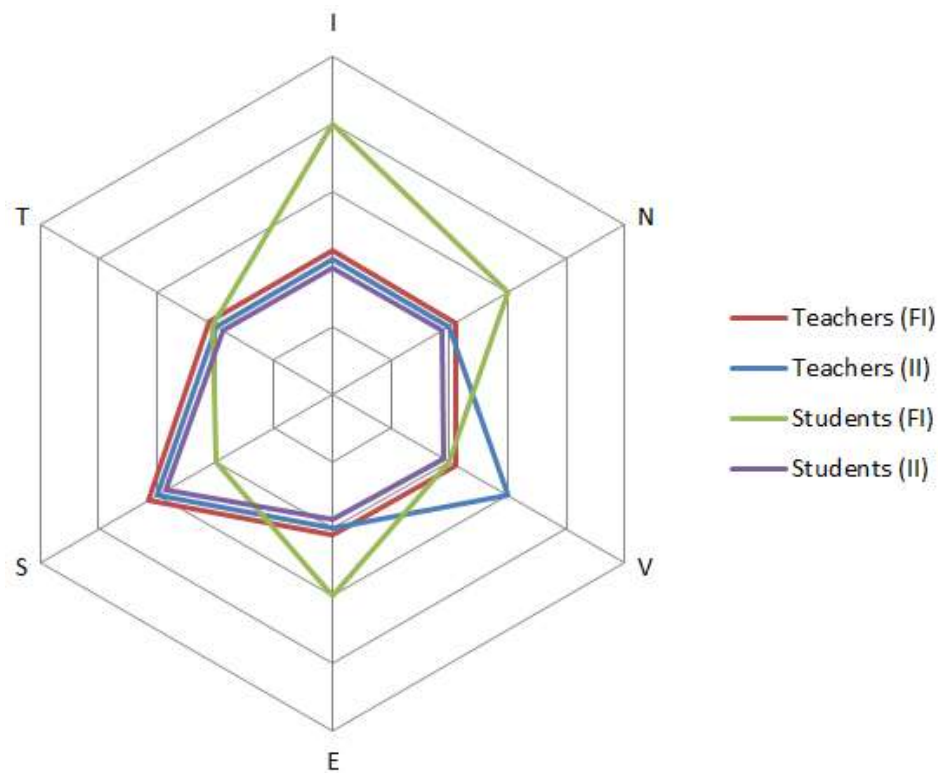


Figure 5.8. A comparison of the INVEST scores of the informal and formal Turkish interviews.

**Summary**

In this chapter I presented an analysis of participants' comments about Leadership Styles and Organizational Structure dimensions. The comments were analyzed in five ways: in terms of the Tannenbaum and Schmidt leadership continuum, the three Leadership Characteristics of a Learning Organization, the Five Principles of Individuals in a Learning Organization, the INVEST model, and an integrated analysis using INVEST. The responses were analyzed separately, and then the integrated analysis compared the responses across participant type (e.g., compared principals' comments to the teachers' comments) and across case studies (e.g., Canadian responses compared to Iranian responses). Across the various measures, the Canadian participants scored the highest, and the self-reports of their attitudes and behaviour were the most consistent with a learning organization and closest to the educational leadership model for a global society. However, the Canadian responses suggested that there was still area for improvement, such as students and teachers not knowing the vision of their school. In Chapter Six, I will conduct a further analysis in terms of the approaches to learning dimension and discuss various areas in which the studied schools and their surrounding context are problematic for implementing the model of educational leadership.

## **Chapter Six: Discussion**

In this chapter some general discussion arising from the results and their analysis will be presented. Most of this discussion is related to Research Questions 5 and 6, which look at methods for learning used in the school and potential problems for implementing a global education model in that school. In particular, there will be a discussion about the role of family for the participants (RQ5 & RQ6), the role of population patterns for the participants (RQ5 & RQ6), effect of religious ideology in education (RQ5 & RQ6), relationship between case studies and UN goals for sustainable education (RQ6), and changes needed so that situations like those presented in the case studies will be more aligned with a global education model (RQ6). This chapter ends with a general discussion of the results and how a new model could be voluntarily adopted by other countries.

### **Role of family**

Some of the responses from the students mentioned occasional involvement with their family. For example, TS1 said: “I would like to learn more by myself but my parents, and my brother who is a medical student, help and guide me with my school work.” This involvement was most strongly noticed in the Turkish case study.

The Turkish teachers indicated that their principal is supportive of hearing alternate opinions and involves others in decision-making discussions (a score of 5 on the Supportive management INVEST scale). The Turkish principal felt he was very good at this, since his comments indicated a score of 6-7 on Supportive management. However, this contrasts with the comments from the Turkish students. The students’ comments indicated a score of 3-4 on Supportive management. This indicates that they did not believe that the principal, nor their teachers, were engaging them in considerations

regarding how the school or classroom was going to function. This, in turn, may have affected their impression that the teachers and principal were interested more in the functioning of the school than any plans they had for their schooling. In other words, the students' motivation to do well in school may not have come from the teachers and principal, whose goals were not necessarily consistent with that of the students.

Consistent with this conclusion, TS1 said: "Students are responsible for studying, and teachers are there to make us learn through assignments, exams, and oral evaluations." TS1 also said: "We [students] aren't involved in any decision making, the teachers don't involve us in that. ... I don't like to give suggestions for my school because some of our teachers don't want to hear about new ideas." And in the category of Inspired learners, TS1 said: "I would like to go to medical school. So, I concentrate on my courses and just study my school books. This goal of entering medical school is encouraging for me." There was no comment from TS1 about the teachers supporting this goal of medical school, but there was support from the family as the quote at the beginning of this section indicates. Although these comments are from TS1, there are no conflicting comments from TS2; thus, it appears that both TS1 and TS2 received minimal encouragement from their teachers, at best, for accomplishing their goals.

Despite this lack of support from teachers, the students' comments ranked high on Inspired learners (a score of 6-7). Family could be considered one factor for this high inspiration and desire to learn. If the students had support from families then it seems more likely that they would continue to be inspired at school, even if the teachers were not that supportive. The students also considered their school very good: "My school ranking is perfect because it's between three high-ranking schools in Turkey. Therefore,

we have to study, study, study” (TS1); “My school is the best school in Turkey! I entered here with a good situation since many students dream to come here. I’m a lucky person to be here” (TS2). However, the excitement about the school suggested in these comments was from the school’s country-wide ranking, and not necessarily their enjoyment of attending school; in other words, the students were excited to go to a school that could potentially improve their future life prospects (employment or post-secondary education). This possibility is explicitly mentioned by TS2. Thus, it is possible that the students were inspired to learn so that they could accomplish their own goals (e.g., TS1 wanting to go to medical school), which they believed a school of a sufficiently high country-wide ranking could provide. The family then provided the support that was needed to maintain that motivation given the difficult and heavy workload (e.g., TS1 asking his parents for help, particularly his brother in medical school).

Although it was mentioned in the methodology chapter that interviews with family members were considered but excluded due to practical difficulties, this might be a topic for future research. There is some evidence that families play an important role in student success at schools in the Middle East (e.g., Tabrizi, 2013). From the comments here it seems that they could also play a role in the degree to which a school is a learning organization. Hence, interviewing family members with respect to their motivation for learning, and their relationship to the learning that occurs at the school, could help identify other factors that might aid or hinder implementing a model for education in a global society.

**Role of population**

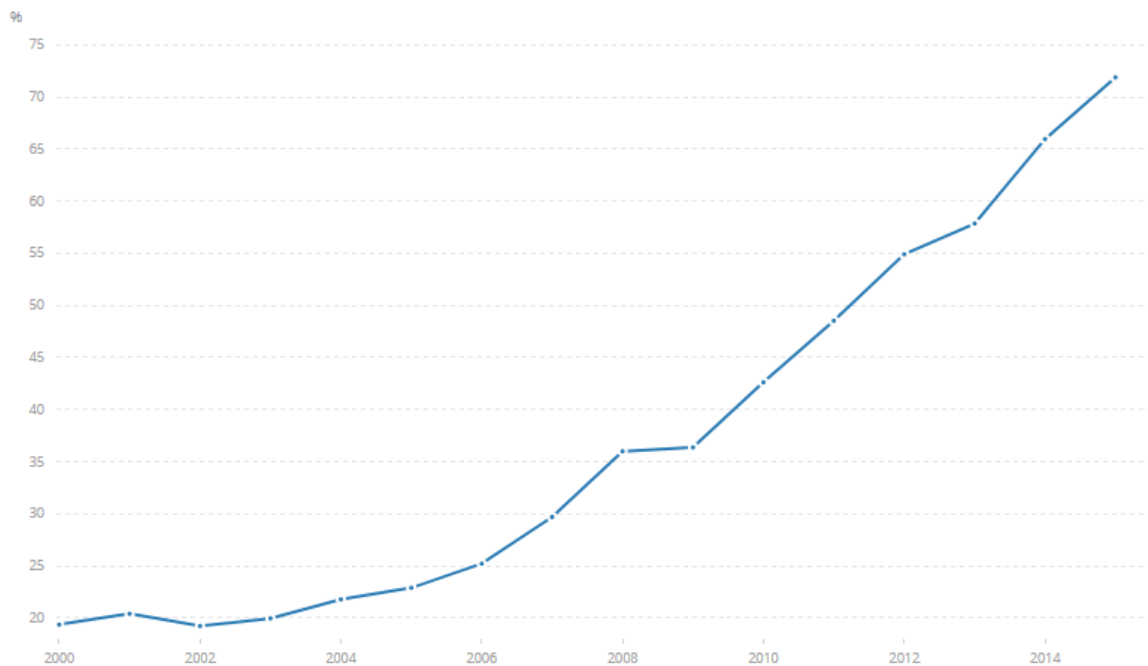
The Iranian principal, teachers, and students all indicated that the teachers are unable to provide sufficient instruction and support due to financial constraints. This can be seen in comments such as: “Self-improvement is a good method and necessary for education, but in Iran the teachers and other staff have many economical problems. For them, the first step is to handle their cost of living” (IP); “[Iranian] teachers have to work in two or maybe three jobs, and majority of them believe [their job as a teacher] is just something to keep while they grow older because it has a pension and insurance” (IT1); “Many teachers in our school don’t teach very well, and they invite students for private tutoring classes that they run on the side” (IS1). The problems this can cause over time to society and students’ quality of education have already been explored in other studies (e.g., Tabrizi, 2013), but it is also a potential problem for implementing a sustainable education model in Iran. However, there is a related financial problem associated with population growth.

If the teachers are struggling financially, and have multiple jobs, students may encounter employment problems after they graduate. The students believe the problem is bad: “I’m motivated by goals for my future, like a university degree and a good job, but I know that even with a university degree we [students] will not be able to find job” (IS1). As such, there is an expectation that they will have difficulty finding work and may require additional training or certification. In other words, they may think attending a post-secondary institution is required in order for them to have a hope of finding a job. There is some empirical support for this possibility, as explained in the following paragraph.

Of Iran's estimated 80 million people, roughly 60% of them are under the age of 30 (ICEF Monitor, 2015). University enrolments have increased dramatically in just over the past decade, from 22.8% of people aged 18 to 24 in 2005 to 71.9% of the same age group in 2017 (World Bank Open Data, 2017; see Figure 6.1 below). This indicates that enrolling in post-secondary education is increasingly seen as important or even necessary among Iranian. Given the students' current dislike of their schooling environment it seems likely that they might be further de-motivated by the thought that additional years of schooling would be necessary before they could potentially find a job. Furthermore, there is the concern of IS1 that even a university degree is insufficient for work. Data reported by Habibi (2015) suggest this concern is real: in 2011, Bachelor's graduates had a 19.4% unemployment rate and this was higher for STEM (Science, Technology, Engineering, Mathematics) degrees (e.g., 22% for engineering, 30% for computer science). Although there is still opportunity for employment, the rates are high and an intense competition in the job market, and desire from employers for credentials, is likely to lead to problems for students (ICEF Monitor, 2015).

Despite the reality and resulting concern regarding limited employment after graduation from high school or university, the biggest problem the Iranian students had with their school in terms of INVEST was the Supportive management dimension (a score of 1-2). Even the Inspired learners dimension, while low with a score of 3-4, was still in line with the rest of the dimensional scores. While the population metrics regarding job opportunities were de-motivating, they were not as bad as the poor educational environment the students were in, according to student responses. However, increasing the Supportive management dimension, although important, may not be able

to solve the motivational problem. It seems that the students have limited options for what to do after secondary school (both in reality and in their expectations), and those options may not improve as a result of more supportive teachers or more inspired learners. Wider societal change may be required.



*Figure 6.1.* Percentage of Iranian population aged 18-24 enrolled in tertiary education (World Bank Open Data, 2017).

### **Religious ideology in education**

It was noted while analyzing the leadership methods and organizational structures of each case study that some comments from the participants suggested there might have been ideological influences from their country's government, particularly their government's religious ideology. Although this ideology may manifest itself in the organizational structure or certain INVEST dimensions, understanding a wider context might be useful for exploring potential religious ideological effects. Identifying such effects may also help determine the appropriateness of each case study's existing



leadership methods and organizational structure as a model for education in a global society. Thus, this section will highlight examples of how government religious ideology may potentially be influencing the school system.

*Iranian case study.* In Iran, the reforms that occurred during the revolutionary years (1979-1988) were aimed at increasing the role Islam played in all aspects of life for Iranians. The first stage of these reforms had three goals: promoting a more Islamic culture, creating a new Muslim individual through socialization, and controlling Western cultural influence (Paivandi, 2006; Wright, 2010). Although the initial steps were political, education reforms started shortly afterward. Paivandi (2012) has indicated seven types of changes that have occurred in the Iranian educational system between 1979 and 2012: 1) new laws passed to change the goals and orientation of education towards furthering an Islamic culture, 2) curriculum changes to add more Islamic content to the textbooks and lesson plans, 3) structural changes to the education system to reorganize roles and the people in those roles, 4) increased state regulation and management of teacher training and recruitment, 5) new organizations<sup>46</sup> connected to the schools whose job is to reinforce socialization with the government's political and religious ideology, 6) increased enrolment in schools at all levels (primary to tertiary), especially for girls, 7) increased centralization of the education system. Some of these changes were seen in comments from participants, such as: "our education system follows a very hierarchical system" (IT1); "Since all students in Iran have to pass a course about military readiness, we have to go to a shooting range regularly" (IS2); "Any new ideas we get are supposed to be from a higher level. So, our principal is not open to new ideas from his staff ...

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<sup>46</sup> One example is the Basij, or the Organization for Mobilization of the Oppressed. This is a paramilitary force attached to the Revolutionary Guard whose role is to attract, train, organize, and employ volunteers to further the goals of the Revolutionary movement within the Iranian government (Golkar, 2015).

because that's what is expected of him: to follow the role given to him" (IT1); "A clergyman comes to our school once per week and students can ask them questions about religion" (IS2); "[Our principal's] trust for us varies depending on the activity, and of course the administrators who are religious have their own group of preferred teachers" (IT1).

Of the changes made to the education system, only three will be discussed in more detail: structural reorganization, curriculum changes, and gender differences. Some important aspects of the structural reorganization are political in nature. Teachers opposed to the Islamic Revolution were removed from the education system, as best as could practically be done, and the Educational Affairs (Omour Tarbiyati) committee in the government was created for the purpose of ensuring that an Islamic culture consistent with and supportive of the government was created at schools (Paivandi, 2012; Wright, 2010). Other religious practices were added to the schools, such as daily prayers and regular visits with members of the clergy, and events for spreading and sharing state propaganda (Paivandi, 2012; Wright, 2010). There was also a law passed in 1987 that emphasized the ideological framework for schools: that the most sacred mission of schools was to educate the new generation so they became "virtuous believer[s], conscientious, and engaged in the service of the Islamic society" (Paivandi, 2006).

One place the curriculum changes could be seen is in the content of textbooks. In the early 1980's, the government created a committee, the Headquarters of the Cultural Revolution (Setad-e enqelab-e farhangi), to reform the curriculum so it would have more Islamic values (Mehran, 1998). Such revisions started with higher education, but eventually resulted in changes throughout the whole education system (Paivandi, 2012).

As of 2008, a survey of elementary and junior high-school textbooks indicated that religious topics, particularly viewpoints consistent with the Shi'a Islamic ideology of the government, were found in 38% of lessons across all topics (history, social studies, science, literature, and religion) (Paivandi, 2008). The social science textbooks discuss various social (e.g., families, social groups) and political topics (e.g., democracy, theocracy, requirements for being an Islamic leader) from the perspective of Shi'a Islam (Paivandi, 2008). The history textbooks explain events in light of their relationship to religion and the conflict between divine truth and the enemies of this order (Paivandi, 2008). The textbooks also frequently refer to historical figures of post-1900 Iran, and themes of conflict and martyrdom are prevalent (Paivandi, 2008). This results in material that is inconsistent with a modern education (i.e., there is no separation between the experimental sciences, social sciences, and religion despite differences in methodology and epistemology) but very consistent with the ideological agenda of the Iranian government (Paivandi, 2012; Wright, 2010).

Another expression of ideology in the curriculum is the recent enrolment restrictions for the Humanities<sup>47</sup>. As was the case with adjusting the curriculum content, the Iranian government (through the Ministry of Education) has also restricted enrolment in Humanities courses at the high-school level (AftabNews, 2015). The government concern was that the entrance requirements were sufficiently low that it was becoming too easy to enter, so the response was to limit which high schools could offer courses on humanities subjects since that would make it more difficult to complete entrance requirements for post-secondary education (AftabNews, 2015). However, there is

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<sup>47</sup> At the high school level, the humanities in Iran is equivalent to social science in Canada. At the post-secondary level, the humanities refers to courses such as sociology, education, psychology, political science, law.

concern that enrolment restrictions and content changes are primarily focused on removing ideological opposition and making it more difficult for the citizenry to decide how they want to engage with their government (Saleh, 2017). If this concern were true, it would be contrary to the approach suggested by critical pedagogy. Since one goal of critical pedagogy is to enable students to learn how to analyze power relations, such as ideological influences within media, this goal cannot be achieved through an education system that emphasizes a certain ideology without providing contrary views or sincere opportunities for criticism and discussion of alternatives.

Furthermore, there are changes in the amount of time spent explicitly on religious education. From 1975 to 1994 the time spent on religious education went from 7% to 17% in primary school and 5.5% to 11% in secondary school, with the average amount of time changing from 6.4% to 12.7% (Gooya, 1999; Moussapour, 1999). Taking into account the religious material present in non-religion classes (e.g., history, Arabic courses, literature), roughly 25% of the time in school is spent on religious education (Paivandi, 2006).

There are also signs of gender discrimination in the school system. Paivandi's study (2008) of the school textbooks indicated that pictures of women in the books were biased towards the Shi'a traditional gender roles. For example, pictures of women are strongly present in home or family settings but absent from historical, cultural, scientific, and political personalities. Paivandi concluded that the way in which men and women are presented in textbooks indicated that men and women were unequal, have distinct social and private roles based on their gender, and that women and men are neither socially nor legally equal (Paivandi, 2008). These details are reinforced by other laws that impose

these same social roles upon people, such as women being required to dress a certain way and restricting how men and women can interact in public and even large privately-held events (Paivandi, 2012).

***Turkish case study.*** The ruling political party in Turkey is the Justice and Development Party (Adalet ve Kalkınma Partisi, or AKP). Since it came to power in 2002 there has been plenty of debate regarding whether the AKP is supportive of a democratic form of government, as per Western European countries, and a secular (i.e., non-religious) approach to social and political affairs. A good example of this debate is provided by Çınar (2011), who reviews a representative sample of academic works analyzing the AKP. These works discuss: whether the AKP follows a political Islamic ideology, whether it is against or supportive of secularization, whether it is democratic, and whether it is similar to other European religious-democratic parties. Çınar (2011) concluded that the representative sample is in complete disagreement about these topics, likely because it is too difficult to remain neutral when conducting such an analysis. Turkish scholars frequently use academic research to support their own ideological stance, because of how strongly embedded the topics of Islam and secularization is in the public and private lives of the Turkish citizenry.

For instance, the analysis conducted by Eligür (2010) suggested the AKP follows a political Islamic ideology, and is very much interested in eliminating a secular democratic state. In contrast, the analysis conducted by Hale and Özbudun (2010) suggested that the AKP uses the traditional social values of the Turkish people (which are based on Islam to a large extent) in much the same way as conservative political parties in Western countries. In other words, the AKP is not Islamic in the sense that they are

trying to use the state to push Islam on the population, but rather are pushing for a state that is independent of religion and democratic in nature but which encourages and supports the social values consistent with Turkish culture (which may be Islamic in origin). The analysis conducted by Atasoy (2009) suggested that the AKP is using Islam in the party's ideology as a value system while also pursuing a policy agenda in favour of liberalism and democracy (so as to join the European Union), and a neoliberal approach to economics. Çınar's (2011) own analysis suggested the AKP is focused on their ideology of creating a national identity reminiscent of the Ottoman Empire, and that the Islamic nature of the party is from this identity. In other words, the party is secular in terms of political policy but Islamic in terms of social values and national identity.

There are also examples of the AKP taking a more authoritarian stance, the most recent and strongest one being their reaction to the failed military coup in 2016. After the coup attempt failed to topple the government, the response from the AKP was a wide arrest of tens of thousands of government workers – soldiers, police, judges, teachers, and various bureaucrats and administrators (Cockburn, 2016). This arrest was justified by the AKP as cleansing the state from terrorists but external commentators were more concerned that this represented an unnecessarily harsh response. For example, one of the comments from Amnesty International was that “The sheer number of arrests and suspensions since Friday is alarming and we are monitoring the situation very closely” (Cockburn, 2016). One year later, more arrests of military personnel, police, and academics have occurred and the same concerns from the international community have been voiced (AFP, 2017).

Some of the ideological behaviour of the ruling party can be seen in comments from the participants. One example was the replacement of teachers in the school with those sympathetic to an Islamic instead of a secular ideological viewpoint: “We’ve changed almost 98% of the teachers here because they were secular” (TT2); “I look and find teachers who practice Islam. [Then I suggest these people to the principal.] After my suggestion the principal invites them and we have a small interview.” (TT2); “most of our students and their families are secular. So, by having Islamic teachers at least they can learn about Islam this way in school” (TT2).

***Canada case study.*** In the Canadian case study, there were no comments from participants on the topic of religion. This is unlike the participants in the other case studies, who spoke rather openly about religion despite being in the public school system. However, a lack of comments from participants does not mean such influences do not exist but rather that nothing was openly discussed. The Canadian federal government does not have much control in that matter since provincial governments are responsible for education across the Canadian provinces. As already discussed in Chapter Four, the public schools in Ontario are operated by either secular (i.e., non-religious) or Roman Catholic school boards. Although the Roman Catholic school boards prefer teachers to be practicing Catholics, there are no such preferences for the secular school boards. Since the 1980’s, Roman Catholic schools have been given public funding like the secular public schools, but on the condition that non-Catholic students can attend the Catholic schools and that exclusions from religious studies courses or ceremonies be allowed for anyone who requests it (Alphonso, 2017). However, there have been recent examples of students asking for such exclusions and being granted them in a way that violates human

rights laws. For instance, one high-school student requested an exemption from religious studies classes in their final year and was granted this exemption provided they did not attend any other academic ceremonies (Alphonso, 2017). A lawsuit was launched, with the result recently settled in favour of the student: the Ontario Catholic high schools cannot force students to provide acceptable reasons or meet with school board members in awkward or confrontational settings before an exemption from religious studies will be considered or accepted (Alphonso, 2017). This result is interesting when compared to the circumstances of the other case studies. In particular, it shows that the Ontario government is pushing for a more religion-neutral stance in the public education system. It appears that the government is not banning religious studies or events, but is instead trying to ensure that religious studies and events are not being forced onto students without their (or their parents') consent.

### **UN sustainable education target for 2030**

The United Nations has set out a plan (United Nations, 2015) for improving the educational circumstances of all countries by the year 2030. This document is important because it outlines expectations from the international community about what kind of education is desired for a global society. As such, it would be useful to see how the case studies and understandings of schools practices gleaned from them align with the expectations of this plan. The time frame for accomplishment of the goals outlined in this document is 2030, more than a decade away, so there is no expectation that the goals will have been met at this time. However, if there are problems posed by the leadership style or organizational structure of the school in a case study for accomplishing the 2030 goals then the approach used by that school is likely to be incompatible with the global model



this thesis is exploring. Therefore, the rest of this section will look at some specific goals within this UN plan and see how the different studied schools align with them.

***Equitable education.*** Goal 4.1 of the Sustainable Development Plan is for countries to: “ensure that all girls and boys complete free, equitable, and quality primary and secondary education leading to relevant and effective learning outcomes” (United Nations, 2015). This goal is problematic for the Iranian case study, and may be a problem in the Turkish case study, because of the circumstances with religious ideology. Although reference to ‘equitable’ education is often ambiguous, the term can suggest a need for fairness in educational access and content regardless of the students’ chosen religion (Zhang, Chan, & Boyle, 2015). As was previously discussed though, the Iranian education system seems designed to further the Shi’a Islamic ideology of the current government. In particular, the 1987 legislation regarding education states, “[religious] purification takes precedence over training”; further, the objectives of such education must emphasize “the promotion and reinforcement of religious and spiritual foundations through teaching the principles and laws of Shi’ite Islam” (Safi, 2000).

Another area of potential inequity in education is the language of instruction. In Iran, there are significant minority populations whose first language is not Persian, such as the Kurdish, Azeri-Turkish, Turkmen, Arab, Gilaki, Mazandarani, and Balouch peoples (Tabrizi, 2013). Although the Iranian constitution allows instruction to occur in languages other than Persian, in practice teachers are required to teach in Persian and the students, regardless of their first language, must learn in Persian (Tabrizi, 2013). This policy has been associated with higher dropout rates (Tabrizi, 2013). It also seems unnecessary, since there are areas in Iran where a minority group’s first language is the

dominant language of social and economic interactions. A similar problem exists in the Turkish case study, where Turkish is the required language in schools even in areas of the country where the first language of other minority groups (such as the Kurdish people) dominate nearly all social and economic interactions (Mabry, 2015). In the Canadian case study, there is a better sense of language differences such that instruction can occur in either of the two official languages (English and French). However, Canada may soon face a circumstance where other languages (such as Arabic or Mandarin) become sufficiently common in certain areas that other languages of instruction may need to be considered.

The Turkish and Iranian case studies face further problems in this regard because they are moving towards a Leadership by Islam approach (especially Iran). In that approach, justice is considered to be an important quality that leaders should express and develop. However, having a school system that bends to ideological interests instead of policies that lead to equity and quality in education is not a good expression of justice. In the case of Iran, requiring students to learn in Farsi, when other languages would be more appropriate for the surrounding local context and reduce dropout rates of students, is not an example of justice and it actually harms the quality of the education. A similar case could be made for the Turkish school, though it may not be as bad since the ideological influences of the government are not seen as strongly: the Turkish school may be pushing for more Islamic teachers but it is not outright pushing the religious ideology of the government as in the case of Iran. However, the concerns that the Turkish government may push for a greater Islamic ideological influence in the school system is a legitimate

concern that is yet another example of uncertainty over whether its leaders are acting with justice in mind.

***Wealth and gender discrimination.*** Goal 4.5 of the Sustainable Development Plan is for countries to: “eliminate gender disparities in education and ensure equal access to all levels of education and vocational training for the vulnerable, including persons with disabilities, indigenous peoples and children in vulnerable situation” (United Nations, 2015). This goal has been problematic for Iran due to limitations in teacher support. For instance, the Iranian participants described the limited time teachers had for in-class support and that most support given outside of class time was in the form of paid private classes. There were also different levels of high school depending on academic achievement, and family wealth plays a role in such achievement given the prevalence of and need for paid tutoring. For instance, IT1 said: “[Iranian] students are in one of three different groups: [1] rich, [2] smart and active, and [3] students from poor families. ... students from poor families usually have to work after school so most of them have to go to public schools.” Both of these points suggest that Iran is currently not ensuring equal access to education and that there are differences depending on wealth, family circumstances, and teacher training.

Gender discrepancies are a different issue for Iran. The number of women being enrolled in schools has increased dramatically since the 1979 revolution, and high-school as well as post-secondary diplomas have also increased drastically for women (Paivandi, 2012). It has actually changed such that the number of women becoming literate is outpacing the number of men, primarily due to dropout problems with boys (e.g., see Tabrizi, 2013). Although there appears to be limited discrimination between men and

women in the schools in terms of enrolment, there is discrimination in terms of gender roles. As discussed previously in this chapter, the social roles expected of the genders are presented in an unequal fashion in the schools and in a manner more consistent with the religious ideology of the government (Paivandi, 2008). There are also large differences in terms of employment or usage of post-secondary degrees; women are often required to adopt the social role of staying at home or working in very specific fields rather than working in a field related to their degree due to societal pressure or lack of employment opportunities (Paivandi, 2012). To summarize, this is another manifestation of the social expectations of the gender roles presented in the school curriculum and promoted by the government.

Both the gender discrepancy and the unequal access to education are further problems for Iran given that they are trying to follow Leadership by Islam. As previously mentioned, justice is an important quality for a leader and both of these issues are problems for trying to show justice. However, these issues are also a problem for the participatory approach of Leadership by Islam. With the participatory approach, the expectation is that all people are able to participate to some degree in the functioning of the system. If students are limited in their ability to access education, such as because of family wealth or learning difficulties, then the participatory approach begins to break down because the pool of people who can participate shrinks. In one sense, the dropout rate of a school is also very important since it affects participation in both schools and jobs that require at least that level of education.

***Diversity and peace.*** Goal 4.7 of the Sustainable Development Plan is for countries to: “ensure that all learners acquire knowledge and skills needed to promote

sustainable development, including, among others, through education for sustainable development and sustainable lifestyles, human rights, gender equality, promotion of a culture of peace and nonviolence, global citizenship and appreciation of culture diversity and of culture's contribution to sustainable development" (United Nations, 2015). In addition to the religious ideology problems for Iran, there are also problems with respect to the idea of peace. For instance, IS2 said: "all students in Iran have to pass a course about military readiness, we have to go to a shooting range regularly." As well, Paivandi (2008) discussed the prevalence of conflict and war themes in school material and this is more consistent with the government ideology of revolution and fighting to promote their way of life rather than the UN goal of promoting peace. The religious ideology problem appears again because there is an emphasis on one specific perspective instead of ideas of global citizenship and promoting appreciation of diverse cultures. In addition, the organizational structure, with a high degree of centralization in decision-making, seems to be problematic in relation to addressing issues of diversity in cultures because that structure is inconsistent with allowing local groups to make decisions based on their own circumstances. For example, because topics such as course content, after-school activities, and the vision for a school are all decided at the national level instead of the local level local, it is difficult to employ culture-specific decisions. This is inconsistent with global citizenship and appreciating cultural diversity.

In the Turkish case study there were similar issues with respect to diversity and peace. Due to an emphasis on religious ideology from the government there was an increasing desire to have Islamic teachers in the schools and encourage Islam in the curriculum. For example, consider this comment from TT2:

I think my vision for my teaching work is more important [than the school's vision] because a majority of these students are from secular families. Hence, I have to teach them religious issues with a language that they can understand. This is my vision, and I think the school's vision is the same: developing an Islamic approach to education.

Also, consider TT2's comments regarding hiring Islamic teachers: "We've changed almost 98% of the teachers here because they were secular"; "I look and find teachers who practice Islam. After my suggestion the principal invites them and we have a small interview."; "most of our students and their families are secular. So, by having Islamic teachers at least they can learn about Islam this way in school." This is also pushing for an attitude contrary to global citizenship and accepting of cultural diversity. It is also contrary to the quality of justice for Leadership by Islam, since it intentionally excludes people from work based on their beliefs and is likely to affect how others of differing beliefs feel when in that school (e.g., children of a non-Islamic background may feel excluded or pressured if too many teachers are of an Islamic background or push an Islamic ideology).

The Canadian case study does not appear to have issues with accepting cultural diversity and promoting peace. One potential problem is with the hierarchical organizational structure and centralized decision making, but the situation for Canada is not as centralized as in the case of Iran or possibly even Turkey. For example, in the Iranian case study the principals indicated that the vision for their school came from the school board but none of the teachers had seen it and both the principal and teachers thought they could not contribute to, or comment on, that vision. This suggests a rigid

vertical and centralized structure, since external input has limited effect. In Turkey, the vision for the school used by the principal was available to the teachers and students, even though they did not agree with the vision, but the principal seemed unwilling to accept suggestions for changing the vision. This also suggests a vertical structure, but less centralized than the Iranian case since the vision was determined at the school-level and not by the central government. In the Canadian case study the vision for the school also came from the school board but the principals and teachers knew how to access it (unlike the Iranian case), agreed that it was the vision for their school (unlike the Turkish case), and thought they could offer suggestions or changes to the vision (unlike both the Iranian and Turkish cases). Even though the Canadian school's vision was determined by its school board (i.e., an example of a vertical and centralized structure), the school board was separate from the Federal government (i.e., less centralized than the Iranian case) and was open to suggestions (i.e., external input had more effect, and thus was less centralized and vertically rigid).

***Teacher quality.*** Goal 4c of the Sustainable Development Plan is for countries to: “substantially increase the supply of qualified teachers, including through international cooperation for teacher training in developing countries, especially least developed countries and small-island developing States” (United Nations, 2015). In Iran, the issue of teacher quality is most visible in relation to motivation and time available to teach. As previously discussed, the Iranian teachers are often unable or unwilling to spend extra time with students and tend to be working at multiple jobs. Poor motivation of teachers due to an insufficient salary has been previously identified (Tabrizi, 2013) but it is also repeated in comments from this study. The fact that students often need to attend private

tutoring sessions suggests something about the quality of the classroom experience, or at least insufficient in-class time to properly handle a topic. This can be seen from comments such as: “many teachers in Iran believe their responsibility is to teach their course for the allotted time, about one hour, and that is it” (IT1); “Many teachers in our school don’t teach very well, and they invite students for private tutoring classes that they run on the side” (IS1). Teacher quality may also have suffered as a result of an increasing number of people entering a teaching education program to avoid the Iran-Iraq war or because of an inability to get a degree in STEM areas (Tabrizi, 2013). Although there are motivational problems of teachers, the issue of teacher quality is related to accountability. If teachers are not accountable in terms of how well they are teaching, nor principals in terms of how well the school functions overall, then there are limited structural ways of improving quality; another option is for teachers to be self-motivated to improve themselves, which this study has shown to not be the case in the Iranian school. The problem with accountability is a greater issue because it is another important quality of leaders in Leadership by Islam, which the Iranian school is trying to follow.

In the Turkish case study, the interviewed teachers were motivated in their work but the school was also trying to hire new and better teachers. Although it is possible that only those motivated to work remained in the school, there may have been ideological reasons for hiring different teachers. There is also limited collaboration between the teachers: “many teachers don’t have enough time for other activities, so we just focus on our specific fields [teaching subjects]” (TT1). Looking at broader trends in Turkey though, the country is facing an overabundance of teachers such that the number of applicants is ten times the number of job openings (Çakmakçı, 2017). This is not



necessarily a problem for quality, as presumably the public schools could hire only the top applicants, but it says something about the motivation for work. For instance, the general manager for teacher training at Turkey's Ministry of Education said that teaching "was perceived as a guaranteed job" and that "when we condition [potential teachers] with the notion 'you are a teacher, you can't be something else,' we are doing them a disservice" (Çakmakçı, 2017). This suggests that many Turkish teachers may have the attitude that teaching is a permanent position with pension and long-term economic stability, and that is the most important reason for becoming a teacher.

Although the teachers were not evaluated directly in terms of intercultural knowledge or global competence, these are still important characteristics for teachers to develop. Based on how the teachers were evaluated though, since none of them engaged in active learning techniques or critical pedagogy they were not developing in students the critical attitudes needed for a foundation in global competence. Furthermore, none of the teachers talked about including material on intercultural knowledge, even though some of the students in the Turkish school were experiencing a different culture when they were interacting with German people. Thus, for this UN goal to be achieved there needs to be more quality in the teachers in terms of their intercultural understanding, since that is a growing need for new students.

### **Necessary changes for a global model**

In this section, specific areas of each case study that make their leadership style and/or organizational structure less consistent with a global education model will be explored. In particular, three topics regarding the INVEST model will be discussed: the school vision, supportive management, and transforming structure. In addition a fourth

topic will be explored, which is how well the schools use an active learning approach.

The active learning approach needs to be considered because of its effect on learning, as discussed in Chapter Two, as well as its ability to empower students<sup>48</sup>. Since a global education model benefits from both a learning organization structure and leadership style that empowers students, both the INVEST and active learning approaches will be explored.

*School vision.* In all three case studies, the principals said they had a clear vision for their school and that the teachers understood this vision. The Canadian Principal said that: “our vision is clear,” “you can see our school’s vision statement in many areas,” and “I know that the teachers and staff here know what our vision is.” The Turkish Principal said that: “There is a plaque on my office wall, and our vision is written on it ... we’ve had a clear vision from a long time ago,” and “I’m sure this vision is clear for everyone. There’s no doubt that the staff and teachers know about it.” The Iranian Principal said that: “there is a vision for this school. It’s available in my office here,” “I think all of the staff and teachers already know the vision for our schools,” and “No [I don’t share the vision with students], it is the teachers’ responsibility to give that information to the students.”

None of the teachers though had seen the vision statement or knew the vision for the school like their principals thought. The Canadian teachers said: “I haven’t seen a vision for my school, so I don’t know what it is” (CT1), and “The school board creates a vision for our school, so we can talk with them about it. ... I haven’t seen that vision

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<sup>48</sup> Empowering students is consistent with the nurturing culture, enhanced learning, and supportive management dimensions of INVEST. Since active learning involves some level of delegation, it is also consistent with a higher level in the Tannenbaum & Schmidt Leadership continuum. However, active learning is an approach to learning independent of both the T&S and INVEST model, so it should be considered separately.

displayed in my school though” (CT2). The Turkish teachers said: “I haven’t seen a clear vision about this school” (TT1), “Yes [there is a plaque in the principal’s office], but that is about our school’s history” (TT1), “As teachers, we never talk about the school’s vision between us, but I think all of them know their responsibilities and that is enough,” (TT1) and “We [the teachers] never talk about our school’s vision with the students” (TT1). The Iranian teachers said: “I have not heard about our school’s vision, but I believe teachers have to teach and assess students very well. I could not find anything about our school’s vision on the Internet either” (IT1), and “in Iran we have different types of schools, each of which have different visions for their students” (IT2).

None of the students knew the vision for their school either. For instance, the Canadian students said: “Vision for my school? I don’t know” (CS1); “We don’t have a prevalent slogan in our school, and my teachers never mentioned one. I certainly believe other students, my classmates, have no idea about our school’s vision” (CS1); “Honestly, I don’t know my school’s vision and mission, but I can guess it. Its mission is to help students to understand the knowledge in our text books” (CS2). The Turkish students said something similar: “Even if I didn’t see or read about our school’s vision, I believe I can study well and continue my education in upper levels. ... [my friends and I] discuss about our future, but this vision belongs to us” (TS1); “Some teachers informally talk about our future, but it’s not a vision. That is just something to motivate us to study harder” (TS2); “we studied [the plaque in our principal’s office], but it’s just about the history of this school” (TS2). The Iranian students said: “I haven’t seen or heard about my school’s vision. I don’t think other students know about it either” (IS2); “Perhaps [passing the

Konkour exams] can be the vision for our school, principal, his vice-president, the staff, and our teachers” (IS1).

All of these comments indicate a clear lack of communication about something quite central (the purpose of the school). The principals, teachers, and students all assumed they were working for the same purpose and that meant they had no desire to talk about the vision of their school. This is more suggestive of a transactional leadership style, because there is a lack of opinion sharing, limited teamwork, and poor delegation of authority for decision-making. For improvement, and to increase the degree to which these schools function as learning organizations, there needs to be clear communication about the school vision and effective dialogue about it. If the students do not understand the vision, how can they tell if their teacher is teaching effectively? Likewise, if the teachers do not understand the vision, the purpose of the school could be quite different than what school administrators claim its purpose is.

*Active learning and critical pedagogy.* None of the schools in the three case studies used critical pedagogy as an approach. Since critical pedagogy requires critiquing, analyzing, and challenging power relationships this would be highly problematic in Turkey and Iran, where the schools were used to push the ideology of the government. Even though the school in Canada was not pushing any particular ideology, there was also no evidence that the teachers or principal were encouraging an analysis and critique of the power relationships in their school or in Canada. This is problematic for a global education model because it means the students are not being educated about the role that power plays in oppressing various groups, and thus the students are less capable of determining for themselves whether some other group is being oppressed and what to do

about it. In other words, the students are not being educated about one important way of cooperating between diverse cultures and groups of people.

In terms of active learning the schools were slightly better, but only in the sense that some active learning techniques were used. In most cases, the teachers only used up to the third level of Bloom's taxonomy (i.e., they used remembering, understanding, and applying). Brainstorming was the most common active learning technique being used, although collaborative learning in the form of group projects was occasionally used. Working to improve metacognition or using problem-based learning was not reported in any of the schools.

In the Canadian case study, the comments about brainstorming include: "I use brainstorming in decision making, since it is an excellent model. I like it when people are free to suggest and explain their opinions" (CP); "Yes, we use methods like teamwork and brainstorming" (CT1); "Our teachers don't use that brainstorming technique, but we are free to talk about our opinion" (CS1). In the Turkish case study, the comments about brainstorming include: "Teachers and students are always ready to come up with their own opinions" (TP); "I like to use discussions and brainstorming in my classes, and want to develop this further" (TT2); "I don't like to talk about my opinions in class; my duty is learning, hence, I am serious about it" (TS2); "I don't like to give suggestions for my school because some of our teachers don't want to hear about new ideas" (TS1). In the Iranian case study, the comments about brainstorming include: "I like it when I hear that someone has done brainstorming, but it's not a regular method in our education system" (IP); "[brainstorming] can be a good method but we don't use it. On the other hand, in our society there are some things we can't share our opinions about and other times we

cannot talk about our opinions at all” (IS1). Notice that in all three case studies brainstorming was often used interchangeably with sharing of opinions. This confusion likely indicates that the participants did not understand the idea of brainstorming very well, and this technique could be improved. However, the Turkish students indicated they were unwilling to share opinions and the Iranian students indicated that sharing opinions was not always socially acceptable. Both of these points are problematic for a global education model. Students should feel comfortable and encouraged to share their opinions, since being comfortable with a diversity of viewpoints is part of collaboration and cooperation among diverse cultures. The Canadian students were better in this regard, and may only need to improve their understanding of brainstorming as a technique.

Collaboration and teamwork was more problematic than brainstorming. In the Canadian case study it was clear that some collaboration occurred but it could definitely be improved: “Group learning is a good method, we have some groups and I would like to develop them” (CP); “we use methods like teamwork and brainstorming, but the teamwork is focused on the subject” (CT1); “We don’t have group or organizational learning. Actually, I prefer to study alone. Sometimes we have group activities in our courses, but those are just about the topics in that course” (CS1). In the Turkish case study, some collaboration occurred but it could also be improved: “we have group learning activities based on subject. Since I teach mathematics, all discussions in my groups will be about math” (TT1); “our school doesn’t use metacognition, collaborative learning, or any of those” (TS1). In the Iranian case study, collaboration was definitely limited. The principal described the situation as follows:

Teamwork between students would be good, since it's a more active learning approach as you previously mentioned, but the quality and effectiveness of this strategy depends on the teachers. Team activities can be hard sometimes for Iranians, especially Iranian students, but I believe we have to improve this and create a better relationship between students and teachers.

IT2 said practically the same thing as the principal:

Since I teach sports, group activities are very important in my class. I try to teach how to form strong teams, and how to keep teams together. In Iran we have a cultural problem, because students don't understand the purpose of teamwork. Also, students stay in teams when they are weak or lacking; if one person thinks they know enough, even a small part of the needed knowledge, then they prefer to work alone. For example, in a sports team, like football, strong students want to be the winner and only the result is important for them. However, I give excellent scores to the students who have good teamwork.

IS1 said something similar as well: "We don't have group activities in every class, and of course the school principal is 100% against it. Some of our teachers are positive about it, but my classes we've only had them once or twice." These quotes indicate that the best example of teamwork and collaboration was in the Canadian case study, and the worst example was in the Iranian case study. However, all of them need improvement; the schools in these case studies have implemented teamwork in the form of group projects or team sports, but this is quite different from a collaborative learning approach.

Lastly, none of the schools involved the more advanced active learning techniques like metacognition. This can be seen in comments such as the following:

“[metacognition] sounds like a good method for learning but my teachers didn’t talk about it” (CS1); “our teachers didn’t talk about collaborative learning, metacognition, or critical learning, and anything like that” (CS2); “Those topics you mention [e.g., metacognition] are new for our schools” (TP); “I don’t think the teachers nor our principal practices metacognition” (TT1); “our school doesn’t use metacognition, collaborative learning, or any of those” (TS1); “These topics you describe [metacognition, critical analysis, collaborative] are new for our school. We never talk about these topics” (IT1); “Metacognition and such are not methods which our school uses” (IS2). In addition, a lot of the students and teachers had never even heard of metacognition so I needed to explain it during the interview. Given the importance of metacognition for quality and depth of learning, implementing this in schools needs to be done for a global model.

***Supportive management.*** In the Canadian case study, there was consistency between the principal, teachers, and students about openness to ideas and opinions. The teachers were able to delegate more to students than the principal could to the teachers, and so overall the principal ranked level five on the Tannenbaum and Schmidt continuum while the teachers ranked level six. The students indicated that some of the teachers were not as open as others, so this is one area of improvement for the Canadian school. For a learning organization, where the leaders need to be aware of the state of individuals, listen to their concerns, and determine how best to support them in their own growth (i.e., how best to empower others), the scores of the teachers and principal are acceptable. This suggests that the Canadian school is student-oriented in outlook, because there is an emphasis on listening to and supporting students rather than the authority of teachers.



In the Turkish case study, the principal indicates that his management approach was open to the ideas of others as long as it was consistent with the vision of the school. The comments from the teachers suggest that the principal does listen to their opinions, and that they are interested in opinions of the students as well, but it is possible that the teachers are providing suggestions consistent with the principal's vision for the school. This is best shown in TT2's comment about teacher candidates: "our principal is a positive and open-minded person. He even receives my suggestions about candidates for new teachers to hire." Comments from the students though suggest the level of openness is limited to only some individuals and certain topics. As previously mentioned, the principal and teachers seem to be at level three along the Tannenbaum and Schmidt continuum. This school already has some problems with awareness of the school vision, and the principal seems unwilling to change this vision. Thus, students and teachers are less likely to suggest contrary points of view, since they may assume their ideas will be ignored. Although it is good that the teachers and principal want to get ideas from others, without at least being open to contrary points of view they will not be able to empower and support the growth of others. This means the teachers and principal are mainly using a teacher-oriented approach, given that authority delegation is low, but they may be transitioning to a student-oriented approach given their expressed desire to hear more opinions.

In the Iranian case study there were similar issues as the Turkish case study. The principal wanted to be open to new ideas but was restricted in what changes could be made since much of that authority was with the school board. As such, there was openness only to ideas already consistent with the current plans. The teachers seemed to

behave in the same way, and the students' comments suggested they were aware of this limitation. The principal and teachers in this case study ranked level three on the Tannenbaum and Schmidt continuum, meaning they had a similar teacher-oriented approach as in the Turkish case study. In other ways though this case study may be worse, given comments from the teachers about problems within their education system with how teachers and principals discipline others. As such there needs to be more work done to improve issues with discipline, over centralization of authority within the education system, and lack of openness to contrary ideas.

***Transforming structure.*** In all three case studies the organizational structure was highly vertical. Each school had effectively four levels: the principal, vice-principal, teachers and staff, and the students. There may also be a teacher who is the department head. Given the previously discussed differences in the Tannenbaum and Schmidt continuum, teachers and the principal in the Canadian case study were more open to input from lower levels of the hierarchy (level five and six) than those in the Turkish or Iranian case study (level three). For instance, the Canadian principal said: "We don't have boundaries between these groups. All of us can work together, talk to each other, and share our opinions"; "Yes, my office door is open for all students and staff. I'm happy to hear from them, it's an important part of my responsibility." The comments from the Turkish case study were in contrast to this: "delegation of authority is a hard topic. I believe the teachers are well experienced, so they know what is expected of them. Sometimes we talk about their objectives, but it's not a general discussion" (TP); "I prefer to see all of the expected roles and responsibilities of members of this school known and followed. Our principal agrees, and likes to make sure we have clear

responsibilities” (TT1); “Students are free to visit the principal’s office and talk with him whenever, but I prefer not to do that. I think I can solve my own problems, without using his method” (TS2); “I don’t like to have general discussions with my teachers in class . . . I think some of the teachers don’t like to have discussions, and many of them don’t seem open to our opinions anyway” (TS1). Similarly, consider the following quotes from the Iranian case study: “I like to do [decision-making] work myself. I’ve defined the job for my assistants very clearly, and I monitor them regularly to make sure things are going well” (IP); “Because of how centralized the education system is, principals, teachers, other staff and even students are limited in what they can do and how they can develop regarding their responsibilities” (IT1); “Students don’t like going to the principal’s office. However, his door is open for us whenever we want to speak with him” (IS2). Since this openness is desirable for a learning organization, it would be better for the Turkish and Iranian schools to move towards the Canadian leadership style. However, the Canadian structure still remains vertical in nature. To better implement a learning organization in the schools, the structure will need to change to become more horizontal. It cannot become completely horizontal, because this may eliminate the balance inherent in a teacher-student orientation. Furthermore, trying to adopt a horizontal structure without changing the leadership style may lead to problems with effectiveness, since a leadership level of three provides limited support for new ideas.

### **General discussion**

From the analysis using the T&S leadership continuum, only the Canadian teachers were able to reach level 6. Level 6 and 7 are best for a global society since they are the most empowering for individuals, encourage diversity of opinions and

cooperation, and require mutual understanding and respect in order for the decision-making to occur successfully. Since the Canadian teachers reached that level, their comments suggest they interact with their students in a way that empower students to make meaningful decisions in the classroom. Of course, these rankings are based on their comments so it is possible that the teachers only think they are empowering the students. Comments from the Canadian students did not indicate one way or the other, since they were silent on the topic of their decision making in the classroom (e.g., nothing was said about whether they decide project topics or teachers decide those topics). However, since the remaining participants were below level 6, it is likely they did not consider the distributed decision-making of high T&S levels to be useful or important. In the Turkish and especially the Iranian schools, the principals were constrained to behave in a way corresponding to low T&S levels. However, both the teachers and principals in the Turkish and Iranian schools did not indicate a high desire to engage others in the dialogue and empowerment necessary to reach level 6; they all said that hearing opinions of others was good, but then indicated that it was necessary for them alone to make the decision. For the Turkish and Iranian school to follow the suggested global model of education, there will have to be attitudinal changes regarding empowering others as well as structural changes so that leaders actually can include others in the decision-making process.

From the analysis of Senge's Three Leadership Characteristics, the Canadian teachers and principal showed a degree acceptable to be consistent with the proposed global education model. However, the Iranian and Turkish participants did not. In particular, the principals were ranked as poor designers. Being a good designer is a

necessarily quality for the global model because it means they have the flexibility to handle diverse people and opinions as well as changing and dynamic conditions. Given this poor ranking, it is likely principals do not want to handle circumstances outside of the expected or routine operations. Such expectations are also consistent with a strong hierarchical organizational structure, which also characterized these schools. When looking at Senge's Five Principles though, the situation is not much better. None of the case studies were high only all five principles, and the systems thinking principle was frequently ranked as 'poor' among participants. A poor ability to engage in systems thinking is again consistent with difficulty handling complex situations, since systems thinking is one of the best ways of being able to think about complex situations. As well, all of the participants only ranked as 'moderate' for the mental models principle. It seemed as though they were aware of what it meant to have mental models and the importance of being aware of your own mental models. However, none of the participants talked about mental models in a way that suggested they encouraged or helped others examine their own mental models; at best, they mentioned doing so was important, but not that it happened within their classes or part of mentoring from a principal. Such a result is expected since none of the teachers engaged in activities like in-class metacognitive training or critical pedagogy, which would be appropriate methods for helping students examine their own mental models.

While the T&S continuum and Senge's characteristics and principles look at leadership, the INVEST analysis provides information about the organizational structure. Looking at the results of the INVEST analysis, all of the case schools have areas that need improvement. In particular, the dimensions for Vision for the future and

Transforming structures both need significant improvement for the schools to be consistent with a global model. These dimensions are discussed in more detail later in this Chapter. In general though, the organizational structure of the schools was sufficiently hierarchical and inflexible that it would be difficult for the teachers and principals to behave consistently with the proposal global model; the structure simply does not support the degree of openness, empowerment, and self-direction needed.

The difficulties faced by the lower scores in Senge's characteristics and principles, and the lower scores from the INVEST model, are interrelated as was discussed with Figure 5.1. The more difficulty a leader has with Senge's three characteristics, the more difficulty he or she will likely have with the five principles. Furthermore, even having a high score on both the characteristics and principles will not help if the structure is not supportive, as was seen with the difficulties in INVEST. The Canadian school fared the best, which might be expected given the greater degree of individual freedom and empowerment the teachers and principals have been exposed to, but they still fell short of the levels needed for the global model.

In light of the results, the Canadian case study ranked the highest in terms of the global model and the Iranian and Turkish ones ranked low. Likewise, based on the 2030 global educational goals from the UN, Turkey and Iran have some problems (such as gender equality and questionable governmental ideology). However, the Iranian and Turkish case studies may not be *bad*; based on Contingency Theory, the approach taken by the schools in those two case studies may be appropriate for their situation. If they want to cooperate with other countries such that their education systems are supportive of a global society (i.e., their education system promotes attitudes such as mutual

understanding) then there needs to be improvements in their education system as was discussed in this Chapter.

*Unusual and unexpected results.* There were a few unexpected results of this study. In the Turkish case study, the school board members, teachers, and students were all interested in my research and wanted to assist. However, the principal of the school was not that cooperative. Although he answered some of my questions, this was only after the board arranged the meeting for us and he explained that he had little time for an interview. His behaviour was consistent with his interview comments: that he was open to new ideas, but still believed he should make decisions and needed to heavily monitor the students. As well, I noticed that families seemed to play an important role in the motivation of students. This was not something that I had planned to investigate, but this data from Turkey suggests it should be explored in future research.

In the Iranian case study the school board and school members were all supportive of this research, and tried to ensure that I was able to conduct this research without trouble. I was also surprised at how candid and open participants were about the differences in wealth; one teacher described the different categories of schools as directly tied to family wealth. Even if this is not the case, it is unusual for teachers to talk about such things this openly.

In the Canadian case study, the school board and participants were also supportive of this research. However, I was surprised that the school board wanted to know who the participants were, since this may have affected the participants' willingness to say something that might be negative against the school or school board. I did not see any such comments, but the possibility may have been there. I was also surprised that,

although the teachers had a democratic leadership attitude, they were not using active learning techniques or critical pedagogy. This was one major area of improvement needed in the Canadian school, but was still something unexpected to me given how much active learning is discussed in the Canadian academic literature on approaches to learning. A third surprising result was finding a patriarchal-cultural approach discussed by one of the students. CS1, who was a female student, talked about her interest in biology as her motivation for studying. CS2 on the other hand, the male student whose family had an Arabic and Islamic-cultural background, described how his motivation for studying was primarily for work; he only wanted a stable job, and figured a university degree would be enough for this but would do more schooling if necessary for a better job. In other words, CS2's motivation in school was very much the same as the motivation from traditional patriarchal cultures, where the men need to think about finding a good job because they are the only ones who can work. This was still the case even though this student's mother had a PhD degree, and he had been educated in Canada, so the Canadian education system had not encouraged this student to critically examine his own cultural background nor think about learning for less purely economic reasons.

***Significance of this research.*** The data I have collected indicates that none of the countries are ready for a global education model. In particular, none of the schools are implementing active learning, critical pedagogy, metacognitive strategies, or other such methods; these schools are not empowering students to take control of their own learning and nor helping students develop the capacity to engage in mutual dialogue with their peers in a way that is respectful and open minded but critical of, and willing to challenge,



existing worldviews of all members of the classroom. However, this result may be unsurprising since the schools are also having difficulty with the leadership style and organizational structure dimensions that would encourage and support an active learning approach. Only Canada shows promise in this area, with a leadership style that is highly democratic and an organizational structure that is a learning organization to a moderate degree (5 to 7 out of 9); such support means Canadian schools could start implementing active learning methods, but they are still limited due to a hierarchical structure in the overall education system and a lack of shared vision among the school members (principal, teachers, and students) for the future of their education.

Although Canada has the best results and it seems like its education system will be improved given the UN 2030 goals, Turkey and Iran must improve many issues in all three dimensions both within their schools and the overall education system. The United Nations has enough information about the educational situation of member countries, so the 15-year time period for improvement until 2030 should be sufficient time. Now is a good opportunity to develop their education system. Otherwise, after 2030, the education gap between various countries may increase. Despite this possibility, none of the three studied countries seem to have completed the UN 2030 goals and need to change if they plan to meet those goals. Their current state might be acceptable, but they are not at a state where they successfully implement the model for global education leadership. In all three areas (leadership style, organizational structure, and approach to learning) the studied countries need improvement.

While developing this research I started with exploring leadership style and its relationship to organizational structure. However, I quickly noticed that these two topics

are highly interconnected: the possible leadership styles that can be used depend on the organizational structure, and the structure can be improved (or degraded) depending on the leadership styles that are used. At the same time, when exploring the literature on leadership in education I realized that the approach to learning that is taken is also highly interconnected to both the organizational structure and leadership style. For example, if a leader uses a highly authoritarian style (where they do not gather or use much feedback from others) then this style is more consistent with a hierarchical and inflexible organizational structure as well as a passive approach to learning (since the leader expects others to learn from his or her wisdom rather than engage in dialogue with students). This idea suggested to me that a country can move its education system towards a more global model only if all three dimensions are improved; improving one is unlikely to have the full effect unless the other two are also improved.

The interview data that I collected supported my idea that the three dimensions were interrelated, and there were supporting comments across the dimensions. Whenever people talked about the leadership style, and how democratic or authoritarian the style might be, their answers were consistent with comments about how flexible or inflexible their school's organizational structure was. However, this only indicated something about what the participants thought about their school, and it also said little about how to practically improve the situation. After studying the agenda of Education 2030, I noticed that it was also consistent with my model about how to push for educational leadership that was more global in nature. However, the UN only provided general objectives for each of the topics, and did not write a prescription to different countries or the areas of the world about how to achieve these goals. The UN document also did not talk about the

three dimensions of my model (leadership theory, organizational theory, and active learning). As such, this dissertation can provide some more concrete recommendations of how these schools can improve to meet the 2030 goals as well as provide a means for measuring differences between countries (and schools within a country) in terms of their closeness to completing those goals and areas that still need improvement.

### **Towards a leadership model for global education**

As previously mentioned, a global society is distinguished by both diversity of individuals and groups and their high degree of interconnectedness. As such, any model for educational leadership in that context needs to encourage cooperation and mutual understanding. Furthermore it needs and encourages meaningful conflict resolution, since the interconnectedness and diversity of individuals can cause conflict and contention. Such a society cannot function without effort placed on understanding and working together; hence, educational leadership needs to emphasize such attitudes, in addition to whatever curriculum content needs to be taught, as well as express those attitudes in their behaviour and thought. As discussed in Chapter Two, a potential model for a global society would benefit from using a transformational leadership style and a higher level in the Tannenbaum and Schmidt's leadership continuum (level five, six, or seven). In such configuration the organizational structure is more horizontal than vertical and then the organization is highly ranked as a learning organization (at least level six or seven, preferably eight or nine, on all INVEST dimensions). Lastly, there is an active learning approach to education that uses critical pedagogy.

When this theoretical model was explored in the case studies, none of the studied schools implemented it fully. The model was the most implemented in the Canadian

school, but some of the INVEST dimension scores were quite low (Vision for the future and Transforming structures in particular), the teachers were only using active learning in a limited sense, and critical pedagogy was not being performed at all.

The case studies did not provide alternative theories to consider. In the Canadian case study, the areas in which the principal, teachers, and students wanted to see improvement were consistent with the model already theorized. In other words, they wanted a leadership style that was more transformational than transactional, an organizational structure slightly more horizontal than vertical, an organizational structure that was better as a learning organization, and a more active and critical approach to learning. In the Turkish case study, the participants were interested in some aspects of the global model, such as an active learning approach, teamwork, and higher degrees of a learning organization. However, the principal and teachers in the Turkish case study were less open to a more horizontal structure, a higher degree of leadership delegation (i.e., they were hesitant to change their leadership style so that they would rank higher on the Tannenbaum and Schmidt leadership continuum), and a Vision that could be changed or adapted (i.e., the principal was opposed to behaviour consistent with a higher score in INVEST). The teachers and principal in the Iranian case study expressed similar concerns as in the Turkish case study, except they also suggested that teamwork would be difficult to implement. However, in the Iranian case study, the principal and teachers seemed opposed to higher degrees of leadership delegation and a more horizontal structure on the grounds that it conflicted with government policy.

After examining the opinions, behaviours, and attitudes of the participants in all three case studies it seems as though the theorized global model presented earlier remains

appropriate. In other words, none of the methods, theories, or leadership styles that were evident in the Canadian, Turkish, or Iranian schools went beyond the literature already reviewed and none were deemed more appropriate for a global education model than what was already theorized. Thus, it seems as though the global model developed from the literature would lead to educational leadership more supportive for a global society. It also seems as though the participants already desire this model to some extent, but that there may be some hesitation or resistance to adopting it.

*Adopting a global model.* In the analysis conducted thus far, the Turkish and Iranian schools did not appear to be closely aligned with the proposed global model. The school in the Canadian case study was seen as also needing improvements in some areas, but appeared to be closer to the proposed global model. In considering how the Iranian and Turkish school might improve their alignment with this model, one strategy could be to expect them to adopt the approach taken in the Canadian school. However, looking at the long history of developing educational policies, a copy-and-paste approach is not only controversial but also often ineffective (Zymek & Zymek, cited in Ochs & Philips, 2004). The process that tends to work is for a country to analyze policies of another country and determine how best to localize that policy. In other words, educational policy makers might look at the policy and see how aspects of it could be adapted to the circumstances of their country. This is actually a glocalization approach, since it recognizes the global nature of looking at policies that would be appropriate (and a global model of education) while also realizing that the policy needs to be adapted to the local context. One method that has shown some potential involves following three steps: policy borrowing, policy learning, and policy dialogue (Tabrizi & Kabirnejat, 2014).

Policy borrowing is the process by which a country actively looks at policies in place in other countries and chooses to adopt them (Ochs & Philips, 2004). The problem with policy borrowing is that it does not require any major analysis of the policy in terms of implementing it. Thus, policy makers could find some ‘best practices’ in the policies of another country, and then copy them without putting much thought into how best to apply these practices or whether they are even appropriate for their own circumstances (Chakroun, 2010). To avoid these problems, the second step of policy learning can be performed. Policy learning involves analyzing policies for their use in different contexts, so as to understand a policy’s implications for a certain situation, clarify alternative strategies, or determine appropriateness of a policy for a given situation (Chakroun, 2010). In other words, policy makers can use policy borrowing to find policies that could be useful but then engage in policy learning to determine whether the chosen policies actually would be useful and what difficulties may arise when trying to implement it. Lastly, policy makers could use policy dialogue. Policy dialogue is a process whereby policy makers engage in open discussion with various individuals, often ordinary citizens, to better understand the implications of a new policy and determine how best to design and implement the policy (Tabrizi & Kabirnejat, 2014). For education policies, a policy dialogue would involve school administrators and staff, students, parents, and other community members so that various stories about the existing circumstances can be shared (Winton, 2010). This provides policy makers with a more realistic perspective of the local circumstances, making it easier to create policies appropriate to the existing circumstances of the country. This method of gathering public opinion and support can be very effective, and citizens are very capable of participating (Hart & Livingstone, 2009).

Tabrizi and Kabirnejat (2014) has discussed what this would look like in the context of education policy, building on the model presented by Philips and Ochs (2003) shown in Figure 6.2 below.

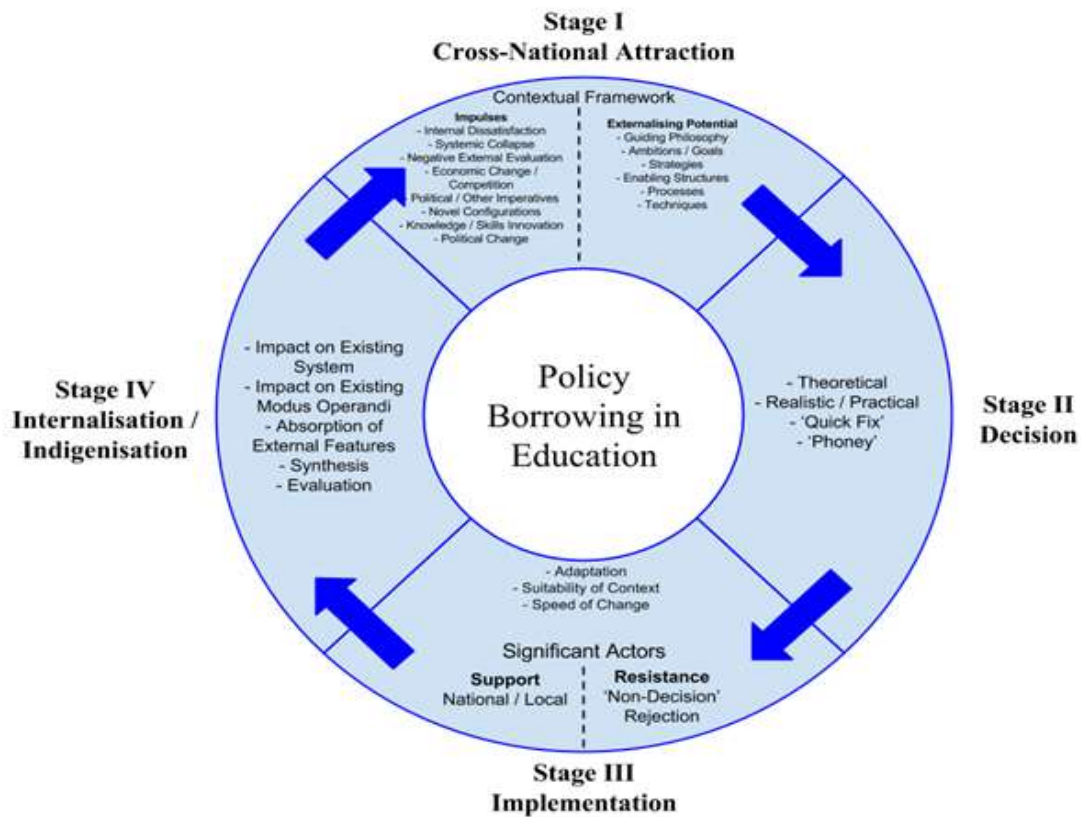


Figure 6.2. A model of the policy borrowing process for education (from Philips & Ochs, 2003).

### Conclusion

The purpose of this research was to explore educational leadership that has been theorized or used in three countries and cultures (Canada, Turkey, and Iran) in terms of three dimensions (leadership style, organizational structure, and approach to learning) so as to identify a model for educational leadership that is appropriate for a global society.

In particular seven research questions were explored, each of which focused on a particular theory or set of theories:

1. What leadership styles are used in the public education systems of the studied countries? (i.e., are the school leaders using a transactional or transformational leadership style?)
2. To what degree are these leadership styles authoritative or cooperative, as measured by the Tannenbaum and Schmidt model (Tannenbaum & Schmidt, 1973)?
3. Are the organizational and educational structures of the education systems of the studied countries more vertical (i.e., top-down or hierarchical) or horizontal (i.e., team-based) in nature?
4. To what degree are the schools in the studied countries learning organizations, as measured by the INVEST model (Pearn, Roderick, & Mulrooney, 1995)?
5. What approaches to learning are in use? (e.g., do the methods encourage personal growth? Do they instead encourage conformity? Or adapting to change? etc.)
6. If a school is using a leadership style, organizational structure, or approach to learning that is maladaptive for a global society (e.g., the style promotes inherent superiority of one group over another, or highly centralized decision-making, or uncritical conformity to one group's ideology) then what are some factors that could prevent or delay changing to a more adaptive style?
7. What could be an appropriate model for educational leadership for a global society? (i.e., what leadership style, organizational structure, and approach to learning could work best for education in a global society)



To investigate RQ1, participants were interviewed to determine whether the principals and teachers followed a transactional or transformational leadership style. The results indicated that the Turkish and Iranian principals and teachers follow a transactional leadership style, but the Canadian principal and teachers seem to be moving towards a transformational style.

To investigate RQ2, participant responses were evaluated to determine where the principals and teachers were positioned along the Tannenbaum and Schmidt Leadership Continuum (Tannenbaum & Schmidt, 1973). The teachers and principals in the Turkish and Iranian case studies were all ranked at level three out of seven, which corresponds to the leader making decisions without input from others but engaging in dialogue with others so subordinates can better understand the decision and its implications. In the Canadian case study, the principal was ranked level five and the teachers were ranked level six. This meant that the principal, as a leader, identified problems and then got input from others on what possible solutions could be chosen and which would be best, but the leader is still the one who makes the decision. For the teachers, they identified the problem, defined the limits of the possible solution, and then facilitated discussion and group decision-making so that others were engaged in suggesting and deciding the solution.

To investigate RQ3, the interview responses were analyzed to determine whether the schools followed a more vertical or horizontal structure. The results indicated that all of the schools follow a vertical structure. The school in the Iranian case study was the most vertical. The school in the Canadian case study was the least vertical, but not to the

point of being horizontal, although the teachers and principal seemed to desire a more horizontal structure for their school.

To investigate RQ4, the teachers and principals were ranked according to the three leader characteristics from Senge (1990), the five leadership principles from Senge (1990), and the INVEST model from (Pearn et al., 1995). The students were also ranked according to the INVEST model. Most of the interview questions, and the longest analysis, was conducted on the INVEST model since it is the more direct for measuring learning organizations (i.e., how well the individuals in an organization adapt to change and promote, facilitate, and support the continual learning of all its members; Senge, 1990). The results indicated that the Turkish and Iranian teachers and principals were more limited in the designer characteristic than the Canadian teachers and principal, but the other two leader characteristics were high for all three case studies. In addition, the Turkish and Iranian teachers and principals suffered from a lower mental model dimension than the Canadian participants.

Further in relation to RQ4, the results for the INVEST dimensions indicated that the Canadian participants scored the highest, while the Iranian participants scored the lowest. Not all of the scores followed this pattern though. For example, the Iranian teachers scored the lowest in the Nurturing culture dimension but scored the same as the Turkish and Canadian teachers in the Vision for the future dimension. Furthermore, although the Canadian participants scored the highest, there was still a lot of room for improvement: for instance, the Canadian teachers scored three to four out of nine on the Nurturing culture dimension. A summary of the full details can be found in table 5.18, but a few important points should be mentioned. The highest scores (six to seven out of

nine) were the Inspired learners dimensions for the Canadian and Turkish students, the Vision for the future dimension for the Canadian principal, and the Supportive management dimension for the Canadian principal. The lowest scores (one to two out of nine) were the Supportive management dimension for the Iranian students and the Nurturing culture dimension for the Iranian teachers. In addition, all of the teachers and students ranked the same on Vision for the future dimension (three to four), and all participants except the Canadian principal scored the same on the Transforming structures dimension (three to four). Lastly, the most common score was three to four out of nine, indicating that all of the schools had aspects that were significantly lacking in terms of being a learning organization.

To investigate RQ5, participant responses were analyzed to determine whether active or passive learning was more prevalent. The results indicated that the Canadian principals and teachers were aware of active learning techniques (e.g., metacognition, collaborative learning), wanted to use them, and in many cases they were trying to use them. However, the Canadian students seemed unaware of the active learning techniques, which suggested that they mainly experienced passive learning. The Turkish principal and teachers were aware of many active learning techniques, but were unwilling to use them except in very specific circumstances. The Iranian participants were largely unaware of the active learning techniques, and primarily used passive learning.

***Model for a global society and difficulties for implementing it.*** For RQ6, comments from participants were explored in the wider context of their case study. In particular, the comments were compared against the needs of an educational model for a global society. Thus, when exploring possible difficulties in implementing a global

model, topics to explore included potential difficulties for shifting from a low to high INVEST level.

Three main subjects were worth exploring for RQ6. The first was that the current government approach of Iran and Turkey are focusing more on a religious ideological approach, such that certain approaches that may contradict or challenge this ideology are opposed within the system. This is difficult for active learning and especially critical pedagogy that might want to challenge existing ideologies, or a leadership style and organizational structure that encourages more distribution of authority. The second was that the United Nations Sustainable Education Goals for 2030 was a good practical example of certain attitudes, behaviours, and goals that would be appropriate for an educational system that promotes cooperation. Some of these goals could be difficult for the Iranian case study in particular, such as equitable education, due to enforced gender roles, and limited emphasis on diversity and peace. The third was that all of the case studies had difficulty with the Vision for the future, Supportive management, and Transforming structure INVEST dimensions.

For RQ7, the model of educational leadership for a global society that was developed from the literature seems sufficient. This model includes a transformational leadership style, a high level of delegation (five to seven) of the Tannenbaum and Schmidt model, an organizational structure that was a more horizontal than vertical and was a learning organization (i.e., level seven to nine of each INVEST dimension), and an active learning approach using critical pedagogy. None of the participants were engaged in or suggested practices that were more appropriate for a global society than what was suggested by this model. Furthermore, it seems that many components of this model were

desirable by the participants (such as the transformational leadership style and active learning), but other components (e.g., critical pedagogy) would be difficult to implement for reasons explored by RQ6.

When considering this model of educational leadership in the studied schools, all of them fell short to some degree. Some of the measured dimensions were close to what this model might look like, such as the high designer characteristic of the Canadian teachers or the Inspired learners dimension of the Turkish students. However, these were isolated results; the whole model needs to be consistently high given the interconnectedness of the various parts. In other words, the leadership style, organizational structure, and approach to learning all need to be at the level described the model and this was not true of any of the case studies. It is also very probable that, at present, no school can fulfill this model; as the Canadian case study shows, even if there is a desire to have a leadership style with the appropriate T&S level and use an active learning approach, the organizational structure of the whole education system is still very hierarchical. An individual school might be able to fulfill the requirements of a Learning Organization, but to do so at the level of a Ministry of Education currently seems far more difficult.

In the context of a global education model though, a country would need to adopt a policy whereby their education system not only encourages a learning organization approach but also considers cooperation and openness to diversity. For there to be openness to diversity though, it is necessary for a country's policy makers to consider the diversity within their own country. This is where policy dialogue becomes highly

important, to ensure changes to the education system does not restrict any particular group from participating.

*Future work.* Although this research is focused on suggesting an educational leadership model for a global society, more work needs to be done to better elaborate what such a model would look like and what policies could be good for policymakers to explore in order to implement that model in their own country. However, several other variables and factors that seemed relevant for this research could also be explored. For example, the role of family seemed to be important for the Turkish case study. Future research could explore what role family is playing in all three case studies, and how family relationships could be integrated into a model for a global society in a supportive and positive manner. In addition, more schools could be studied to identify additional potential problems for a global model and to better compare schools that might be more effective at some of the studied topics (e.g., active learning, learning organization) with those that struggle in these areas.

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## Appendix

**Question Regarding Learning Organization (Teachers & Principals)**

INVEST	Questions
Inspired learners	<ul style="list-style-type: none"> <li>● How motivated are you to learn? Why?</li> <li>● What do you think is the source of your motivation to learn?</li> <li>● Who do you feel is responsible for your learning? Why do you feel this way?</li> <li>● What do you think of self-actualization?</li> <li>● What about group-actualization?</li> <li>● Do you think self- and group-actualization are necessary things to achieve? Why or why not?</li> <li>● Do you believe that self-actualization should be a personal objective? Why or why not?</li> <li>● What experience or value do you gain from mistakes, if any?</li> <li>● Do you think each person has an opportunity to grow from their experiences, both good and bad? Why or why not?</li> <li>● What are your thoughts on self-improvement? Do you think this is necessary?</li> <li>● Do you believe that self-improvement should be a personal objective? Why or why not?</li> <li>● How motivated are you to learn new things?</li> <li>● How motivated do you think others in your school are to learn new things?</li> <li>● What relationship do you think exists between someone's learning and his/her performance?</li> <li>● What do you think of the status quo of your school?</li> <li>● Do you think others would agree or disagree with you?</li> </ul>
Nurturing culture	<ul style="list-style-type: none"> <li>● What are some principles of your school for personal learning?</li> <li>● What are some principles of group learning?</li> <li>● What are some principles of personal and group learning at the institutional level?</li> <li>● What happens if someone tries to go above and beyond expectations? (e.g., are they rewarded, what kind of reward, are they ignored, is there jealousy from colleagues, etc.)</li> <li>● What support do you think the general climate of your school gives for mutual respect, precision, and trust?</li> <li>● What are your opinions of learning from daily experiences and logical debates?</li> <li>● Do you feel these are worthwhile activities?</li> <li>● What do you think the school staff feels about existing procedures?</li> <li>● What kind of encouragement, if any, is there to support these procedures?</li> <li>● What kind of encouragement, if any, is there to challenge these procedures?</li> <li>● What do you think of brainstorming or consulting with other staff members?</li> <li>● Do you think other staff members feel the same as you?</li> <li>● Do you feel that your school overall agrees with you?</li> <li>● What is your school's policy on learning from mistakes?</li> <li>● What is your school's policy on rethinking and reviewing?</li> <li>● What is your school's policy on self-directed improvement?</li> <li>● Is there any institutional pressure on staff members for improvement?</li> </ul>
Vision for future	<ul style="list-style-type: none"> <li>● Does your school have a vision or mission statement?</li> <li>● What do you think of your school's vision? How clear is it?</li> <li>● How committed do you think other staff members are to this vision?</li> <li>● How well do you think other staff members understand this vision?</li> <li>● How available is this vision for staff members to read, review, and/or discuss?</li> <li>● How well do you think this vision could transform other staff members?</li> <li>● How well do you think this vision could transform students?</li> <li>● How well does this vision prioritize learning to cope with future uncertainty?</li> <li>● How well does this vision shape the future of the school?</li> <li>● How achievable do you think this vision is? Do you think other staff members would agree with you?</li> <li>● How consistent do you think your activities are with this vision? Do you think other staff members would agree with you?</li> <li>● In this vision, how important is learning for all institutional levels of your school?</li> </ul>

Enhanced learning	<ul style="list-style-type: none"> <li>● How widely used is mentoring among all institutional levels of your school?</li> <li>● How systematic do you think other staff members approach their work?</li> <li>● How systematically do you approach your work?</li> <li>● What learning resources are available for staff members to improve themselves? (e.g., free learning, e-learning)</li> <li>● How widely used are these learning resources?</li> <li>● How regularly do staff members apply “learning in action”?</li> <li>● Is your school part of an “alliance for learning”? If so, what effect do you think this has on the performance of your school?</li> <li>● How well does your school cooperate with other organizations?</li> <li>● How widely used are learning contracts? Are they used to clarify organizational goals?</li> <li>● What methods, if any, does your school use for detecting and discussing the mental models of staff members?</li> <li>● Does your school use learning laboratories for staff members? If so, what effect do you think this has on your school’s performance?</li> <li>● How well do educators support and facilitate learning? Do you feel as though they only teach material?</li> </ul>
Supportive management	<ul style="list-style-type: none"> <li>● How well do your superiors accept new approaches?</li> <li>● How well do your superiors help the school and staff achieve the school vision?</li> <li>● How much trust do your superiors have of staff members? How much supervision is required?</li> <li>● How actively do your superiors support you and other staff members in continual learning and personal growth?</li> <li>● What effect do you think there will be on school performance if your superiors delegated more authority and responsibility to you? What about to your fellow staff members? Do you think your superiors would agree with your analysis?</li> <li>● What do you think is your fundamental role in the school? (e.g., to be supportive? to help students grow? To help staff grow? To monitor others? Etc.)</li> <li>● What do you think is the fundamental role of teachers in the school? [For teachers, ask about the role of principal]</li> <li>● What do you think is the fundamental role of supervisors and others above you in the education system?</li> <li>● How much do you reflect on your mental models? Do you feel encouragement to do this? If so, by whom?</li> <li>● How much do your superiors reflect on their mental models? How much do they encourage you to do the same?</li> <li>● [Principal only] How much do teachers reflect on their mental models? How much do you encourage them to?</li> <li>● How much does the administrative staff of your school empower other staff members?</li> <li>● How much do your superiors encourage you to think about and review <i>their</i> opinions?</li> </ul>
Transforming structure	<ul style="list-style-type: none"> <li>● How many levels of management does your school have? What about in the whole school district?</li> <li>● Do you think there are unnecessary levels of management? If so, how well do you think these levels can be removed?</li> <li>● How responsible are your superiors for developing learning in other staff members?</li> <li>● How does your school approach teamwork among students? Among staff members?</li> <li>● What is the definition of responsibility in your school?</li> <li>● What opinion do staff members have of responsibility? (e.g., is it assessment? their job? regulation of their work?)</li> <li>● Does your school have many boundaries between teams or groups of people? If so, describe them.</li> <li>● How well can various staff members share information with each other?</li> <li>● How well does information from students travel up to the principal? To higher levels of administration in the district?</li> <li>● How aware are the various teams of their responsibilities towards students?</li> <li>● What kind of authority is delegated by administrators? How much, if any, authority is delegated?</li> <li>● Do administrators like this delegation? Do you like it?</li> <li>● How common is it for staff teams to cooperate? What is the general opinion of this?</li> </ul>

**Question Regarding Learning Organization (Students)**

INVEST	Questions
Inspired learners	<ul style="list-style-type: none"> <li>● How motivated are you to learn? Why?</li> <li>● What do you think is the source of your motivation to learn?</li> <li>● Who do you feel is responsible for your learning? Why do you feel this way?</li> <li>● What do you think of self-actualization?</li> <li>● What about group-actualization?</li> <li>● Do you think self- and group-actualization are necessary things to achieve? Why or why not?</li> <li>● Do you believe that self-actualization should be a personal objective? Why or why not?</li> <li>● What experience or value do you gain from mistakes, if any?</li> <li>● Do you think each person has an opportunity to grow from their experiences, both good and bad? Why or why not?</li> <li>● What are your thoughts on self-improvement? Do you think this is necessary?</li> <li>● Do you believe that self-improvement should be a personal objective? Why or why not?</li> <li>● How motivated are you to learn new things?</li> <li>● How motivated do you think other students in your school are to learn new things?</li> <li>● How motivated do you think the teachers in your school are to learn new things?</li> <li>● What relationship do you think exists between someone's learning and his/her performance?</li> <li>● What do you think of the status quo of your school?</li> <li>● Do you think others would agree or disagree with you?</li> </ul>
Nurturing culture	<ul style="list-style-type: none"> <li>● What are some principles of your school for personal learning?</li> <li>● What are some principles of group learning?</li> <li>● What happens if you, or other students, try to go above and beyond expectations? (e.g., are they rewarded, what kind of reward, are they ignored, is there jealousy from colleagues, etc.)</li> <li>● What support do you think the general climate of your school gives for mutual respect, precision, and trust?</li> <li>● What are your opinions of learning from daily experiences and logical debates?</li> <li>● Do you feel these are worthwhile activities?</li> <li>● What do you think of brainstorming or consulting with other students?</li> <li>● Do you think other students feel the same as you?</li> <li>● What do you think of brainstorming or consulting with teachers?</li> <li>● Do you think the teachers feel the same as you?</li> <li>● What is your school's policy, if any, on learning from mistakes?</li> <li>● What is your school's policy, if any, on rethinking and reviewing?</li> <li>● What is your school's policy, if any, on self-directed improvement?</li> </ul>
Vision for future	<ul style="list-style-type: none"> <li>● Does your school have a vision or mission statement? If so, what do you think of it? How clear is it?</li> <li>● How well do you think other students understand this vision? What about the teachers?</li> <li>● How committed are you to this vision? What about other students?</li> <li>● How committed do you think the teachers and staff are to this vision?</li> <li>● How available is this vision for students to read, review, and/or discuss?</li> <li>● How well do you think this vision could transform students? What about transforming the teachers?</li> <li>● How well does this vision prioritize learning to cope with future uncertainty?</li> <li>● How well does this vision shape the future of the school?</li> <li>● How achievable do you think this vision is? Do you think other students would agree with you? What about the teachers, would they agree?</li> <li>● How consistent do you think your activities are with this vision? Do you think your teachers would agree with you?</li> <li>● In this vision, how important is learning for all institutional levels of your school?</li> </ul>

Enhanced learning	<ul style="list-style-type: none"> <li>● How widely used is mentoring in your school?</li> <li>● How systematically do you approach your work?</li> <li>● How systematic do you think other students approach their work?</li> <li>● How systematic do you think teachers approach their work?</li> <li>● What additional learning resources are available for students to improve themselves? (e.g., free learning, e-learning) How widely used are these learning resources?</li> <li>● How regularly do your teachers use “learning in action” for students?</li> <li>● How well does your school cooperate with other organizations?</li> <li>● What methods, if any, does your school use for detecting and discussing the mental models of students?</li> <li>● How well do your teachers support and facilitate learning? Do you feel as though they only teach material?</li> </ul>
Supportive management	<ul style="list-style-type: none"> <li>● How well do teachers and administrators accept new approaches?</li> <li>● How well do teachers and administrators help the school achieve the school vision?</li> <li>● How much trust do teachers and administrators have of students? How much supervision is required of you and other students?</li> <li>● How actively do your teachers support you and other students in continual learning and personal growth? What about administrators?</li> <li>● What effect do you think there will be on school performance if teachers delegated more authority and responsibility to you? What about to your fellow students? Do you think your teachers would agree with your analysis?</li> <li>● What do you think is your fundamental role in the school?</li> <li>● What do you think is the fundamental role of teachers in the school? What about the principal and other administrators?</li> <li>● How much does the administrative staff of your school empower students?</li> <li>● How much do your teachers encourage you to think about and review <i>their</i> opinions?</li> </ul>
Transforming structure	<ul style="list-style-type: none"> <li>● How many levels of administration do you think your school has? What about in the whole school district?</li> <li>● Do you think there are unnecessary levels of administration? Why or why not?</li> <li>● How does your school approach teamwork among students?</li> <li>● What is the definition of responsibility in your school? What do other students think about this definition?</li> <li>● Does your school have many boundaries between people? If so, describe them.</li> <li>● How well do you get information about what is happening in your school?</li> <li>● How well can you give information about your school (e.g., your opinion on something that needs improvement) to your teacher? to your principal?</li> <li>● Do you think the administration of your school cares about your feedback? Why?</li> <li>● How common is it for teachers to cooperate?</li> </ul>

**Question Regarding Leadership (Teachers & Principals)**

1. What is your definition of effective leadership?
2. What is your decision-making process? In other words, how do you make decisions?
3. How many teams do you have in your organization? What are their duties or roles?
2. Within your organization, do you consider the opinions of the members of these teams? Why or why not? What needs to be changed in order to use their opinions?
3. Does your organization have an objective? Do individuals have or know their organizational objectives?
4. How can you help others achieve their organizational objectives?
5. Do you think your employees have enough motivation to work in a team? Why or why not? If it is too low, what would you do to change this?
6. What motivational factors are used in your organization?
7. How do you monitor and control discrimination?
8. What is the relationship like between people in your position and parents?
9. How would you create or improve your relationship with parents?
10. What do you think about your students? What strategy do you use for improving their knowledge and skills?
11. How do you define success for educational leaders?
12. What is your strategy for providing a vision for the school system?

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