2019-09-20

Creating Coherence Through Implementation of a Strategic Plan: A Case Study

Stensland, Tim

UNIVERSITY OF CALGARY

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by

Tim Stensland

A THESIS

SUBMITTED TO THE FACULTY OF GRADUATE STUDIES

IN PARTIAL FULFILMENT OF THE REQUIREMENTS FOR THE

DEGREE OF DOCTOR OF EDUCATION

GRADUATE PROGRAM IN EDUCATIONAL RESEARCH

CALGARY, ALBERTA

SEPTEMBER, 2019

Abstract

Using case study methodology, this study examined the experiences of 6 senior educational leaders to understand (a) how do school jurisdictions' senior administrative decision-makers define coherence, and (b) how are those leaders involved, directly and indirectly, in contributing to the development of coherency during the implementation of the district's strategic plan? Data were gathered through semistructured interviews, artifacts, and reflexive memoing. Three key findings emerged: coherence was defined as a clear strategic priority supported by a shared understanding and a common leadership approach to facilitate its development in the organizational structure, coherence is created through the enactment of the strategic plan, and there was little consistency in the implementation and enactment of the strategic plan. A disconnect was evident between policy implementation and policy enactment in matters of strategic planning. The leaders' day-to-day decision making and actions required to create coherence were strained under the organizational structure within which they worked; the binary relationship between formulation and implementation, or thinking and action; the challenging transition from the analytical process of planning, deduction, or reductionism to synthesis; and the challenge of moving from a linear process of planning to an iterative process which supports the emergence of strategic priorities and the development of coherence. Results suggest that the complexity of creating coherence makes it important for organizations to clearly define the outcome and that the common practice of strategic planning needs to be reconsidered if coherence is an intended outcome.

Acknowledgements

I would like to thank the many people who stood by me during my doctoral study.

Thank you to my supervisor, Dr. Sharon Friesen, for your unwavering support, encouragement, guidance, and wonderful dialogue. Your willingness and availability on this extended journey are truly valued and appreciated.

Thank you to my supervising committee members, Dr. James Kent Donlevy and Dr. Dianne Gereluk, for the wonderful questions you posed that broadened and deepened my learning for this study. The support throughout the phases of candidacy, research, and writing have been most helpful and valued. Beyond my committee, Dr. Jim Paul and Dr. Brenda Spencer really listened to what I was saying and helped me to extend my inquiry as a doctoral student to a deeper level of awareness. Also, I would like to thank Karen Crosby, my editor, for the wonderful work on copyediting this thesis.

I extend a true appreciation to the participants of this study. I feel honoured to have worked with the wisdom and understanding that you laid bare through the research process.

I truly appreciated being in a cohort for this study and the many colleagues along the way who engaged with me in dialogue about coherence.

I could not have done this work without the generous understanding and patience of my family. My wife Karen never questioned the time I dedicated to this work, and my kids, Annika and Spencer, always understood and encouraged me. Your support and encouragement were incredibly important to my successful completion of this study.

I look forward to our time ahead when I am not taking half the day for doctoral work and can dedicate full days to the family.

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Chapter 1: Introduction to the Study

The idea for this study emerged from my work in school jurisdictions, my work with the Alberta Ministry of Education, and my doctoral studies. In the initial proposal for this study, I pondered how some changes or initiatives in a school jurisdiction could be implemented almost seamlessly, whereas others appeared to encounter obstacles and never gain traction. I noted, through my experience as an observer and a participant, that there was complexity to what was occurring that was likely much deeper than what was being witnessed. This realization is relevant for school jurisdictions because continuous improvement is prominent in the educational discourse and is expected of them. Strategic planning and results reporting are the mandated processes within the province of Alberta to demonstrate that a school jurisdiction is improving. Darling-Hammond (2005) noted that demonstrating progress while retaining continuity and coherence creates a challenge for organizations. My goal in this study was to understand from a deeper and more in-depth level what is happening when employees are working to achieve a strategic priority within the organizational structure while at the same time retaining coherence in the organization. I focused on understanding coherence in a school jurisdiction during the implementation of a strategic plan. In particular, this study explored how coherence is defined by senior leadership and examined how coherence is created during the implementation of the strategic plan.

This chapter provides an overview of the context and background framing this study. The problem, the research study purpose, and research questions are then explained. Next, the research approach and my assumptions are explained. The chapter concludes with a discussion of the rationale and significance of this research study and definitions of some of the key terminology used.

Research Context

This study, focused on the understanding of coherence in strategic planning at the senior leadership level, occurred in a school jurisdiction in Alberta. Alberta requires school jurisdictions to

follow a mandated strategic planning and reporting process (Alberta Education, 2013). Senior educational leaders hold significant responsibility for the development of strategic plans in the school jurisdiction and are viewed as a unit of influence for understanding and maintaining coherence during their implementation. Senior educational leaders are involved in formulating the strategic plan and its strategies, creating and informing the implementation steps, and enacting those strategies and steps.

The Alberta provincial government places a high value on school jurisdiction strategic planning processes. Alberta school jurisdictions, charter schools, and private schools are required to comply with the Accountability Framework (Alberta Education, 2013), which is a strategic planning and reporting process. The Accountability Framework is a formal structure designed to "support accountability and transparency throughout the system and to ensure alignment of school authorities and schools with provincial direction" (Alberta Education, 2014, p. 3). The Accountability Framework requires the development and sharing of a three-year plan and annual education results reporting. Senior managers in Alberta Education use the results and planning documents as a foundational component for their work with school superintendents to understand their strategic plan, track progress on continuous improvement, and address challenges that they face. The Accountability Framework, which has been in place since 1995, could be changing if a pilot project on a new model of accountability, known as an Assurance Model (Alberta Education, 2013) is deemed to be the way to move forward.

The Assurance Model was developed with consideration for the potential enactment of the new Education Act (2012). The new model is based on several policy shifts, guiding principles, and implications for governance that relate to accountability in education. This model moves beyond a strict one-dimensional focus on external accountability to include internal accountability that involves "shared responsibility, community engagement, increased local direction and ensuring accountability for learning excellence" (Alberta Education, 2013, p. 7). In the pilot of the Assurance Model, school

jurisdictions have more leeway and flexibility in the strategic planning process to account for the local context and jurisdiction priorities. The Assurance Model might reinforce opportunities for increased coherence in strategic planning. This model has not moved beyond the pilot stage, and no further information has been released regarding implementation. The Assurance Model demonstrates that the government has a willingness to alter and perhaps improve the process for determining whether a school jurisdiction is meeting the accountability requirements.

The key features of the strategic plan in the jurisdiction where this study took place are as follows: the outcome and goals in the strategic plan have been consistent for over three years, and the plan is concise, with one outcome and four goals. The strategic plan has a primary focus on student success. Its foundational statement is that each student, in keeping with his or her individual abilities and gifts, will complete high school with a foundation of learning necessary to thrive in life, work, and continued learning. The foundational statement guides the one outcome in the strategic plan, student success. Four goals are identified for achieving the outcome:

- Personalize learning: Success for each student, every day, no exceptions.
- Build professional capital: Capacity building with a focus on results.
- Engage our public: Everyone participates in the success of public education.
- Steward our resources: Resource management on behalf of student learning.

Each goal in the strategic plan includes three strategies, which are then used by each department to create a department work plan. The strategic planning process used by the school jurisdiction in this study is considered a standard practice to demonstrate accountability in most public schools (Bryson, Anderson, & Alston, 2011).

Research Problem, Purpose, and Questions

Strategic planning is a deliberative and disciplined effort to produce decisions and actions that shape and guide an organization (Bryson et al., 2011, p. 3). The effectiveness of strategic planning can be a challenge because school jurisdictions are faced with political, financial, and professional pressures to change and improve, while at the same time addressing conservative forces to preserve tradition (Darling-Hammond, 2005). The tension between demonstrating progress while at the same time retaining institutional continuity and coherence creates a challenge for organizations (Darling-Hammond, 2005).

Although there is literature on the development of strategic plans and defining coherence, there is less clarity on how senior leaders go about creating coherence in the implementation of strategic plans. Detailed leader perspectives on how they describe coherence and specifically create coherence during the implementation of a strategic plan is a gap in the literature.

To explore this gap, the purpose of this study was twofold. The first aim was to understand senior educational leaders' decision-making and actions related to the development of coherency during the implementation phase of their district's strategic plan. Also, I sought to understand how senior educational leaders understand and are involved the formulation, implementation, and enactment of the strategic plan.

The following research questions served as a focus of the study:

- How do school jurisdictions' senior administrative decision-makers define coherence?
- How are those leaders involved, directly and indirectly, in achieving coherency during the implementation of the jurisdiction's strategic plan?

Research Approach and Assumptions

This qualitative study used Merriam's (1998) approach to case study. This study aligned with the qualitative research tradition because I was interested in understanding the meaning people construct as they make sense of the experiences they encounter in their world (Merriam, 1998). Case study research was selected as the methodology because it supports an "intensive, holistic description and analysis of a bounded phenomenon" (Merriam, 1998, p. 389), such as coherence. This study involved six participants from senior leadership positions. The primary data were collected through two semistructured interviews and artifacts shared by the participants.

My assumptions in this study were informed by 30 years of experience as a teacher, school-based administrator, central office administrator in a large urban school jurisdiction, associate superintendent, and senior manager in the provincial government of Alberta. During this study, I was a senior manager with Alberta Education and an associate superintendent of a school jurisdiction. As a senior manager, I worked with school jurisdictions and independent schools on strategic planning. As an associate superintendent, I coordinated the strategic planning for the school jurisdiction. My experience with centralized and school-based roles assisted me in understanding strategic planning at various levels in the organization. The many years of observation and experience with strategic planning and school improvement within organizations created my interest in pursuing this study. I have previously worked in the school jurisdiction where this research took place.

Assumption 1: Strategic planning processes can facilitate fundamental decisions and actions that can help shape, guide, and improve organizational outcomes.

Assumption 2: The jurisdiction plays a critical role in the development of coherence via leader decision-making during the implementation of the strategic plan.

Assumption 3: Retaining a state of coherence during the implementation of the strategic plan will lead to more effective implementation of the strategic plan.

Rationale and Significance

The rationale for this study emerged from the need to understand coherence during the implementation of a strategic plan in a large urban school jurisdiction. Understanding the concept of coherence in the implementation of the strategic plan might help senior executives improve plan implementation. It may also inform the development of strategic planning by helping to determine requirements for goal alignment with strategies that represent the elements of coherence. This study may also assist with understanding the ongoing practices of senior leaders to attain coherence during the implementation of the strategic plan.

The study is significant because it will help to inform educational leaders of the concept of coherence related to the implementation of a strategic plan in a large urban jurisdiction. Educational leaders hold positional authority and are responsible for institutional decision-making and implementation of strategies in the strategic plan. These leaders are important because they buffer community resistance to change, facilitate communication between schools and central office, provide targeted support to schools, and monitor compliance (Mourshed, Chijioke, & Barber, 2010). Understanding the concept of coherence from these participants is essential because they are accountable for "sustaining system improvement in the longer term through integration and intermediation across each level of the system, from the classroom to the superintendent or minister's office" (Mourshed et al., 2010, p. 81). Finally, this research may demonstrate that a focus on the concept of coherence is a viable approach to implementing the strategic plan because it provides a holistic view of the system.

Key Terminology

Case study: Case study methodology is an in-depth exploration of a bounded system (Creswell, 2012).

Coherence: In this dissertation, coherence within an organization is defined as the state in which the people within the organization exhibit a shared understanding, alignment of purposes, and collective ownership of the organization's strategic purpose. Johnson and Chrispeels (2010) referred to the importance of linkages in the organization as they relate to the why and how of the strategic plan goals and strategies. Johnson and Chrispeels further acknowledged that an organization moves in and out of organizational coherence through a flexible state of linkages during the seeking of the strategic purpose.

Leadership decision-making: The act or process of deciding something, especially for the leadership of an organization.

Policy enactment: Policy enactment occurs because policy or what the policy says cannot simply be implemented, but must be put into action, put into practice (Ball, Maguire, & Braun, 2012) with consideration of the history, context, and resources available. Enactment is where policies are "made sense of, mediated, and struggled over, and sometimes ignored" (Ball et al., 2012, p. 3).

Policy formulation: Policy formulation is often an analytical and political process (Mintzberg, 1994) resulting in a decision to determine a course of action that will address an intended outcome, policy, or strategy when considering a strategic plan. Formulation in strategic planning results in strategies which are "abstract concepts that do not exist as tangible entities" (Mintzberg, 1994, p. 240).

Policy implementation: Policy implementation is a way of describing how a "single unitary policy reform from the centre/top is worked out in practice in schools" (Braun, Ball, Maguire, & Hoskins, 2011, p. 4). Implementation refers to the hierarchical perspective that created a plan or a set of directives and outcomes to be put into action by school district leaders (Braun et al., 2011).

Strategic management: “The integration of strategic planning and implementation across an organization in an ongoing way to enhance the fulfillment of the mission, meeting the mandates, and sustained creation of public value” (Bryson et al., 2011, p. 3).

Strategic planning: “A deliberative, disciplined effort to produce fundamental decisions and actions that shape and guide what an organization is, what it does, and why it does it” (Bryson et al., 2011, p. 3).

Strategic plan implementation: “The effort to realize in practice an organization’s mission, goals and strategies, the meeting of its mandates, continued organizational learning, and the ongoing creation of public value” (Bryson et al., 2011, p. 4).

Chapter Summary

In this chapter, I introduced the contextual background of the study and outlined the problem as a lack of understanding of leader perspectives on how they describe and create coherence during the implementation of the strategic plan. The purpose of this study was to understand and render a rich account of coherence during the implementation of the strategic plan in a large urban school jurisdiction. Senior leaders’ interpretations of coherence and understanding how coherence is created were the two-pronged focus of the study. Holistic interpretations and in-depth explanations provided by senior leaders created during the implementation of the strategic plan are potential benefits of this study that may inform the ongoing practices of senior leaders in the jurisdiction under study and elsewhere.

Chapter 2: Literature Review

This critical review examines theories, writing, and previous research on senior leader decision-making and actions related to maintaining coherence during the implementation of a strategic plan in a large urban school jurisdiction. The primary focus of the review was on understanding how coherence has been referred to in the topics of strategic planning, educational reform, large system change, school improvement, school leadership, organizational decision-making, organizational effectiveness, and school jurisdiction effectiveness. The review helped to define the concept of coherence, informed the development of a theoretical framework, and assisted with designing the case study research.

The synthesis of the readings led to the development of themes based on common understandings, purpose, and identified systemic components relevant to coherence. This literature review includes a brief introduction to strategic planning; a review of coherence in the literature, including challenges to coherence and recommendations for achieving coherence; and a description of decision-making and complexity in organizations.

Strategic Planning

Strategic planning has become standard practice in public-sector organizations such as public schools, government organizations, and nonprofit organizations. It has become standard in these organizations because it is seen as effective practice, is required or recommended by funders, and assists these organizations in planning, making decisions, and acting strategically (Bryson et al., 2011). As noted in Chapter 1, strategic planning consists of several concepts and processes that help an organization to be deliberative and disciplined "to produce fundamental decisions and actions that shape and guide what an organization is, what it does, and why it does it" (Bryson et al., 2011, p. 3). Management of the plan implementation is an effort to ensure an organization is meeting its mandated mission, goals, and strategies; continued organizational learning; and the ongoing creation of public

value (Bryson, 2010, p. 255). Strategic management is "the integration of strategic planning and implementation across an organization in an ongoing way to enhance the fulfillment of the mission, meeting the mandates, and sustained creation of public value" (Bryson et al., 2011, p. 4). Bryson, Bryson, and Crosby (2009) indicated that leaders play a significant role in successful implementation of the strategic plan because the decisions they make produce an "interconnected set of activities that organize participation, create ideas for strategic action, build a winning coalition, and implement strategies" (p. 180). All school leaders in Alberta are required to participate in strategic planning.

In most of the literature, researchers seem to have taken for granted the government requirement of strategic planning and accountability processes and instead focus specifically on how school jurisdictions can work to effectively develop and implement the strategic plans (Darling-Hammond, 2005; Elmore, 2008; Fullan, 1994; Fullan & Quinn, 2016; Timperley, 2011b). There is some indication surfacing that these processes are limited in effectiveness and need to be challenged. Lissack and Roos (2001) noted that because the perception of the world is unstable and unpredictable, there are limitations to the traditional visioning and strategic planning processes. They suggested that "prediction, at best, is possible in the very short term: the dartboard works better in the long run" (Lissack & Roos, 2001, p. 57). Lissack and Roos indicated that a more effective process is to focus on being coherent through the enactment process rather than relying solely on the visioning process. In the province where this study took place, there is some indication of a willingness to examine requirements for strategic planning and school jurisdiction accountability.

Coherence

This section focuses on how coherence has been represented in the literature. The information gathered has been synthesized into subsections to define coherence, present a historical account, delineate the challenges, and outline the recommendations for maintaining coherence.

Defining coherence. An initial concept of coherence became prominent in Western philosophy during the nineteenth century (Kirkham, 1998). The early definitions of coherence emphasized the importance of a common set of beliefs, one referring to the organization as a whole and another referring to the employees or actors within the organization (Kirkham, 1998). Coherence was believed to be achieved at the organizational level when the beliefs and components of a system fit together or dovetailed with each other to constitute one unified and tightly structured whole (Bonjour, 1998). From an individual or actor perspective, coherence was idealized as "a coherent system of beliefs, as one in which each member entails and is entailed by all of the others" (Bonjour, 1998, The concept of coherence section, para. 1). Coherence was espoused by idealists as a concept that was aspired to but was unrealizable (Bonjour, 1998). This historical definition highlighted that coherence is dependent on the relationship between the individual and the organization; this notion remains a relevant component of coherence in this research because the context of a school jurisdiction is a socially constructed and networked system (Lord & Emrich, 2001).

The historical conception of coherence was not clearly defined or found to have specific qualities. Coherence was represented as vague or perhaps mystical, as if to espouse an enigmatic quality. Historically, the central problem of the concept of coherence was noted as the inability to explicate and clarify the core concept of coherence itself (Kirkham, 1998).

Beyond the historical perspectives on coherence listed above, more recently coherence has become increasingly prominent in many fields of knowledge such as organizational change, organizational effectiveness, school reform, educational and organizational improvement, and school effectiveness. The concept of coherence is often broadly defined in the educational literature, and it does not reside in a field of knowledge on its own.

Coherence is defined in the literature in two specific contexts. One perspective emphasizes the importance of linkages in the organization; specifically, a flexible state of linkages comprising resources, structure, communication, relations, and culture within an institution, which, when operating in tandem, maintain that system moving toward a specific strategic objective as articulated in the institution's strategic plan (Johnson & Chrispeels, 2010). The key element of this view is connecting the why and how of the strategic plan goals and strategies to the linkages (Johnson & Chrispeels, 2010). Johnson and Chrispeels (2010) identified important system linkages between the resources, structure, communication, relations, and ideology of the system, as well as accounting for critical interdependencies in a system. The other perspective focuses more specifically on leaders operating and interacting with purposeful action. Fullan and Quinn (2016) indicated that the "only way to achieve greater coherence" (p. 2), both on an individual and collective level, is to work towards "purposeful action and interaction, working on capacity, clarity, precision of practice, transparency, monitoring of progress and continuous correction" (p. 2). Both definitions focus on understanding and working with the state of connectedness that is maintained in a system, particularly during a change to the organization.

Despite the variety of ways that coherence appears in the literature, there are elements that can be consolidated and are relevant to this research. These include examples of frameworks or approaches for coherence (Childress, Elmore, & Grossman, 2006; Spicer, 2012; Timperley, 2011b), challenges to coherence (Adams & Jean-Marie, 2011; Darling-Hammond, 2005; Elmore, 2008; Fullan, 1994; Fullan & Quinn, 2016; Honig & Hatch, 2004; Leadbeater, 2004; Levin, 2010; Timperley, 2011b; Turunen & Rafferty, 2013; Zimmerman & Hayday, 1999), and ways of maintaining coherence (Goldspink, 2007; Hargreaves, 2010; Honig, 2003; Johnson & Chrispeels, 2010; Looney, 2011; McLaughlin, 1994; Rorrer,

Skrla, & Scheurich, 2008). The foundational details on coherence listed above highlight the components in an organization that may impact the development of coherence as it relates to strategic planning.

Frameworks for coherence. Four frameworks are commonly used to demonstrate, describe, or increase coherence in a school jurisdiction (Childress et al., 2006; Elmore, 2008; Fullan & Quinn, 2016; Leon, 2008; Spicer, 2012; Timperley, 2011b). Three of the four models are designed to maintain coherence in a school jurisdiction by targeting how the strategic priorities, components of the system, and leadership work together. These frameworks, which I discuss first, offer suggestions for creating a coherent approach that prioritizes student learning as the central focus within the school jurisdiction's current organizational structure and functioning. The other model, which I discuss last, focuses on supporting the development of a leader's knowledge, skills, and attributes to function in a model designed to maintain coherence in a school jurisdiction.

The coherence making framework (Fullan & Quinn, 2016) identifies four components critical to coherence making: focusing direction, cultivating collaborative cultures, deepening learning, and securing accountability. Although these components are critical to coherence making, Fullan and Quinn (2016) identified that leadership is at the centre of the framework in that "leaders build coherence when they combine the four components of the Coherence Framework to meet the varied needs of the complex organizations they lead" (p. 128).

The Public Education Leadership Project (PELP) was developed to increase student performance across an entire school jurisdiction (Childress et al., 2006). It was designed to help leaders in the organization "understand how their cultures, systems and structures, resources, stakeholders, and environments reinforce one another and support the implementation of strategy across schools" (Childress et al., 2006, p. 60). The goal of PELP was to put student learning at the heart of the work to build a coherent organization that could implement a strategy in a sustainable way (Elmore, 2008).

Childress et al. (2006) reported that the implementation of the model is still in the early stages, but the "results so far are extremely encouraging" (p. 56). The PELP framework is offers a holistic view of a system during change while maintaining continuous school improvement. It is designed to maintain coherence in four ways:

(1) connecting the instructional core with a jurisdiction-wide strategy for improvement,

(2) highlighting jurisdiction elements that can support or hinder effective implementation,

(3) identifying interdependencies among jurisdiction elements, and

(4) recognizing forces in the environment that have an impact on the implementation of strategy. (Leon, 2008, p. 49)

The third framework is more representative of a philosophical stance or learning system rather than a framework or model. Timperley (2011b) viewed coherence beyond maintaining consistency and focus; rather, she identified "coherence as a learning system and coherence of adaptations to teaching practices" (p. 169). The difference in this approach is that student learning is the heart, node, or nexus that filters all initiatives and strategic actions. Her approach suggests that coherence is achieved by turning the system upside down, with the primary driver being students, then teachers, and so forth. Coherence is approached through a learning system informed by an inquiry and knowledge-building cycle. She explained that this approach has the potential to close the gap between policy intent and practice by using the interpretive space to "promote learning throughout the layers in the system" (Timperley, 2011b, p. 173). Timperley's (2011b) focus is to change the way leaders and employees function in the system because they are driven by a strong focus on student learning. This intense focus on student learning may require a shift in the way leaders and employees function within the system. Lissack and Roos (2001) identified a similar focus, indicating that "coherent actions are those actions

that make sense to others in our organizations [and] . . . coherence is about acting in a manner consistent with who you are given your present spot" (p. 61) in the organization.

The final example, the Executive Leadership Program for Educators (ExEL), focuses on the professional development of leaders (Haslam & Turnbull, 2011). ExEL is defined as a strategy where "teams increase their capacity to manage human and other resources, systems, culture, structures, and engagement with various stakeholders in a coherent and integrated way, driven by a widely understood and shared improvement strategy" (Spicer, 2012, p. 316). The program is aligned with the foundational beliefs in the PELP framework, but the focus is on development (Haslam & Turnbull, 2011) of leaders' skills and knowledge to develop and maintain coherence in an organization (Spicer, 2012). The research on the ExEL program involves one study by Haslam and Turnbull (2011) that assessed the learning of the participants in the program but did not assess the impact of coherence on school jurisdictions.

The research on the frameworks demonstrates the main ways that researchers and school jurisdiction leaders have attempted to create coherence in school jurisdictions. It also demonstrates that coherence is a quality that is valued and should be aspired to. The frameworks do not provide a thorough or detailed account of how they have or have not affected coherence, and the research represents only a small number of school jurisdictions. However, the frameworks identify some of the critical components, relationships, interdependencies, culture, and alignment considerations for establishing coherence.

Challenges to coherence. Many factors can disrupt or inhibit the maintenance of coherence in the strategic plan. The key areas of disruption of coherence have been identified as responding to the political context (Levin, 2010; Turunen & Rafferty, 2013), responding to policy (Adams & Jean-Marie, 2011; Elmore, 2008; Leadbeater, 2004; Timperley, 2011b), responding to the many reform efforts and initiatives that create disjointedness and incoherence (Darling-Hammond, 2005; Fullan, 1994; Honig &

Hatch, 2004; Zimmerman & Hayday, 1999), having too much of a focus on consistency (Looney, 2011; Zimmerman & Hayday, 1999), and adopting a leadership focus on management rather than student learning (Elmore, 2002; Fullan, 2006; Hightower, 2002; Timperley, 2011a, 2011b). Each of these challenges is described in more detail below.

Responding to the political context. The neoliberal political context puts pressure on school leaders to demonstrate that the institution is productive and accountable (Zarifa & Davies, 2007). Neoliberalism, referred to as one of the most dominant ideologies shaping the world today (Saad-Filho & Johnston, 2004), involves a set of beliefs and ideas about how the relationship between the state and its external environment should be organized (Thorsen, 2010). In neoliberalism, the purpose of the state is to safeguard liberty, as well as individual, commercial, and strong private property rights (Saad-Filho & Johnston, 2004). A government with a neoliberal agenda emphasizes an education system that delivers value for the money spent, assesses how effective the education is, and determines how education could be improved (Fullan, 2009; Fullan, Hill, & Crevola, 2006; Hill, Holmes-Smith, & Rowe, 1996; Levin, 2010). Neoliberalism places a particular emphasis on market-based principles that are applied to education. The focus results in government-initiated policies that are "characterized by rational planning, economic efficiency, standardisation, intellectual capacity within the school, and a clear focus on pedagogy"(Hayes, Christie, Mills, & Lingard, 2004, p. 44).

Coherence is challenged when personnel within a school jurisdiction are unable to strike a balance between government-initiated strategic priorities and the school jurisdiction's strategic priorities. Another challenge to coherence arises when the discourse of initiatives and strategic priorities from the government does not align with the dominant discourse of the school jurisdiction, resulting in a challenge for the school jurisdiction to remain true to its purpose (Turunen & Rafferty, 2013). An

example of this conflict currently occurs when the neoliberal dominant educational discourse in education creates tension or is not aligned with school jurisdiction values.

Responding to policy. Government influences the design, intention, and approach to educational policy development and implementation. Responding to policy can create actions or outcomes that challenge coherence. Policy heavily influences the educational discourse with the predominant influence being an accountability policy perspective (Elmore, 2008). The process of policy implementation reinforces the power relationship because the "centre controls, initiates, plans, and instructs" (Leadbeater, 2004). Policy plays a dominant role in the educational discourse because school reform and change are put into required action by passing policy (Adams & Jean-Marie, 2011). This approach causes a response to a policy where people change their behaviour, individually and collectively, to meet the policy expectations (Elmore, 2008).

School jurisdictions attempt to maintain coherence as they understand, implement, and negotiate external policy demands in ways that mutually support the goals of the jurisdiction and the goals of government (Honig, 2003). A government must also consider coherence within its policy development, policy implementation, and the required reporting structures for monitoring. If government, school board, or school jurisdiction policies "conflict with one another, the enterprise lurches about like a carriage pulled by horses dashing off in different directions" (Darling-Hammond, 2005, p. 371). If either the school jurisdiction or the government is unsuccessful in maintaining coherence in developing policy or responding to policy demands, it can impact their successful implementation of a coherent strategic plan.

Responding to the many reform efforts and initiatives that create disjointedness and incoherence. School jurisdictions encounter many pressures to improve student learning that can cause disjointed efforts and have a negative impact on the coherence of a system. The problem in education is

not “absence of reform, but rather the presence of too many ad hoc, uncoordinated innovations and policies” (Fullan, 2000, p. 21). Fullan (2000) has contended that a school jurisdiction will benefit from strategic planning when the plan is selective, integrative, and focused on making connections between initiatives, activities, and priorities.

Reforms have the potential to appear clear at the top of a system or where they are initiated, but may contribute to more clutter at the bottom (Darling-Hammond, 2005) and increase the school and system overload (Fullan, 1994; Hightower, 2002). Corcoran, Fuhrman, and Belcher (2001) found that the implementation of reforms that lacked coherence with jurisdiction goals were less effective and were more difficult to scale up, whereas efforts that were able to create coherence were clearly more successful. In a study conducted on the San Diego school system, Hightower (2002) found the jurisdiction to be fractionalized and incoherent, with different parts of the system viewing the reform differently and as a result communicating different messages.

It is a reality that school jurisdictions will be expected to continually strive to improve. Reform efforts and initiatives are seen as ways to support continuous improvement and, therefore, can be expected to continue. These studies clearly state that reforms have to be designed and implemented so they are coherent with the current goals of the organization. The design of the strategic actions and the communication of the reform must be consistent across the organization. Implementing the reform in a way that prevents disjointedness within the organization will likely increase the effectiveness and success of the implementation.

Having too much of a focus on consistency. Consistency is viewed as a valued part of strategic planning and organizational functioning and is often connected to coherence. For instance, Hopkins, Nusche, and Pont (2008) indicated that consistency might be viewed as the “glue that provides cohesion . . . in an inspired effort to create a leadership culture across the system and a professional

discourse using a common language" (p. 188). Consistency in relation to coherence has been stated as necessary for system linkages (Johnson & Chrispeels, 2010), strategic planning (Reeves, 2009), alignment of strategic work (Fullan, 2000), and other areas that support stability in a school jurisdiction to support in turn the creation of coherence. A broader view of consistency suggests a new way to keep an "eye on coherence and consistency to retain the sense of urgency about learning and achievement for all students" (Sumara & Davis, 2009, p. 69).

This said, the correlation between consistency and coherence is contested. Zimmerman and Hayday (1999) indicated that too much of a focus on consistency could pose a challenge to coherence. Organizations that primarily focus on consistency become too rigid and are unable to respond to contextual changes and retain a focus on priorities, which poses a challenge for embracing diversity (Zimmerman & Hayday, 1999). Consistency alone, as the key concept of coherence, seems to insufficiently capture all that is involved in creating coherence (McLaughlin, 1994) because coherence is not straightforward. An action research project revealed that "paradoxically, the decrease in consistency increased coherence" (Zimmerman & Hayday, 1999, p. 293) in the organization.

A school jurisdiction consists of some departments that value and strive for consistency. Human resources and finance departments establish a foundation of consistency in business processes and practices. Often the success of these departments is based on a consistent application of these processes and procedures despite an ever-changing organization (Herling, 2003). Other departments and schools do not operate with the same value or level of urgency around consistent procedures. A balance between consistency and coherence is necessary "so that there is room for innovation and support for the 'softer' and less measurable goals of education, such as moral and ethical values" (Looney, 2011, p. 5). A focus on consistency reinforces sameness, whereas a focus on coherence allows for creative solutions to emerge and increase organizational coherence (Zimmerman & Hayday, 1999).

Ideally, there is a balance and awareness of between coherence and consistency. Consistency can serve an important purpose for effective organizational functioning; however, if there is too much of a focus on consistency, it may conflict with the development of coherence. Flexibility will support the development of coherence in a complex system, such as a school jurisdiction. Some flexibility is required because "coherence is not a rigid state, but rather is a process that reflects the ongoing alignment of identity, purpose, and values" (Lissack & Roos, 2001, p. 63). Implementing the strategic actions to allow for flexibility to adapt, shift, or alter the strategic actions to ensure they meet the intended outcomes is critical for attaining coherence.

Adopting a leadership focus on management rather than student learning. An ongoing challenge in education is to balance the need for effective management with the need for a focus on supporting student success in learning. For example, a focus on coherence would mean that the strategic priorities guide not only professional development, but also communication, staff meetings, and other work-related tasks to reinforce the instructional focus. Elmore (2004) asserted that change that moves entire systems has coherence, which retains a focused change sustained over time, to "raise the average level of quality and performance" (p. 66). If changes are not developed in a coherent way across all communities with interdependent partnerships that focus on improvement in teaching and learning practices, they are less likely to have an impact on student learning (Timperley, 2011b). This focus on coherence emphasizes student learning as the main strategy across the jurisdiction (Leon, 2008).

The above examples demonstrate many aspects that pose a challenge for maintaining a coherent focus on strategic directions. The challenges to maintaining coherence have an inverse relationship to the requirements and recommendations for achieving a state of coherence.

Requirements and recommendations for attaining coherence. This subsection of the review explains some of the many requirements and recommendations highlighted in the literature for

maintaining coherence, as well as the benefits of the requirements. These components include control and support for strategic planning priorities, cultural or ideological alignment, linking and connecting, communication and relational awareness, and creating coherence through an ongoing and flexible approach throughout the implementation of the strategic plan.

Control and support for strategic planning priorities. Research has suggested a need for senior leadership control of strategic planning priorities and decision-making support for these priorities to create coherence (Childress et al., 2006; Elmore, 2008; Hightower, 2002; Johnson & Chrispeels, 2010; Timperley, 2011b). Hightower (2002) found that districts increased centralized bureaucratic controls in order to build coherence and alignment across a school jurisdiction. The structural linkage was also used to exert control, complete organizational tasks, and enforce the desired changes to achieve the intended outcomes (Johnson & Chrispeels, 2010). Senior leadership control and support to create directives, and make decisions to ensure internal policies and practices focus on the priorities, are necessary for the strategies in the plan to be successful (Johnson & Chrispeels, 2010). Coherence is created and maintained when a consistent, sustained focus on priorities is achieved over time (Johnson & Chrispeels, 2010).

Goldspink's (2007) research found that "tight hierarchical/administrative control is not necessary to achieve a very high level of strategic coherence" (p. 38). Hargreaves (2010) offered a broader perspective of coherence by indicating that it was not merely bureaucratic or governmental for the purpose of control, but an inspirational and visionary perspective. The key element highlighted in the research was that creating and maintaining strategic direction, like that achieved in the development of the strategic plan, is not sufficient for creating coherence in the implementation of the plan (Fullan & Quinn, 2016; Johnson & Chrispeels, 2010). The implementation requires the control and support from senior leadership to create the conditions for the coherence and success in the implementation.

Cultural or ideological alignment. Ideological alignment refers to coherence between the goals and strategies of a strategic plan and the ideology or culture of the school jurisdiction. Johnson and Chrispeels (2010) found that "increased ideological coherence among the key stakeholders around the jurisdiction's goal of increasing achievement" (p. 768) was a critical linkage for achieving the stated goals. They suspected a gap in ideological coherence might be a significant barrier that prevents many jurisdictions from moving forward and succeeding in the process of school reform (Johnson & Chrispeels, 2010). Coherence decreased when mental models were not understood and remained below the surface (Fullan & Quinn, 2016; Johnson & Chrispeels, 2010; Senge, 1990). When mental models remained below the surface, they led to different interpretations of the same evidence (Johnson & Chrispeels, 2010). It is recommended that mental models can be brought to the surface with protocols to guide the discussion, as well as sufficient time for dialogue and a safe space to share viewpoints (Johnson & Chrispeels, 2010). Bringing mental models to the surface would mean that ideological alignment refers to how the key players in the jurisdiction—board, superintendent, senior leaders, principals, and teachers—understand the "why" or reason for the goals of the strategic plan and the "how" or strategies of the plan. Attention and awareness of beliefs around these concepts can lead to work in the relational and communication linkages, if necessary, to mitigate concerns with coherence (Johnson & Chrispeels, 2010).

Fullan and Quinn (2016) indicated the importance of having a common mindset because a "mindset of a culture of growth . . . sends ripples through organizations" (p. 49). They also found that coherence was either enhanced or diminished, largely due to mindset: "Organizations that support learning, innovation, and action build a culture of growth" (Fullan & Quinn, 2016, p. 49). Similar to a mindset, Timperley (2011b) suggested creating a culture of inquiry through learning situations that

reinforce the mindset and beliefs that are critical to have an organization focused on the strategic priority of student success.

Linking and connecting. Linking, connecting, aligning, or fitting systemic components together according to some principle has been highlighted as an important quality of coherence (McLaughlin, 1994). Overall, coherence in this context demonstrates an elasticity or tension between the value or parts of a system and their structural importance, as well as the linking between the technical and social dimensions of alignment (Looney, 2011). A clearly articulated example of this idea is the fit between external policy demands and the jurisdiction's goals and strategies (Honig, 2003), or the alignment of the jurisdiction's values with the values on school effectiveness (McLaughlin, 1994). Many have noted that the resources (McLaughlin, 1994) and infrastructure need to align with the jurisdiction's organizational purpose, values, and intended outcomes (Fullan & Quinn, 2016; Johnson & Chrispeels, 2010; Looney, 2011; Rorrer et al., 2008; Timperley, 2011b). Johnson and Chrispeels (2010) noted that effective linkages between the central office and schools need to be coordinated and in place for reform success. It was also found that beyond alignment, there is a need to sequence the topics in a way that reflects the logical structure of the organization (McLaughlin, 1994).

Communication and relational awareness. One other component, coming out of the linkages, is the need to open up the conversation and create possibility, which is essential to meeting and responding to the local context. Johnson and Chrispeels (2010) found that communication and resource linkages were essential because they were "seen as boundary spanners" (p. 739) to facilitate coherence with other linkages. Planning for communication and relational awareness, such as feedback loops, should increase the avenues for coherence. McLaughlin (1994) noted that fitting things together in the name of coherence should open up the discussion of why and what, in relation to the foundational purpose. Indeed, "emergent insights into possibilities for strategic improvement arise in systems that encourage

diversity and pluralism of perspective" (Goldspink, 2007, p. 38). A state of coherence is represented in the literature as a way to open up the conversation (Goldspink, 2007; McLaughlin, 1994) and create possibility, which is different from a time in leadership where it was of prime importance to stay the course and be consistent with the plan. Argyris (2010) found that people who operate with a productive reasoning mindset were able to make their views public and transparent, as well as allow their claims to be robustly tested, which renders the work more transparent and permits more awareness in the organization. Fullan and Quinn (2016) indicated that creating cultures where leaders model, coach, collaborate, and create joint learning in an open environment contributes to organizational awareness and communication.

Creating coherence through an ongoing and flexible approach throughout the implementation of the strategic plan. Creating coherence requires a consistent focus and effort throughout the implementation of the strategic plan. The frameworks and models previously mentioned have been designed to establish how educational leaders can more effectively focus on strategic actions. The PELP (Elmore, 2008) and ExEL (Haslam & Turnbull, 2011) frameworks concentrate on supporting educational leaders to have a coherent focus on strategic priorities and actions. Timperley's (2011b) mindset approach suggested an ongoing focus, referring to a "coherence of inquiry" (p. 165) that was an iterative cycle. Fullan and Quinn (2016), in their coherence making framework, described how the varied needs of complex organizations require leaders to build coherence. All of these models indicate that coherence is an action in which employees and leaders are actively involved in creating coherence throughout the implementation of the strategic plan.

Because creating coherence is an ongoing process, leaders must be nimble and adaptive during the implementation of the strategic plan. Lissack and Roos (2001) indicated that to maintain an ongoing focus on coherence, "the flexibility to adjust to create coherence [is] necessary because coherence

cannot be produced (other than temporarily through coercion); it must be evoked, coaxed into existence from a convergence of interactions and sense-making" (p. 68). It was also suggested that with coherence, "you never arrive once and for all, nor should you want to" (Fullan & Quinn, 2016, p. 2).

The implementation of the strategic plan with coherence calls for flexibility, allowance for diverse perspectives, and creative solutions, as opposed to established procedures, staying the course and sticking to the plan (Zimmerman & Hayday, 1999). Flexibility allows for finding one's way as stakeholders work through the implementation of the plan. Coherence must account for the strategic work to make sense on many levels (McLaughlin, 1994). As Fullan and Quinn (2016) suggested, there is no one way to create coherence; it is important to learn from the success of others but find "your own way" (p. 15).

Leadership Decision-Making and Complexity in Organizations

Leaders play a significant role in the successful implementation of the strategic plan because they make decisions to organize, develop, and engage employees in the organization around the strategies (Bryson et al., 2009,). Based on the significant role that senior leader and jurisdiction–institutional decision-making may have on coherence, I examine the research regarding the decision-making of employees or actors in organizations.

School jurisdictions are networked, socially constructed systems that require an understanding of their complexity to maintain coherence (Lord & Emrich, 2001). Simon (1979) found that the basic mechanisms of an organization are relatively simple; however, they "operate in interaction with extremely complex boundary conditions imposed by the environment" (p. 497). Simon (1991) also found that an "organization is a role system" (p. 127), which is further influenced by how people take up the roles (James, Connolly, Dunning, & Elliot, 2006), and these roles impact the way they make

decisions. These brief examples demonstrate the need to understand coherence within the context of the school jurisdiction.

Mourshed et al. (2010) found that leaders in the mediating layer—deputy superintendent, associate superintendent, and directors—are the key individuals to create coherence because they enable the opening up of channels for "communication, sharing, support, and standardization between the schools and the centre" (p. 81), and they are accountable for "sustaining system improvement in the long term through integration and intermediation across each level of the system, from the classroom to the superintendent or minister's office" (p. 81). Making decisions to maintain coherence is not as easy as ensuring the mediating layer supports the decisions, but it involves leaders making the right decisions. Research on leader decision-making has found that leaders can make bad decisions because they are conflicted between the individual good and the good of the system (Meadows & Wright, 2008), they seek only a small portion of information that might be relevant or needed to make the decision (Meadows & Wright, 2008; Morecroft, 1983; Simon, 1979), and they operate with a defensive reasoning mindset that tends to retain the status quo and prevent change (Argyris, 1993, 2010). Research has also demonstrated that leaders made better decisions when they operate with a broader understanding of themselves and a productive reasoning mindset (Argyris, 1993, 2010), a broader and more in-depth understanding of the system (Meadows & Wright, 2008; Morecroft, 1983; Simon, 1979), and better alignment with the culture of the system (Johnson & Chrispeels, 2010).

The complexity of a school jurisdiction was an additional aspect that emerged in the research that should be considered when understanding coherence in the implementation of the strategic plan. A large urban school jurisdiction serving over 200,000 students and employing over 13,000 employees, as exemplified in the current study, has inherent complexity because of the size and because it is not a linear system. School jurisdictions are "now routinely viewed as dynamic systems of adaptation and

evolution that contain multiple parts which interact with one another and the environment" (Morel & Ramanujam, 1999, p. 278). A small change that involves one or two parameters of complex nonlinear systems can "drastically change the behaviour of the whole system" (Anderson, 1999, p. 217). It is important to be aware of how the system responds during the implementation of a strategic plan because even small successive changes can result in larger cumulative effects (Hoffmann & Riley, 2002; Meadows & Wright, 2008).

Conclusion

This literature review examined the body of research that has focused on topics that inform the concept of a state of coherence in the implementation of strategic planning in a complex organization such as a large urban school jurisdiction. As well, the review assisted with understanding how senior leaders define coherence and work to attain coherence during the implementation and enactment of a strategic plan.

Chapter 3: Methodology

In this research study, I critically analyzed and came to understand how senior leaders viewed coherence during the implementation of a strategic plan. The rationale for this study emerged from the need to further understand coherence during the implementation of a strategic plan in an urban school jurisdiction. The jurisdiction was the unit of study with a specific focus on senior leaders' understandings and perceptions related to coherence. Attaining coherence in a school jurisdiction is essential, as it is with all of society's frontline social institutions, as they are expected to continuously make progress while at the same time coping with the resistance to change and the desire to preserve tradition (Darling-Hammond, 2005). Understanding how coherence is attained and maintained through senior leadership decision-making may assist researchers and senior executives in creating improvements when implementing a strategic plan.

In this chapter, I explain the research design, the methodology, and the supporting rationale for the case study research. The research design overview describes the research context, the data collection methods, and the various forms of analysis that were undertaken. Also, matters of trustworthiness, ethical considerations, assumptions, limitations, and delimitations are described.

Rationale for Case Study Methodology and Qualitative Research

This study used case study methodology, situated within a qualitative research tradition, which positions the researcher as the primary instrument for data collection and analysis (Merriam, 1998). Case study emerged in the late 1960s and early 1970s as a research methodology predominately within sociology. Most of the research approaches at that time were through a positivistic orientation; therefore, case study was slow to be adopted. However, the research community argued that alternatives were needed that included participant experiences and perspectives, and that were attentive to the process of implementation and the dynamics of events within the participants' contexts (Simons, 2009).

Researchers quickly adopted case study within the field of education as a way to understand the phenomenon being studied through their current experience.

Case study has evolved from its beginnings. It was initially challenged with needing to prove its validity and comprised two major approaches that were both extreme opposites, which resulted in definitional issues (Denzin & Lincoln, 2011). Since that time, it has developed into a set of interconnected activities involving the researcher, interpretive paradigms, and methodology (Denzin & Lincoln, 2011).

The focus and interest of this research study resided in understanding the meaning participants constructed concerning coherence. Case study, as a methodology, can reveal knowledge of "organizational, social, political and related phenomena" (Yin, 2009, p. 4) of individuals or groups and can provide an "intensive, holistic description and analysis of a bounded phenomenon such as a program, an institution, a person, a process, or a social unit" (Merriam, 1998, p. 389). Understanding the meaning people construct, how participants make sense of the experiences they encounter in their world, and how organizational, social, and political variables impact coherence were all relevant to this research. Case study was an appropriate methodology for this study because I could use it to examine coherence in a context where the conditions were believed to be relevant to the phenomenon under study and where the boundaries between the phenomenon and context were not clear (Yin, 2009). The contextual conditions were relevant to this study as they provided insights into the related organizational and social aspects (Yin, 2009).

Case study methodology had the possibility of illuminating the process of coherence rather than simply verifying whether coherence exists. Qualitative case study methodology provided a holistic description of the context that supported a deeper understanding of the intangible and relational components related to coherence. Case study methodology also provided value because it is

particularistic, meaning that it focuses on a particular program, situation, or event (Merriam, 1998). It is descriptive, meaning that it provides thick, rich descriptions of the phenomenon that is being studied (Merriam, 1998). Stake (1981) reinforced this perspective by indicating that a unique value of case study methodology that differentiates it from other research is that it resonates with one's own experience.

A goal in this case study was to illuminate a deeper understanding of coherence and potentially have readers relate this understanding to their own experience. The relevance of case study to this goal is that it is heuristic, meaning that the goal is to illuminate the reader's understanding to "bring about the discovery of new meaning, extend the reader's experience, or confirm what is known" (Merriam, 1998, loc 432). My intention was consistent with Merriam's (1998) assertion that this type of qualitative case study methodology allows researchers to understand how participants make sense of the experiences they encounter in their world.

In summary, case study methodology supported the investigation into the problem identified in Chapter 1 of this thesis. It allowed me to examine a complex phenomenon in an organizational work context anchored in real-life situations (Merriam, 1998). The goal in using case study methodology was to provide a rich and holistic account of coherence in reference to the implementation of the strategic plan, as well as understanding the leaders involved, directly and indirectly, in achieving coherence. This case study offers insights into coherence and illuminates the meaning of coherence as perceived by senior leaders in the work context of an urban school jurisdiction.

Research Overview

Context. This research was conducted in an urban school jurisdiction that is rapidly growing, both in numbers of schools and numbers of students. The organization of the school jurisdiction comprises a central office and area offices, each led by a director who is responsible for a group of principals and schools located within that area. The size of the jurisdiction makes it large enough to have

various departments that serve the school jurisdiction, including human resources, finance, a learning department, and many others.

Participant sample. The research sample explicitly focused on senior leadership in the school jurisdiction. The criteria for defining the research sample considered the level in the organizational hierarchy, the degree of centralization of the role within the organization, and the level of involvement for systemic decision-making in the role. For qualitative sampling, all potential participants in the organization who met the following criteria were invited:

- Held a senior-level position in the organization—deputy chief superintendent, superintendent, or director—for one year or more.
- Held a role that
    - was considered a centralized position or
    - was decentralized but required the employee to work partially in a centralized context.
- Held a role that directly involved the creation and enactment of a strategic plan or system decision-making and had a broad system influence.

Confidentiality of participant recruitment and selection was part of the design of this study and a condition of the approval by the university research ethics department and the school jurisdiction research department. I sent an introductory letter to the chief superintendent (see Appendix A) explaining the research and requesting the department's help in sending the introductory letter and informed consent (see Appendices B and C, respectively) to prospective participants through the Human Resources Department. The superintendent of human resources and the administrative assistant of human resources in the school jurisdiction determined the 27 employees who met the selection criteria and arranged for confidential communication to these employees. The chief superintendent was not

included in this list. The names of the potential participants were kept confidential from me as the researcher and from other employees in the jurisdiction. The qualified employees were sent an invitation via email and also received a hard copy of the invitation three days after the email. They were asked to contact me via email or phone to express their interest. A reminder email was sent out to potential participants nine days after the original email.

Initially, five individuals expressed an interest in the study and an additional seven expressed interest when the second email was sent out. This brought the total to 12 potential participants indicating their interest in participating. When I became aware there was sufficient interest, an email was sent to all eligible employees, thanking them and indicating that I had received sufficient participants for the study to proceed and that no further participants were required. One additional participant in response to the email offered to be on a waitlist for the study.

All but one of the potential participants who expressed interest met the specified criteria. One individual was not eligible due to having had less than one year of experience in the director role. From the eligible individuals, I narrowed the selection down to seven participants. My goal for the selection of applicants was to have a representative sample of leaders in the school jurisdiction. My criteria for having a representative sample included participants from a variety of service units who represented work roles with different responsibilities in the organization, participants who worked in both centralized and decentralized contexts, participants who had various leadership responsibilities, participants who varied in how they were involved in the creation and enactment of systemic decisions related to the strategic plan, and participants who had different professional training. I made the selection of the participants from those who expressed an interest to be involved in the research. The names of the participants were kept confidential.

Although I initially selected seven participants, the scheduling did not allow for one individual to be included in the first series of interviews. Therefore, this person was not included in the research, bringing the total number of participants to six. Figure 1 illustrates how the roles aligned with the degree of centralization and the level of position hierarchy. This figure illustrates that four participants held centralized roles, and two participants held roles that were decentralized but held centralized responsibilities within their role.

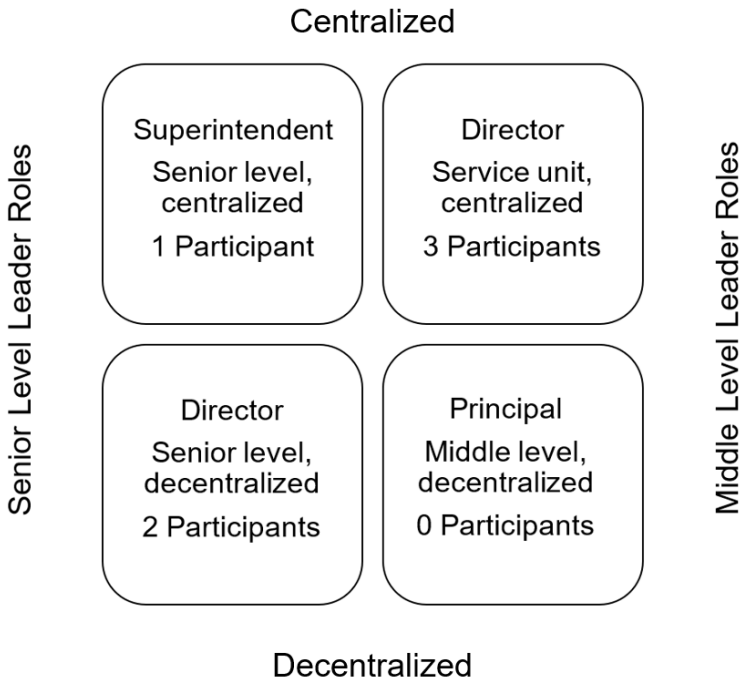

Figure 1. Role centralization: The participant role is centralized or decentralized according to the level of position hierarchy.

In addition to degree of centralization, the participant profile included the following characteristics:

- Four of the six participants had five or more years of experience in a role at the level of superintendent or director. Two participants had fewer than five years of experience.

- Four participants held roles in service units, which are designed to provide service to schools and other departments in the organization. A service unit does not provide direct service to students but provides service indirectly to students through personnel.
- Four participants held a teaching certificate.
- Two participants held a professional qualification other than a teaching certificate.
- Two participants indicated that the majority of their influence beyond their department was done through referential influence.
- All participants were directly involved in the enactment of the strategic plan and the creation or implementation of systemic decisions.

Data Collection Methods, Data Coding, and Data Analysis Methods

The design of this research allowed for data collection, data coding, and data analysis to be a recursive and a dynamic process (Merriam, 1998). The recursive and iterative process of data collection, analysis, and interpretation as defined by Merriam (1998) was relevant to this study because the research occurred in conjunction with the data collection and analysis. In this section, I first explain my process for coding for understanding and data analysis. Following this, I explain my process for collecting the data and further explain my approach to analysis and interpretation of the data for the participant interviews, artifacts, analytic memos, and interpretation and metaphorical statements.

Data collection methods. Data collection methods were selected to gain rich and holistic descriptions of coherence during the implementation of a strategic plan. It was essential to understand senior leader perceptions of how they define coherence as well as how they are involved in the creation of coherence. Data collection involved an initial semistructured interview, a reflection time of approximately 30 days, and a follow-up semistructured interview. In addition to the interviews, participants shared artifacts and examples that demonstrated how the creation and maintenance of

coherence were achieved during the implementation of the strategic plan. As a researcher, I participated in analytic memoing as a reflexive practice and as a way to capture thoughts I had throughout the data collection, data condensation, data analysis, and conclusion drawing (Miles, Huberman, & Saldaña, 2014).

Coding for understanding and data analysis. Coding was used to condense the data, as a method of discovery, and as a heuristic process to trigger deep reflection (Miles et al., 2014). Coding was a cyclical process that was ongoing from the initial review of the data through the analysis and interpretation. Coding and analysis were conducted simultaneously during the research. I used a process similar to constant comparison (Glaser & Strauss, 1967) as an ongoing strategy for building my understanding of common themes and ideas that were shared. Constant comparison allowed me to establish categories within and between levels of conceptualization and concept building. An example of constant comparison was when I picked up on a concept or something in the interview and compared this to other similar concepts that were shared or found in artifacts. Comparing information found in transcripts, my research field notes, my analytic memos, and artifacts ensured the categories were grounded in the data and assisted in reducing redundancy (Creswell, 2012).

I did not precode before the start of the data gathering. Rather, first cycle coding was done independently for each participant's first interview. I took this approach to honour the language that each participant used to speak about coherence. First cycle coding was used to interpret, "summarize, distill and condense the data" (Saldaña, 2013, p. 4). The predominant first cycle coding method that I used was descriptive coding (Miles et al., 2014). Descriptive coding accounted for the basic topic of each passage or a statement used to create an inventory of topics for each transcript (Miles et al., 2014). The codes from each participant's interview transcript were further examined to create parent categories and subcategories. The categories were further understood by illustrating them graphically for each

participant. The graphic representation showed the number of times a code was referenced; displayed the alignment of parent categories, categories, and subcategories; and displayed the variance of the categories. The graphic representation also gave me insight into the relative importance of the categories and allowed for connections and gaps to be observed.

I found there were common themes for the codes, but the language used for describing the themes varied greatly. The creation of a common set of codes that was representative of all participants' first interview data was a necessary preliminary step to assist with clarifying codes. I reviewed and refined the descriptive coding as an essential first step to prepare for further analysis and second cycle coding (Saldaña, 2013). In the second cycle coding, I worked further with the data to create more consistency and to reorganize the categories. This process resulted in a reduced and select list of "categories, themes, concepts, and assertions" (Saldaña, 2013, p. 207).

Second cycle coding assisted with moving to a more holistic and deeper understanding of coherence. A variety of types of second cycle coding were used in this research. The most predominant methods were axial coding, process coding, and pattern coding (Saldaña, 2013). Axial coding involves reassembling data and reorganizing the data to include contexts, conditions, interactions, and consequences of a process or action (Saldaña, 2013), which I found useful. Process coding methods are used to account for observable and conceptual actions (Miles et al., 2014). In this study, axial coding and process coding enabled me to understand further what the participants emphasized as their leadership priorities in the implementation of a strategic plan to create coherence and gave me insight into their orientation to action. Process coding also assisted me in understanding how leaders were involved in the process of defining and creating coherence, as referenced in my second research question.

Pattern coding (Miles et al., 2014) is another example of second cycle coding that I used. Pattern coding utilizes explanatory and inferential codes that assist with identifying "emergent themes, configuration, and explanation" (Miles et al., 2014, p. 69). Pattern coding assisted me in recognizing that all participants used metaphorical statements when they responded to the interview questions. As I explain later in the analysis, metaphorical statements and metaphors became a fundamental part of this research to further develop my analysis and establish truth-value in the research.

Analytic memoing served to assist me in engaging in a reflexive dialogue about the coding and analysis. I created over 140 analytic memos for this research, and this number brought me to realize they were an important part of this research. Saldaña (2013) pointed out that analytic memos can be "coded and categorized according to their content" (p. 50), and further stated that "even after you have coded a portion of your data and categorized the codes into various lists, analytic memo writing serves as an additional code and category generating method" (p. 51). I used an electronic research tool, Dedoose (https://www.dedoose.com/), to assist with this task. Coding of the analytic memos allowed me to begin to create the synthesis between the different interview transcripts, as well as between the interview transcripts and the analytic memos.

Dedoose was useful in working with the large volume of data and a large number of codes, as well as allowing me to understand them more holistically. Of note was the ability to include or exclude specific codes and participant attributes, to see a wide perspective of code application and code co-occurrence, and to drill down deeper into the findings using other display features. The visual representations assisted with revealing patterns, inconsistencies, potential gaps, and areas where further inquiry and analysis were required.

The artifacts collected for this research were initially understood through content analysis. I followed a structured process for content analysis that helped me prepare the data for interpretation

which then led me to code the artifacts. The majority of the artifacts required only first cycle coding through the process of descriptive coding. Coding of the strategic plan and work plans involved a more in-depth approach. These were done through both first and second cycle coding with a particular interest in process coding because of the focus on anticipated and indicated action that was referenced in the plans.

Conducting, coding, and analyzing the interviews. I used a semistructured interview format so that I could both anticipate some of the questions to draw out the participants' knowledge of coherence and keep a flexible format where the structure of the interview would not restrict the participants' responses. Qualitative interviews allowed me to capture "how those being interviewed view the world, to learn their terminology and judgments, and to capture the complexities of their individual perceptions and experiences" (Patton, 2002, p. 343) related to coherence. To fulfill this mandate, I used open-ended questions to allow exploration of the reasons for a participant's answers (Creswell, 2012) and to understand each participant's perspectives in more detail. I was aware of the importance of allowing for silence and reflection, as well as knowing when to probe more deeply to gain a thorough understanding of what the participants were sharing. As Merriam (1998) pointed out, successful interviewing relies on an interaction gained in the interview to allow the researcher a firsthand account of the phenomenon of interest.

Before the first interview, I ensured that participants understood the purpose of the study, understood what was required as a participant and allowed them to address any questions that they had about involvement in the research. As part of the informed consent (see Appendix C), participants were made aware of and agreed to audio recording and transcribing of the interviews, and they understood the terms for the disposal of these items. Recruitment, selection, and enrolment of participants met the terms

of confidentiality in accordance with the Conjoint Faculties Ethics Review Board, the University of Calgary.

The first stage of data gathering involved a 90-minute semistructured individual interview with each participant. The questions used for the semistructured interview are provided in Appendix D. All but one of the interviews went for the full 90-minute duration. Participants were interviewed at their place of work where confidentiality was assured, or they were interviewed at a neutral location that assured confidentiality. The six interviews were done within 30 days of one another.

Participants were asked to engage in a thought activity or reflection time for the 30-day period between the first and second interview. They were asked to think about coherence in their day-to-day work and bring artifacts or examples to the second interview related to coherence within strategic planning and the strategic vision of the system.

The second interview, Interview B, was held at least one month after the first interview. The interview started with the opportunity for the participants to share their reflections. Following this step, I shared a summary of the key components I had heard in their first interview. Participants were able to clarify or add to the comments that I shared with them. I prepared a list of semistructured questions for the second interview that was adjusted based on my coding of the first interview (see Appendix E). I added questions that had a more concerted focus on understanding the examples of their leadership to create and maintain coherence. The time allotted for the second interview was 60 minutes. All but one of the interviews lasted for the 60-minute duration.

I developed a structured and consistent process for analysis and data coding for the first round of interviews. I found it effective to work with each interview independently in a compressed amount of time. To achieve this outcome, I audio recorded the interview and sent the audio record to the transcription service on the day of the interview. I took personal notes during the interview, and within

two hours of the interview, I reviewed the notes to generate analytical memos of the key ideas that stood out. If I needed additional information, I referred to the audio recording of the interview. The number of analytic memos that I created for each participant varied from six to 12; they were diverse in detail and length. I believe I may have increased the truth-value of the research because I was able to complete the interview, review my notes, and create the analytic memos during the day of the interview without overlap between the interviews. This process gave me confidence that I was attending to the data when they were still fresh in my mind and allowed me to focus solely on one participant.

Keeping with my concern for a timely review of the data, I received and reviewed the transcribed copy of the interview within three days of the interview date. My process for reviewing the interview involved listening to the audio recording while reading the transcript. I applied first level coding of the interviews to identify what was emphasized and extract key ideas from each interview. The coding was further refined to identify keywords, thematic categorization, and interpretive constructs (Merriam, 1998). I created a graphic representation for each interview to ensure that I had captured the themes and interpretive constructs of each participant. The graphic representation was compared against the transcript, my researcher notes, and my analytic memos to ensure the accuracy of the thematic categorization and interpretive constructs.

This coding and analysis process allowed me to keep individual interviews separate from one another, and it allowed me to analyze each participant's interview individually. For the analysis, I thought it was important to analyze each participant's views individually in order to ensure the truth-value and trustworthiness of the research. This process honoured and identified the way each participant spoke about and defined coherence, and it also enabled me to create a synthesis of what was shared during the first interviews. After completing a graphic representation of each initial interview, I synthesized them to highlight areas of emphasis, language that was used, and areas that were approached

or defined differently. I produced additional analytic memos through the synthesis and comparison of the graphic representations. This process assisted with developing the interpretive constructs further.

This coding and analysis process also helped me to identify where I had further questions and to determine what I wanted to learn more about for the second interview. After each of the second interviews, I went through a similar process. After the initial coding of the second interview, I used the graphic representation from the first interview as a point of comparison.

The coding for the second interview was relatively consistent with the codes for the first interview but also required adjustment and refinement. I found the first interview answers were informed largely by each participant's experience related to the idea of coherence. The second interview answers still reflected the participant's experience but were also informed by the reflection time between the interviews and tended to involve more current thinking about coherence. The nature of the change in these conversations might be a contributing factor to describe why the codes required adjustment and refinement.

Collecting, coding, and analyzing the artifacts. Accessing public and private documents that pertained to the strategic plan and implementation of the strategic plan was critical to my research. The artifacts provided rich information and broadened my understanding of coherence in the research context. Artifacts were identified as an important part of this research study.

The participants were asked to consider documents, images, or other ways to demonstrate or illustrate examples of coherence in the implementation of the strategic plan. All six participants referred to documents or artifacts. I received one document during the first round of interviews, and many additional public documents were referenced during the first interviews. I located and reviewed all of them. Five of the six participants brought artifacts as examples of coherence for the second interview. Most of the artifacts proved to be examples that pertained to efforts of coherence that had already

existed in the system prior to the interviews; however, one artifact was developed between the first and second interview.

The artifacts provided as examples of coherence shared by participants included the following:

- the strategic plan and associated work plan;
- an additional work plan, a job description, and a training module related to the same example;
- an email, board reports, and other communication related to an example;
- access to a planning wall related to one example;
- a school board agenda, board reports, board presentations, board governance documents, and supporting information; and
- website information, a video, a published article, policy documents, internal support communication, external communication, and resource documents to support one example.

Beyond the documents that were provided, I searched the school jurisdiction website for public documents that applied to this research. The documents that I gathered included the following:

- school board meeting agendas, minutes, and reports;
- trustee and superintendent public newsletters, previous annual reports, and three-year plans; and
- documents that related to a specific policy initiative that was mentioned by a participant.

Artifacts revealed the details of everyday living (Merriam, 1998) about what has occurred and how it occurred in relation to the implementation of the strategic plan. I believe the documents assisted me with having a broader understanding of the context in which this research occurred.

Content analysis was used for understanding and analyzing the artifacts participants provided. I adapted a document summary template (Bloomberg & Volpe, 2008; Miles et al., 2014) to review the

documents collected. The template provided for a consistent approach to reviewing the documents using a content analysis process that considered the following criteria:

- why the document was provided;
- if the type of document was descriptive, evaluative, or other;
- if the document related to contradictory topics or other issues;
- the relevance of the documents to the research questions; and
- the keywords in the document related to first cycle coding.

I used the summary template in the content analysis as the initial step. The documents were further analyzed qualitatively for themes, recurring patterns of meaning, and insights into understanding coherence as represented within the context of the school jurisdiction. Specifically, the content analysis demonstrated that some documents might have the possibility of providing further insight central to understanding the strategic intent of leadership action to attain coherence.

To further understand if the documents could demonstrate the intent of leadership action to attain coherence, I focused on detailed coding of the strategic plan and the work plans. I used an approach similar to process coding to focus on the language of action. The process coding identified the action words used to account for observable and conceptual actions (Miles et al., 2014). Specifically, I coded the main goals and strategies in the three-year plan as well as using the same process to examine the goals, strategies, and expected outcomes of the jurisdiction work plan. This process enabled me to examine the differences in the language used for describing the action between the strategic plan and the work plans.

Collecting, coding, and analyzing the metaphorical statements. Five of the six participants shared metaphorical statements or used metaphors to refer to their understanding of coherence. Lakoff and Johnson (1980) suggested, “If our conceptual system is largely metaphorical, then the way we think,

what we experience, and what we do every day is very much a matter of metaphor" (p. 3). My intent had not been to collect the participants' metaphors of coherence, but I wanted to learn more about their individual use of metaphorical statements and metaphor. Lakoff and Johnson warned that metaphors and metaphorical statements for research should not be compared to other participants' metaphors; rather, they can illuminate an understanding of what "we perceive, how we get around in the world, and how we relate to other people" (1980, p. 3). The process I followed to better understand the use of metaphor and metaphorical statements is described below.

I reviewed the interview transcripts to identify each participant's metaphorical statements and metaphors. I then considered them in tandem with the interview transcripts, graphic representations, researcher notes, and analytic memos to create rich, holistic descriptions of how the participants individually defined and explained the creation of coherence. To ensure I correctly understood the descriptions, I charted them side by side to build a picture of what each participant had emphasized, including the metaphors. Based on this analysis, I felt confident that the metaphorical statements and metaphors were representative of what had been shared and therefore could be deemed trustworthy. This analysis confirmed for me the congruence of the metaphorical statements and metaphors with the coding. I believe an important part of this coding for understanding and analysis was to incorporate metaphorical statements and metaphor into this research.

A final step to ensure a thorough understanding of the metaphors was to relate them to the interviews and coded data. I listened to the interviews and read them back through the data sources to determine if there was congruence or areas of difference. The metaphors, the interviews, and the coded data tended to complement one another and create a more fulsome perspective. In a few situations, the metaphors resided within a singular context. Situations of conflicting perspectives or vast differences

were not apparent. The complementary nature of the metaphors, the interviews, and the coded data supports the trustworthiness of the information shared.

I believe the rigour built into the design of the analysis helped establish the trustworthiness in understanding the metaphorical statements and metaphors. They served as a way for me to have a broader and more thorough understanding of what participants emphasized about coherence. The findings, interpretation, and analysis of the metaphorical statements and metaphors are described in the following chapters.

Ethical Considerations

Ethical considerations must be accounted for in data collection, data analysis, interpretation, and dissemination of the research findings. This research complied with and conformed to the criteria and expectations of the University of Calgary Conjoint Faculties Research Ethics Board (CFREB).

I designed the research with the knowledge that there are risks in data collection that involves human subjects as participants, and therefore, ethical considerations specific to human subjects were implemented as part of the design. This research was conducted to ensure that dignity for all persons was respected and that risks were minimized. I ensured that all participants understood the purpose of the study, the research process, the data collection methods, data storage strategies, commitment of time, and participation expectations, as well as their right to withdraw their participation at any time. Informed consent was shared with participants in an introductory letter, as well as reviewed and explained to them in person, before the start of the research. Informed consent was clearly explained to all potential participants to ensure they knew they would retain their autonomy and were able to judge for themselves if the risks of being involved were worth taking (Bloomberg & Volpe, 2008).

It was important that I was reflexive and remained aware of my values and beliefs during the research study. Merriam (1998) reminded researchers to personally reflect on how we know we are not

biased and ask ourselves, how do we know we are not trying to find out what we expect to find? I tried to be aware that the researcher–participant relationship might influence what data were collected and how those data were collected. To address this concern, I talked to participants about the key ideas I had gained from the first interview at the start of the second interview. I shared the transcript from the first interview with participants and carefully compared the first and second interviews for congruence or items that were out of sync. In designing this research study, I carefully considered Merriam's comment about bias and designed the research to include analytic memoing to assist me with being reflective and reflexive to bring awareness to any personal biases I brought to the research. It was also important that I circled back to the source data regularly and triangulated my findings, interpretation, and analysis. As a researcher, I acknowledge and accept that if my biases were not controlled, I must lay bare the bias and discuss it in the written report (Merriam, 1998).

As mentioned in the recruitment and selection of participants, privacy and confidentiality were a critical part of the design of this research. To assist with these aims, I used broad, general terms for roles or departments and made sure that quotes or statements I wrote did not identify an individual, department, or the school jurisdiction. Privacy was also important when arranging for a location to meet the participants.

Trustworthiness

In this research design, I attempted to support the development of high truth-value for understanding the human experience (Sandelowski, 1986) of the participants as coherence was lived in the organization. Trustworthiness in qualitative research is discussed in terms of four areas: dependability, credibility, confirmability, and transferability (Krefting, 1991). The credibility is reinforced by the research design, by managing internal threats that compromise the process, and by minimizing the effects of confounding variables (Krefting, 1991).

Sufficient information about the research procedure and the research instruments support the dependability of this study. Dependability was also supported by carefully documenting the process for data collection and data analysis to provide transparency about this process to the reader. As well, care was taken to ensure sufficient time was allotted to ensure all eligible participants were provided with the opportunity to participate. Finally, for participant selection I followed the established selection criteria and the order in which prospective participants expressed interest, and this step was done solely by me. The dependability of the selection assisted with trustworthiness.

Credibility in qualitative research is derived from the rich, thick description that the researcher can provide, but must also accurately account for the researcher's presence in the research, the nature of the interaction between researcher and participants, and the interpretation of the perceptions (Merriam, 1998). Based on my daily organizational work in a leadership role and studies as a doctoral student in a leadership specialization, I brought assumptions and an awareness of coherence in strategic planning that has led me to understand the importance and potential value of this research. However, because I see value in this research, I had to suspend some of my assumptions for a balanced and considered approach to the topic. The trustworthiness of research is supported when the researcher is able to be as neutral as possible, allowing the findings to be a true representation of the participants' experience within the conditions of research (Guba, 1981). Analytic memoing assisted me with being reflective and reflexive, as well as being aware of personal biases I may have been bringing to the research.

Confirmability of this study ensures that the interpretations and findings match the data (Krefting, 2011). I was careful to triangulate the findings, interpretation, analysis, and recommendations between the different sources of data, working in an iterative and cyclical manner that always circled back to the source data. I believe this process has increased the confirmability to support the trustworthiness and truth-value of the research. Ultimately, the trustworthiness and truth-value will be

evident if accurate descriptions and interpretation of human experience allow the reader to understand and recognize coherence (Krefting, 1991).

My goal for this research was to provide some applicability to readers. I realize this approach to research does not support transferability, but I hope it may support readers in understanding to which alternative contexts the research may relate. Lincoln and Guba (1985) indicated that the truth-value is evident when the researcher establishes confidence in the truth of the findings. Ideally, this research has provided sufficient data to allow readers to compare findings to their own contexts. When readers can compare results to their contexts, the research is applicable (Lincoln & Guba, 1985).

Limitations and Delimitations

The limitations in a study are the external conditions that impact the study which the researcher does not control (Creswell, 2012). I had anticipated many limitations to this study related to potential changes to the jurisdiction's strategic plan during the duration of the study, the limited time for participants to participate in the study, and the participants' ability to identify with and speak to the phenomenon based on their work context; fortunately, none of these came to fruition. Although I cannot verify this as a limitation, I must note that participants were likely sensitive and selective when talking about their work and the organization. Coherence and incoherence are topics that participants might be careful in referring to because they could be viewed as judgments on the organization. Finally, the methodology, case study, may be viewed as a limitation because it is largely based on the recollection of participants' knowledge of events that occurred in the past. The participant may not represent the event as accurately due to the passing of time. To mitigate against this possibility, I set a month-long time frame between the interviews, which allowed for only a short period of time for the participants to observe the phenomenon firsthand.

Delimitations are the conditions or parameters that the researcher uses to limit the scope of the study (Creswell, 2012). I designed this study with awareness of the following delimitations. First, it included only one school jurisdiction. The participants in the research sample were representative of four departments, not all the departments in the school jurisdiction. I selected senior leaders in the roles of deputy chief superintendent, superintendent, or director as participants, but I did not include the governance level in the school jurisdiction of school board trustee, nor did I include the next level of leadership below the senior level, which would be principals and managers. The nature of change is also a delimitation in this study. I did not design this study to determine if the changes identified in the implementation of the strategic plan were considered first- or second-order changes (Levy, 1986).

Summary

This chapter described the research methodology, rationale, design, and specific methods that shaped this research study. The significance of developing a deep and rich understanding of coherence during the implementation of the strategic plan in an urban school jurisdiction and how it relates to leader decision-making further informs the concept of coherence in the implementation of a strategic plan. I believe the description of the case study research method provides insight into how coherence can be viewed or described, specifically by looking beyond the component parts of the organization to provide a holistic view of coherence as it is lived in the implementation of a strategic plan in an urban jurisdiction.

Chapter 4: Findings

This chapter includes the presentation of the findings, which emerged from the coding, interpretation, and analysis of the data. Based on the analysis of the data, three findings emerged: (a) coherence was defined as a clear strategic priority supported by shared employee understanding and a consistent leadership approach to facilitate strategic plan enactment in the organizational structure; (b) coherence is created through enactment of the strategic plan, and (c) there was little consistency in the implementation and enactment of the strategic plan. The first finding relates most closely to the first research question: How do school jurisdictions' senior administrative decision-makers define coherence? The second and third findings relate most closely to the second research question: How are those leaders involved, directly and indirectly, in achieving coherency during the implementation of the strategic plan?

In this chapter, the participants are quoted verbatim to preserve their voices as much as possible. They are referred to as Participant 1 or P1, Participant 2 or P2, and so forth. I chose to use participant numbers over pseudonyms so as not to indicate gender. Had gender been identifiable in this study, it may have compromised the participants' anonymity. Because the findings are interconnected, some quotes have been used more than once. I did not want the findings to read repetitively, although some repetition was helpful to highlight the interconnection.

Finding 1: Coherence Was Defined as a Clear Strategic Priority

First, findings show that coherence was defined as a clear strategic priority supported by a shared understanding and a common leadership approach to facilitate its development in the organizational structure. Four interrelated components comprise the participants' definition of coherence: a concerted focus on strategic priorities, a shared understanding of the strategic priorities, a leadership approach to

support the development of coherence, and a supportive organizational structure. This conception demonstrates that all the components are connected to the strategic priority.

These components emerged when the participants described coherence and provided examples to demonstrate that coherence was occurring in the organization. Figure 2, Definition of Coherence, represents how the participants in this study described coherence and demonstrates the emphasis that each participant gave to the components of coherence. Shared understanding, leadership approach, and organizational structure are positioned below strategic priority because they support its implementation. These four components also emerged prominently when the participants spoke about the barriers to attaining coherence. I elaborate on each of the four components, and their interrelationships, to illuminate how they support coherence in the implementation of the strategic plan.

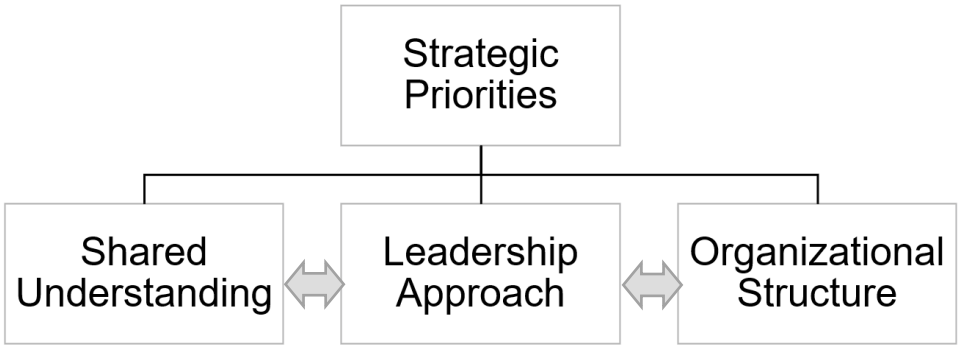

Figure 2. Definition of Coherence: The four components of coherence.

Component 1: A concerted focus on strategic priorities. The first component in the definition of coherence is a clear and concerted focus on the strategic priorities of the school jurisdiction. Participants shared three aspects in a strategic plan that assist with the strategic priority and contribute to coherence. The three aspects are the design of the strategic plan, the sustainability of the plan, and a compelling priority, such as student success. The details on how participants described each of these aspects follow.

Design of the strategic plan. All participants referred to how the design of the strategic plan can support the creation of coherence. The design was described as "having a small number of outcomes that we are seeking here in relation to student learning. Like, a small number. [This is] very intentional" (P1); as "one outcome, student success, that guides all work" (P5); and as "our one district strategy and one outcome" (P6). The participants indicated that the plan was easy to understand because it had a specific focus, and it was reasonable in size.

The participants further identified benefits of a narrow and skinny strategic plan, suggesting that the design of the plan makes it accessible to people because of the clarity it provides to staff:

> Everything was anchored in that [design]; that is what made it so easy. . . . And the idea of a skinny plan invites everyone to it. . . . When you have that clear focus on [the strategic priority], . . . all of the other pieces just fell together so beautifully. (P2)

The final suggestion about the design of the strategic plan was for it to facilitate an "absolute laser-focus from what's in this three-year plan" (P2), and the "laser focus is what everyone is attending to at this point" (P5). The above examples demonstrate an in-depth description of how the strategic plan has created a clear focus in the organization.

The benefits of a concise plan were contrasted with more extensive and more elaborate plans. Participant 2 described when a plan "is so structurally focused, you get into a checklist approach." This participant suggested that implementing a plan with a lot of detailed strategies and actions may cause a step-by-step action approach, as if to check items off a checklist. Participant 2 indicated that the challenge with this type of plan was "these complex things can't be attached to a checklist," and therefore, this type of planning has limitations. This comment about planning suggests that a strategic plan is limited if it is too specific. By extension, it also suggests that a narrow and skinny plan allows for some flexibility, which is beneficial for complex work. A strategic plan must be designed with some

flexibility because plans are intended for a future state based on what is currently known. However, many elements in the work context cannot be planned for or anticipated. Predicting the conditions for the implementation of a strategic plan is often imperfect and, therefore, will require adjustments. Participant 2 hinted that a narrow and skinny plan allows for flexibility.

Many benefits of a narrow and skinny strategic plan were espoused, suggesting that this type of design has a small number of outcomes, supports a concerted focus, allows for greater clarity in understanding the intention of the plan, supports the implementation of the plan into work plans, and provides for flexibility.

The strategic plan is sustainable. The participants indicated that the design of the strategic plan and the focus of the strategic plan had been a consistent focus for many years. All participants spoke about the importance of the consistent focus over many years. Four participants referenced how a consistent focus on the strategic plan has created more coherency in the organization. Participant 3 explained:

> This is a year four, year five that we've actually had essentially the same strategic plan with evolutionary components built into it. So, it is continually evolving, but it's not dramatically different, and it has allowed that sustained focus has allowed for the better connection of the work. . . . So I would say that connection and coherence, the connection to people and their education plan and the coherence that exists across people in the organization, is greater now than it ever has been.

As this participant suggested, a consistent focus over four years creates opportunities for a deep understanding of the strategic plan because the focus has remained the same. If a strategic plan changes each year, there is likely an adjustment period to understand and implement the plan. Participant 1 explained the consistent long-term focus: "Well, I would say that there has been a greater level of

consistency and the urgency of higher levels of coherence in the last, say, six years." The above example demonstrates how the design of a strategic plan that supports a consistent and sustained focus increases coherence in the organization.

A compelling priority, such as a focus on student success. All participants stated that the priority for the school district—a focus on having all students succeed—was compelling. The analysis of the data gathered in the study demonstrated a clear focus on student success, evident in the mission, vision, foundational statements, strategic plan, and department work plans. Participant 1 described the mission statement as "every student, every day, no exceptions." The strategic plan outcome was "student success, that guides all work" (P5) and created a focus solely on "student success" (P6). This perspective was consistent among the participants when they spoke about their work. Student success was the strongest area of consistency in the data from the research participants. In this research, four out of six participants had core work that connected directly to student success, and two of the participants had an indirect connection to student success as their core work. All participants stated that the focus on student success was essential to the organization, and this focus has been critical to improving the school jurisdiction. It was evident that having a strategic priority that was relevant to one's core work, meaning student success in a school jurisdiction, would make it easier for the strategic priority to be compelling.

The aspects identified in this study that were critical for the focus on the strategic priority to create coherence were the design and the sustainability of the strategic plan, as well as having a compelling strategic priority. The design of the plan can assist with making it more accessible and easier for employees to understand. As well, a plan that has a consistent focus for many years helps make the plan sustainable. A compelling strategic priority, such as student success in this case, demonstrated a concise and centred focus. A concerted focus on priorities supported the development of the next

component in the definition of coherence, a shared understanding of the strategic priority across the organization.

Component 2: A shared understanding of the strategic priorities. The shared understanding component of establishing coherence is foundational because it is critical that employees become aware of and fully understand the strategic priorities. Establishing a sufficient level of shared understanding about the strategic priority involves a comprehensive understanding of the strategic priority across the organization, a collective understanding among employees and an understanding of the strategic priority that becomes personal to the employee. I explain these three categories further.

A comprehensive shared understanding of the strategic priority across the organization. All six participants mentioned a need for clear expectations to adopt a shared understanding of the strategic priority across the organization. The participants gave examples of what a shared understanding of the strategic priority would look like in the organization. Their statements indicate a focus on the strategic priority and an expectation that the strategic priority will inform and guide employees' work in the organization. Participants made statements such as in "the big overarching goals, learning is our central purpose" (P5) and "these statements guide us in creating conditions for each student to thrive and are used as a filter for how we do everything" (P6). These quotes suggest that expectations are explicit in the organization that senior leaders, and indeed all employees, have an awareness and understanding of the strategic plan. Establishing a clear and comprehensive understanding of the strategic plan was stated as contributing to coherence.

The participants consistently stated that the strategic plan indicated clearly that they were expected to develop a shared understanding of it through their work. Participants 2, 3, 5, and 6 also provided artifacts, especially department work plans, to further elaborate on the strategic plan. As referred to in Chapter 3, the artifacts provided a deeper understanding of how the strategic focus of the

strategic plan translates into the intentions of day-to-day work. The analysis of the foundational statements, the strategic plan, and the department work plans demonstrated strong connectivity and continuity in the planning documents. The artifacts demonstrated that a high percentage of strategies focused directly on the strategic priority, and the remainder of the strategies, for the most part, had an indirect intent to focus on the strategic priority.

As Participant 1 indicated, the strategic plan is "living, breathing proof" of this commitment to students' success "because they've set their stake in the sand around academic success." A crucial part of establishing a shared understanding across the organization occurs when the strategic plan is consistent with the foundational and strategic documents, and this in turn enables better implementation of the plan in the organization.

The next aspect of shared understanding emphasized that every employee in the organization should know and be aware of the strategic plan. Participants also indicated an expectation that everyone in the organization understands and is aware of the focus on the strategic priority. Participant 2 stated, "It will be very difficult within our district to find anyone who didn't know that student success is our priority, [and] . . . that means everyone." It was also stated, "I think regardless of where people are in the organization, conversations they have with their colleagues, with their supervisors at every level, is a very similar conversation about our purpose" (P2). Participant 2's statement indicates that employees are talking about the strategic priority outside of times when they are not looking directly at the strategic plan. It also indicates that the content and the meaning of this discussion are similar in all parts of the organization. Participant 2's comments are significant because a shared understanding that is discussed regularly in an organization would likely improve coherence. Further to this idea, when "leaders are engaged, with clear expectations, they're going to permeate the rest of the system" (P5). These examples

suggest that when employees are aware of the strategic priority, it becomes part of the dialogue, which will create a broader understanding of the strategic priority across the organization.

Another part of creating a shared understanding was to filter or frame all the work in the organization through the lens of the strategic priority. Two prevailing views emerged. First, allow for collaboration between employees who work directly with the strategic priority and come at the work from this perspective with employees who do work that is indirect or not connected to the strategic priority. Second, working in collaboration with employees to allow for a diversity of views and perspectives from across the organization will bring higher value to the work and establish a deeper shared understanding.

Many participants indicated it was essential to find ways to include strategic priority as part of the conversation and daily work. Two participants made similar statements: “So it’s around keeping students in the conversation” (P5) and “so everything we’re about, that we do, that we lean into, is read through that purpose” (P6). Both of these examples emphasize the need to make sure the strategic priority, a focus on student success, is always considered. The examples suggest that every task in the organization could potentially connect to the strategic priority and should be considered from this perspective. Participant 1 described that when there are situations which could potentially challenge the focus on the strategic priority, “there’s a space and an opportunity for how all of those parts come together in more of a cohesiveness, as opposed to a polarization.”

Another example of a shared understanding of the strategic priority was that it should consistently inform decisions across the organization. Participants 2 and 3 indicated that all constituents within the educational organization should be able to see that their work contributes to student success. Another participant (P6) indicated that it was clear that the work one does needs to connect to student learning and the classroom. Participant 1 said,

> One of my big components from [Harvard professor Richard] Elmore is that I really like his concept of the through-line, and I really like his concept that if you cannot see how what you're doing basically plays out in the classroom, then you're overhead.

Similarly, Participant 5 offered some questions to remind employees the focus on the priority: "What does that mean in your workplace? Can you see a through-line to students? Can you see the overarching objective for the [jurisdiction]? It serves the common good." The examples provided suggest that all employees should be able to choose and connect their work to the strategic priority.

The shared understanding must also connect with areas in the organization that focus on work not relating directly to the strategic priority. Participants referenced how the focus on student learning is considered and informs decisions in departments that do not work directly with students. In situations where the core work might be distanced from student learning or when people have roles that might not always enable them to see the connection to student learning, it is still expected that the work is considerate of the goal of student success. There is a willingness to work collaboratively and a willingness to work with a shared understanding viewed from many perspectives. Participant 5 suggested, "We should have a system reflected in a variety of ways in the three-year education plan." Participant 1 shared,

> I think that what these folks have brought with them is a mindset of listening to where the educators are saying there are gaps and looking for ways in which the resources can then support those gaps or areas in need.

Beyond the expectation that all employees clearly understand the strategic plan, there was a broader expectation of a collective understanding. The importance of having a collective awareness and a collective commitment was explained by Participant 3:

> To me, it is of the highest level of importance. If our commitment is to moving a system forward, not just having a system function effectively within the current parameters, but actually moving it beyond the present, going beyond the status quo without coherence, you become solely dependent upon individuals in leadership positions, and individual capacity is always less than what collective capacity is.

Participants 2 and 3 described ways to develop a stronger collective understanding. Participant 2 stated, "You get coherence when you facilitate, I think, the network of support people need to achieve the outcome." This example implies that people are working with the organizational structure to facilitate shared understanding. Working with the understanding of the organizational structure to support avenues for information flow, communication, and conversation in the organization was mentioned as the next prominent area to build shared understanding. Participant 3 expressed,

> So it's really connecting, it is connecting and finding those points of intersection, and it's working collaboratively with my colleagues. . . . I think each of us takes things forward in a way that's very similar, but also that reflects uniquely how we approach things.

The above example suggests that exploiting the points of connecting and understanding different perspectives can enhance the shared understanding. Participant 5 also stated, "Our greatest strength is that people come to this understanding from a different perspective" based on where they work in the organization. These examples imply that establishing shared understanding is enhanced when a variety of views across the organization work in connected ways.

One final way to view shared understanding is through a more in-depth or even personal level. Participant 2 mentioned how a deeper level of understanding occurs when "people actually see the plan doesn't reside outside of them; the plan resides within." This example indicates that a shared understanding potentially means something personal to employees and suggests how employees can

have ownership. Ownership would mean there is a level of caring related to the strategic plan. Participant 6 stated, “I got a real sense of there being a deep understanding, a personal aspect where each person understands this collective understanding on personal accountability, not accountability but a connection beyond accountability.” Examples of an employee having personal connections were also exemplified by Participant 2, who indicated “the moral, ethical work of public education is so ingrained in who we are.” The advantages of having a deeper connection to the plan might be positive because it would likely mean a significant commitment to the work by employees.

Participant 3 noted how an employee’s understanding of the commitment could be a barrier. This participant gave the example of a situation where “personal agendas, beliefs, and values can interfere with the individual operating with a joint view of organizational intention,” meaning the personal intention does not align with the strategic priority. Employees can interpret the strategic priority in a variety of ways, and therefore, it is critical that personal beliefs support and align with the intention of the strategic priority.

This component demonstrates that a comprehensive awareness and understanding of the strategic priority throughout the organization contributes to coherence. The strategic plan and foundational documents of the organization are critical to informing the shared understanding. A shared understanding is enhanced when it becomes a collective understanding, and when employees establish a personal commitment. Working in a manner that allows for dialogue, fostering awareness across the organization, and collaborating will create opportunities for a collective shared understanding to permeate the organization.

Component 3: Leadership approach. The leadership approach component in the definition of coherence referred to how leaders support coherence. The examples for this theme related to leaders understanding their potential within the context of the organization to create coherence. The explanation

of leadership approach for the definition of coherence is general and broad. There was agreement that leaders play a critical role to facilitate coherence with the consideration of the other three components in the definition of coherence. For the definition of coherence, the participants indicated the leadership approach as understanding the strategic direction and navigating the organizational structure to create intentions in a way that maintains and creates coherence. Leadership approach is discussed briefly in this section and is covered thoroughly in Findings 2 and 3.

Participants shared specific, vital components to describe the leadership approach for the definition of coherence. These included setting clear expectations that employees will work in a way that fosters coherence, working in more transparent and collaborative ways, always being open to opportunities for improvement, holding employees accountable for working this way, and striving to overcome barriers that prevent working in this way.

The participants described that there must be clear expectations for leaders to work through a leadership approach that fosters coherence. Participant 1 indicated that one of the challenges of the past was "we never really asked for everyone to be on the same page and held them accountable to this [expectation]." This example illustrates that if this priority is to be actualized, it must be stated explicitly as an expectation of the leaders. If the expectation is vague, or if the participation is voluntary, it leaves room for varied interpretations which may not create the desired results.

A participant gave this insightful perspective about being able to work in isolation: "I think what we did was better than what we had done, but not as good as what we could have done, and it was more because of the decisions that were made in isolation, from my perspective" (P3). This statement refers to how vague or unstated expectations can result in a leadership approach that allows leadership to work in isolation from the rest of the organization.

The leadership approach for creating coherence was defined as working in collaboration, utilizing or creating connections and networks, and allowing work to be transparent. Participant 4 explained that once the expectations are clear, there is also an agreement that "working in this way, need to work according to the outcome, need to adjust, leaders need to commit to working in the way of coherence." This explanation builds on Participant 1's comment about holding people accountable for this expectation, indicating that if leaders are expected to commit and follow through with the leadership approach, it must be stated explicitly and monitored for development and progress. Participant 4 also indicated that working this way may be different from how things have been done in the past, and "not all employees want to work this way. It means you are being more open and vulnerable."

An example of people working oppositely, in isolation, was provided by Participant 3: "Well, it's actually hard if everybody is working in a distributed way and there are no points of connection between decision-makers, or very few points of connection between decision-makers and an individual." This participant was suggesting that when there is no expectation for people to connect and work consistently on the same strategic priority with the same accountability, it is harder to achieve coherence because they will not know if the work is similar, different, or aligned.

Participant 3 clearly stated leaders must have common expectations for people to work together and achieve the same ends, but stressed that the work as a leader is to determine "how do you get all of the horsepower pulling in the same direction." This explanation emphasizes the importance of the leader monitoring and responding to progress in the context of the work environment. Participant 5 stated that to attain coherence, "it's not just what's written down in your work plan. It's about enacting. It's absolutely the enacting of it." There was a clear indication that leaders understood their potential within the context of the organization to create coherence through the leadership approach. The next section

refers to how the leadership approach needs to be nimble and adaptive, and there must be a willingness on the part of the leaders to be open to considering changes.

Other criteria in the leadership approach involved being aware of progress, looking for opportunities, and being open to adjusting the leadership approach. Working in a way that builds coherence also means that leaders need to be aware of progress and a display a willingness to be responsive to the context they encounter. Participant 6 described, "We need to evolve our practices. We need to constantly strengthen them." The comments from Participant 6 suggest a need to be flexible, open to examining the effectiveness of one's work, and willing to change one's leadership approach. Participant 2 gave the example of how the opportunity for refinement and change emerged from the day-to-day work. "[We asked,] 'What expertise do we need to learn to advance that work of the three-year plan in our system?' We needed [employees] who come at this with deep expertise." Participant 2's example indicated a shift from asking a typical question (Who can do the work?) to asking a better question: What employee skills and attributes enable them to be successful in creating coherence?

Similar to the above statement about the need to be aware and responsive, Participant 2 explained that to attain coherence, it is essential to be aware in one's day-to-day work and believe that "every change is an opportunity." The key element expressed was to look for opportunity. A reduced budget was shared as a reason to reflect on and reconsider what was needed to create coherence. Participant 2 explained how facing a reduced budget was a challenge, but also, "I think it was a huge opportunity." This perspective reinforces how working to find coherence and finding a way to reflect on the work can lead to a stronger position of determining how to make that work coherent.

The next two criteria in the leadership approach were to ensure employees are willing to work in this way and have the ability to work in this way. As previously stated, when employees work to create coherence, it means their work is more transparent and more public. Participant 4 suggested that "not all

employees want to work this way." This example articulates that working in collaboration with colleagues, with little privacy, may not be a manner in which some employees feel comfortable or are capable of doing. Earlier in this finding, an organizational structure was referred to that compartmentalized work into departments or assigned work to individuals. This type of design may not have required employees to collaborate, share the results of their work, or even have previously supported individual accountability. It also suggests some people might not find collaboration easy, and therefore hints there might be resistance to this way of working. Participant 4's comment also identifies that some organizations may operate with a well-defined organizational hierarchy that allows each department to focus on the strategic priority but also work independently. An approach like this may assume that a well-designed implementation of the strategic plan may sufficiently meet the organizational needs. Unlike the statement made by Participant 4, there may not be a need for employees to be aware of what other departments are focusing on as strategic priorities. This example may be reflective of an organization with less complexity and may be an example where implementation and not enactment of the strategic priorities will be sufficient.

The final component in the leadership approach refers to the challenges that employees face, even though they are willing to work in the way of collaboration and increased transparency. Participant 3 described how, even with clear and explicit expectations, barriers to the leadership approach might emerge:

> You know, I think the biggest risk is letting that day-to-day urgent pressing matters that arise that may or may not be related to the priorities—and most often are not related to the strategic priorities—consume so much time that we don't actually have the ability to direct time and attention [to the priorities].

This example suggests that the work context contains specific demands for time and attention, which might compete with the time needed to focus on strategic priorities. The challenge for leaders is to know how and where their point of influence is the greatest, in order to continue the work of building coherence through the leadership approach. Principals have consistently indicated that increasing demands on their time for work that does not align with the strategic priority pose a challenge to coherence.

This theme demonstrates that creating and maintaining coherence requires a responsive and concerted leadership approach to ensure progress is being made in the organizational context. The leadership approach involves working with a deep and shared understanding of the strategic direction to allow it to successfully be implemented within the organizational structure while at the same time maintaining and creating coherence.

Component 4: Structure of the organization. The participants described the structure of the organization as supporting the development of coherence and as a potential barrier to creating coherence. Three approaches were described for working with the organizational structure: understanding the structure, managing the structure, and changing the structure to support the implementation of the strategic work.

Understanding the structure. When participants referred to understanding the structure of the organization, they mainly referred to understanding how the organizational system operates. The examples of understanding included how the organizational structure divides the organization into departments to carry out specific responsibilities, how the organization of the system separates and connects the greater system, how the organizational structure relates to the flow of information, and how the system was designed to operate. All participants referred to the importance of understanding the organizational structure as it relates to the work in the strategic plan.

Four out of six participants shared the importance of understanding the organizational structure for its current value to ensure the structure serves the purpose of the strategic plan. Two participants gave similar examples as they described their understanding of the structure of the organization. Participant 3 indicated the organizational structure "is designed in a linear way, which controls the flow of information or actions into departments because this represents the natural flow of information and work." This individual suggested it is similar to a hierarchical design that assigns accountabilities from the top through departments. This type of organization is efficient at conveying information from the board or most senior employee, down to departments, and down to employees in the departments. Participant 5 indicated that the "minimal expectation for the structure of the organization is to enable the alignment of work and initiatives in the system." As well, the participant explained that the "current organizational design of the system created a structure that supports vertical alignment or vertical coherence. . . . I think we have vertical coherence" (P5). Participant 5 described that the implementation of the strategic plan "works well, and we attain coherence when our work aligns with the current structure of the organization" (P5). This participant was indicating that the only way coherence currently exists is when it follows the organizational structure, is primarily in one department, or follows on paths where networks are currently established.

The above examples represent how the participants described understanding the structure of the organization concerning the strategic work that will be required. Comments suggest that when the work aligns with the way the organization functions, the strategic plan will create coherence.

Managing the structure. Beyond understanding the need for alignment of the strategic vision with the organizational structure, there is a need to work with the organizational structure to maximize effectiveness. Participant 3 added that it means

> looking for the points of intersection, . . . making sure they are clear and apparent between the system and its interests, and [identifying] what it is that people working in our schools see as crucial. . . . It's looking for those intersections.

The idea of understanding the connections was also expressed by Participant 4: "Work is always so interconnected that I worry that we still haven't gotten to the person, out over here [participant pointed], responsible for this that cascades up, knowing and understanding that they have a dependency way over here." This comment displays the need for communication channels or connections to be in place to convey information to facilitate understanding. This idea is broadened in Finding 2, where a participant refers not just too gaining information about what is happening in the organization, but also to being able to have access to crucial meetings, events, and other critical information.

Participant 5 noted the benefit of the linear structure, which "allowed for a way to understand who did what in the organization, to be moving consistently together and to ensure the biggest priorities in the system are attended to." However, when the work is complex, "It's the [department] units, and you need that horizontal alignment and coherence around that. So, I think we do very well at the vertical. It's the horizontal that I think, larger [complex tasks] where we struggle" (P5). The example indicates that some strategies are easier to implement when they align with the organizational structure, and therefore, coherence is achieved relatively quickly when the strategies align with the organizational structure. However, when a strategy does not align with the organizational structure, and it requires employees to work with other departments, across the organization in a horizontal manner, it is more difficult and challenging to attain coherence. The participant also suggested that attempting different ways of working at the department level is more successful because this is where the work needs to reside.

Participant 1 spoke about how it was critical to understand and create a way to work within the structure of the organization to create coherence. This participant contended that people in the organization may lack the understanding of how to work with the organizational structure to support the creation of coherence: “Not everybody knows and has set up the mechanisms to the level of detail that I think are required. . . . [So] we’ve put into play sort of several mechanisms to try to build capacity in our system around [our goals]” (P1). This example suggests individuals do not need to figure out where support is necessary; rather, leaders can work collectively with the organizational structure to create more effective implementation and more coherence.

Changing the structure. Five participants talked mainly about understanding and managing the structure of the organization to create coherence, but very few spoke about changing the structure of the organization. One participant clearly stated that there is a time when efforts need to be made to change the structure of the organization to attain coherence. Participant 2 noted,

> Structures can’t drive the work, and whenever the structures drive the work, we get into the [situation where the structures are reinforced]. . . . I mean, in general, when the structure drives the work, barriers get built. When the work drives what we need to do and informs the structure, work gets done.

This comment suggests that when the structure of the organization conflicts or does not allow for working in a way that is counter to the organizational structure, the structure will dominate unless efforts are made to change the organizational structure. Participant 3 also added a similar statement, “If there are barriers, how can we facilitate or remove those [barriers]? This is a good opportunity to realign around the work again.”

Participant 3 also noted how the structure of the organization could support or conflict with the way people work in the organization. This participant said, “I think we do have some organizational

practices that still support things happening in isolation and not in a way that sees them connected to the big picture work" (P3). Two participants gave specific examples of the types of work that are more complex and require working across boundaries. Participant 2 referred to times when "work comes first rather than who you report to." Further, the participant said, "There should be no artificial barriers, there should be no imposed barriers, and if you need a conversation . . . it shouldn't matter, in fact, if you're out of the building" (P2). If employees need to talk to someone to ensure the work goes forward, organizational structures such as to whom one reports, or if someone else jointly owns the work, should not be barriers. This outlook suggests that there is a need to work beyond the barriers, perceived or real, if the work is going to create coherence. Working beyond the barriers suggests that the work transcends them, which, eventually, could lead to a more fluid way of working beyond the barriers, or the organizational structure is adapted to accommodate working beyond the barriers.

The example Participant 5 shared is similar; it referred to work that does not align with the vertical organizational structure. This participant said, "There is a disconnect because the departments don't have alignment across all of the departments" (P5). This participant identified that "it's not the executive level [where the solution is]. . . . It is done at the director level, at the manager level" (P5). The mid-level leader was the role that could transcend boundaries. This perspective suggests that the changes to enable working beyond boundaries are patterns that may challenge the hierarchical structure because the reporting relationship remains unchanged. Also, this participant asserted that when the structure of the organization inhibits the purpose of the work, it could be a barrier to coherence. Therefore, one must manage, control, and change the structure if needed.

The data analysis revealed that understanding, managing, and potentially changing the organizational structure is essential to the achievement of coherence in the implementation of the strategic plan for an organization. Participants also identified how the structure of the organization

influences how employees in departments can or are prevented from working together, which can be a barrier to coherence. An organizational structure that allows employees flexibility in how they work provides more opportunities to create coherence. Conversely, an organizational structure that deters or prevents employees from working between departments becomes a barrier to coherence.

Zone of coherence. Finding 1 described how the participants in this research defined coherence. This study found that four necessary components were prominent in the definition of coherence: strategic priority, shared understanding, leadership approach, and the structure of the organization. The definition of coherence did not reveal a consistent way the common components worked together, but it did demonstrate an interdependent relationship between them. The Definition of Coherence, Figure 2, mentioned at the beginning of this finding, illustrated how the strategic priority was positioned above the other three components.

Throughout the analysis of this finding, it became apparent that the definition of coherence was not static but included an interdependent relationship with dynamic interaction between the four components. Figure 2 does not represent the differences between how participants emphasized one component over another, nor does it show the preferences that a participant might have for specific components.

By way of example, I compare coherence and making a cake. Making a recipe for a cake that has four ingredients, but no quantities listed for the ingredients, creates a situation where the variations in making the cake are limitless. Similarly, creating coherence has four components, but no limitations or restrictions on how the components are used, and interactions can be limitless. Based on the information that the participants presented, it is possible to more accurately represent how the participants defined coherence by including the emphasis they put on each of the four components. The Zone of Coherence, Figure 3, represents the preferences that participants emphasized for the explanation of coherence.

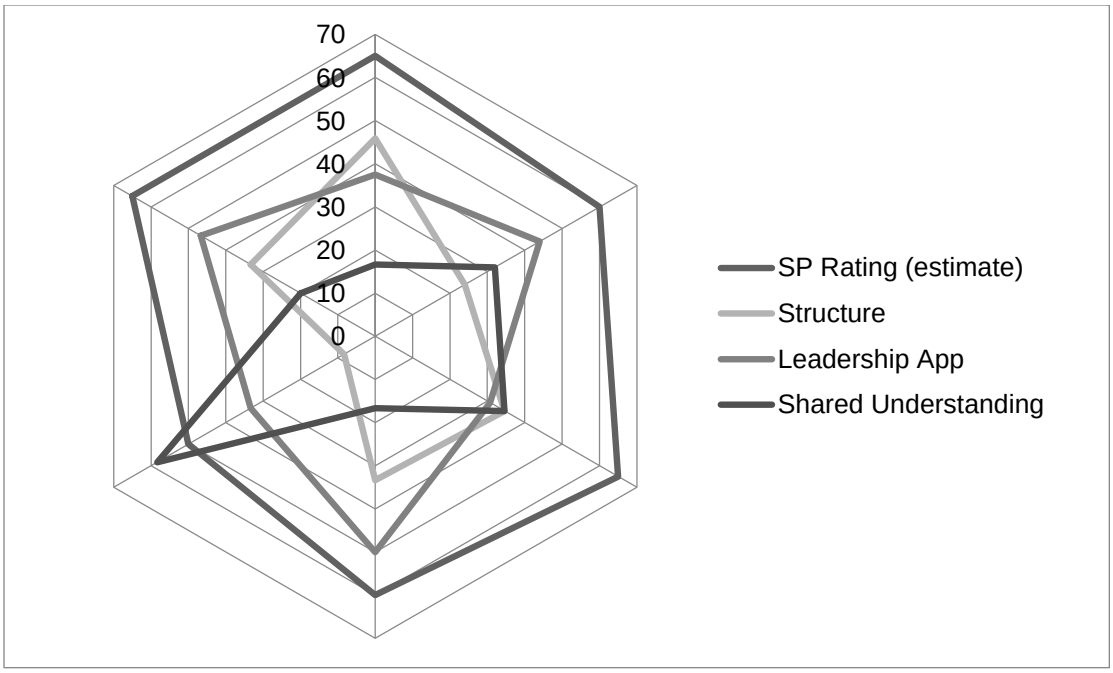

Figure 3. Zone of Coherence: Data analyzed conceptually and coded into categories.

Participants agreed that the most important component was the strategic priority. They consistently described it as the fundamental component guiding the other three. Comparing this to the example of the cake recipe, the quantity of this ingredient, the strategic priority, was a consistently high quantity ingredient. For the remaining three components, the emphasis was quite varied. Most participants demonstrated a preference to one them more often than they referred to the other two. For example, leadership approach was a predominant component for Participants 2, 4, and 6; the structure of the organization was a predominant component for Participant 1; and Participant 3 did not emphasize a predominant component. These various ways to understand how the components can combine create a description of the definition of coherence. The example allows for a broader understanding of the variations in creating coherence based on the three components of coherence: shared understanding, leadership approach, and the structure of the organization. Based on the above information, it is relevant to consider that coherence occurs in a broad variety of ways, which I describe as a zone of coherence. The zone of coherence represents how an organization moves to coherency or in and out of coherency

through the interdependent relationship between the components of coherence developed in the organization around the strategic priority.

The Definition of Coherence (Figure 2) and the Zone of Coherence (Figure 3) both demonstrate that strategic priority, shared understanding, leadership approach, and the structure of the organization are fundamental components to the creation of coherence during the implementation of the strategic plan. There was agreement among the Participants that the above four components are critical to the creation of coherence. There was also agreement that the strategic priority is a fundamental component to inform the other components in the definition of coherence. The next findings move beyond how coherence is defined during the implementation of the strategic plan to focus on how coherence is created during the implementation of the strategic plan.

Finding 2: Coherence Is Created Through Enactment of the Strategic Plan

The second finding, that coherence is created through the enactment of the strategic plan, reveals that coherence is constructed while it is lived in the organization. This finding is based on the participant descriptions of the creation of coherence in the organization during the implementation of the strategic plan. The participants used metaphor and metaphorical statements to describe their leadership work to create coherence in a dynamic and interconnected system. This finding broadens the definition of coherence to position coherence as something that is continually worked on by leaders operating within the organizational context. This finding suggests that coherence is not just putting into action a strategic plan that has been laid out in detail, but by leaders carefully implementing the strategic plan around the desired outcome, it will create coherence. The process for creating coherence through the enactment involves understanding the interaction of employees within the structure of the organization around a strategic vision. This research asserts that planning for coherence needs to move beyond what is planned for, but requires an active and ongoing process during the implementation of the strategic plan.

Consideration of the metaphors and metaphorical statements was another way to enhance the understanding of how participants viewed coherence. Details on the participants' use of metaphor were provided in Chapter 3. Analysis of metaphors is beneficial in qualitative research because they "serve as a powerful strategy to portray complex realities" (Miles & Huberman, 1994, p. 89), illuminate aspects of a phenomenon not previously noticed (Lakoff & Johnson, 1980), and add depth of meaning to the understanding (Kangas, Warren, & Byrne, 1998).

Many of the metaphors participants used had some reference, description, or relationship to the structure of the organization. Lakoff and Johnson (1980) indicated that the majority of metaphors are structural. Participants referred to understanding, controlling, or managing, as well as changing the structure of the organization to allow for the creation of coherence. The structural metaphors shared by the participants demonstrated two types of language, mechanical and biological, creating two types of structural metaphors, mechanical and biological. The mechanical language included words such as *connected*, *networked*, *nodes*, *system*, *boundaries*, and *mechanism*. The natural language of a biological metaphor included words that were representative of biological ideas such as *nested*, *balance*, *organic*, and *tree*. In addition to mechanical and biological metaphors, participants also spoke of coherence as a way of being.

Mechanical metaphors. Mechanical metaphors consider how understanding the design of the organizational structure assists with the creation of coherence. Understanding how the organization is linked, divided, or networked can be utilized to enhance the development of coherence. All participants referred to the terms *network* and a *networked system*. Mechanical metaphors describe how the structure of the organization creates coherence. The mechanical metaphors referred to physical structures such as a stairwell, a network, or a laser.

Participant 2 used the metaphor of a stairwell to describe how coherence could be enabled and further developed by working within the structure of the organization. “I just simply said . . . use this [showing a slide of the stairwell]. . . . There should be no artificial barriers, there should be no imposed barriers, and if you need a conversation, it shouldn’t matter which floor of the building” (P2) you work on or to whom you report. This example also indicates how the organizational structure needs to support the work and cannot serve as a barrier. A stairwell allows employees to move beyond the boundaries of departments and role definitions to do the work that is required. Participant 2 added, “The structures can’t drive the work, and whenever the structures drive the work, we get into the pattern that reinforces the structure.” The stairwell was used as a powerful metaphor to demonstrate why it is necessary to manage and potentially challenge barriers that might be inherent in the organizational structure. The example suggests that if an employee could not talk to another employee who is on another floor in a different department, it would potentially prevent both from doing their work to the fullest. The same example would serve to demonstrate how barriers can prevent connecting with others to create coherence through the work.

Another example of a structural metaphor to create coherence referred to a machine component, a mechanism, as part of the interaction between the organizational structure and the leaders. Participant 1 suggested that an understanding of the mechanism is necessary to function within the organizational structure: “Not everybody knows or has set up the mechanisms to the level of detail that I think are required.” A mechanism was referenced as a tool that leaders use to manage the effectiveness of their work within the organizational structure. The above example suggests that insufficient knowledge of working with the mechanism within the structure of the organization is a challenge to coherence. Further to this, the mechanism was explained as a critical factor that contributes to the creation of coherence.

Participant 1 referred to another example of mechanisms:

> You put in some mechanisms to try to get yourself into schools just to have the conversation and to have people speak to you about what is it that they are seeing that's contributing to the movement, moving that needle in terms of their area of action.

This example suggests that leaders use mechanisms to manage the work within the system to allow them to be in the schools and learn if the information on the strategic priority is getting to the school level. By utilizing the mechanisms, leaders gain access to the necessary information to determine coherence. This leader described that previously, it had been a challenge for senior leaders to spend sufficient time in schools, but by creating a mechanism and a commitment to the strategic priority, this aim was achievable. Participant 1 indicated:

> In my calendar, I book school visit time and go out to the schools. I say this is really important sacred time and I get very frustrated when there are things that pull me away from that, and I think if I didn't have that level of frustration, then there would be a concern.

The mechanism served as a metaphor for this participant to be able to understand and manage work within the organizational structure in order to create coherence.

A laser metaphor, also an example of a mechanical metaphor, was also used to describe coherence in the organizational structure. Two participants used a laser metaphor in different ways. First, Participant 5 referred to the way the leader created a clear focus: "I need to have that absolute laser-focus from what's in the three-year plan, adapting it in a way that makes sense for frontline staff, but it's absolutely clear." This example demonstrated how employees in the participant's department understand the accountability to the strategic priority. This same sentiment was expressed by Participant 2: "The plan is that laser focus into what everyone is attending to at this point in time." These examples of the laser metaphor support a perspective that the focus on the strategic priority must be clear and precise, like the beam of a laser.

Another example of the laser metaphor referenced how "lasers can go short distances, long distances, but what you should be able to see in a context, . . . you should be able to see coherence in the work, whichever position, whichever level, whichever school, whatever program" (P5). This example suggests that to create coherence in an organization, the strategic priority must be very clear throughout the organization, like that of a laser. The beam of the laser remains consistent and creates a clear point wherever it contacts.

The final example related to how there are limitations to the use of a laser, just as there are limitations to coherence as it develops within the organizational structure. Participant 5 compared the laser focus to a type of coherence: "I need to have vertical coherence. I need to have that absolute laser-focus. . . . I think we have vertical coherence. I don't think that we have horizontal coherence. . . . When I look at the horizontal coherence, . . . it becomes more complex." This example referred to how the laser approach is not as effective in an organizational structure that is not linear. The participant explained that for horizontal coherence, "we might need some structural alterations, in which case, horizontal linkage" (P5). Just as a laser is very effective with tasks that align with the design—short and long distances in straight lines—the laser faces boundaries and limits if it must go around corners or go through walls. Participant 5 suggested that with modification to the organizational structure, such as a "horizontal linkage," it is possible to create horizontal coherence, similar to how a laser can transcend boundaries or go around corners with the necessary modifications to the building.

The mechanical metaphors present a view of coherence within the organizational structure that draws parallels to how mechanical solutions and approaches can enable individuals to understand how a system functions and allow them to consider how they can work with a system to create more efficient functioning.

Biological metaphors. The biological type of structural metaphors utilized organic and natural examples of how to represent coherence in the structure of the organization. The biological metaphors referenced natural objects such as trees, a sleeping baby, and a bird's nest.

One participant said, leaders "must be aware that we operate in a nested system" (P4). They must understand that "coherence grows or is fostered in a nested system that has an interdependence, an element of trust, good open communication, and an awareness of each other's responsibilities in the organization" (P4). Similar to the mechanical metaphor that referred to networks or a laser that connects points, a nested system demonstrates connectivity. The example of communication and awareness in the nested system suggests how elements connect, are visible, and potentially support one another. The relationship with coherence was described as interdependent, meaning if one component moves, the other moves, all dependent on each other, similar to how a nest is constructed by carefully placed twigs, yarn, and other elements to hold it together. Building on the metaphor of the nest reveals more about the structure that might apply to coherence. A nest functions well when it is carefully constructed; it relies on the dependency of other elements, such as the tree in which it is built.

A tree was also used as a biological metaphor. The tree metaphor illustrates how coherence occurs within the organizational structure by identifying the many qualities related to creating it:

> The organization is like a tree, and so what's happening in the core needs to be consistent with what's happening out [there]. We are on the branches; like, we are on the leaves. And sometimes what happens is that, for whatever reason, there isn't that lifeblood that comes up and down and all the way to the end of the branch. (P4)

The tree metaphor explains how consistency is essential between the core or central office and the schools, or between the departments in a school jurisdiction. It also refers to the importance of

information flowing back and forth within the organization. Participant 4 also used the metaphor to explain what happens when individuals face challenges in the system:

> So, the branch does something stupid, and what do we do? We cut the branch off, right? We don't look internally at ourselves to say, "How is it that our lifeblood didn't make it all the way?" We just cut the branch off.

Participant 4 suggested that Leaders need to carefully examine the problems where there is no coherence. The metaphor suggests that leaders should try to understand the communication and always work on attaining coherence, but the first step should not be to fire someone if there is no coherence. The participant expressed there "are very critical pivot points in our system, and we need to allow them time, space, and ability to always maintain that trust. . . . So, we've got to be careful about the lifeblood coming out and through" (P4) the tree. The example stresses that if the work is not reaching beyond the department or out to the intended areas of the organization, perhaps efforts should be made to diagnose and resolve the problem because it will lead to incoherence. Drastic actions, such as firing someone, may be required, but not until the problem is understood and attempts have been made to rectify it. Hence, the firing itself can lead to a disruption to coherence if done as an initial response.

The tree metaphor was also used to explain how coherence occurs in a system that has self-correcting components and some limitations. "You can't have knuckles bigger than they should be on a tree either" (P4), meaning if the knuckles are too big on a tree, they naturally break off to correct the imbalance in the system. This example would suggest that when leaders are trying to attain coherence within the organization, there may be signs or symptoms to indicate that the system is out of balance or something is not right. The other suggestion is that there might be critical components or areas that have a threshold and limited capability. If there is no awareness of the stresses put on the organizational structure, and if the stresses remain unattended, there may be consequences that occur as a form of self-

correcting in the system. For example, if a significant responsibility assigned to one department is beyond the capacity or capability, this could create incoherence. Alternatively, consideration of the biological metaphor might lead to more transparency about the operational challenges and the lack of progress. The resulting self-correction could be achieved through teaming up with another department or receiving additional resources.

Another way that the tree metaphor is powerful relates to the challenge of determining what the priorities are in employees' work. Participant 4 asked, "So how do we make sure we're all in the node, but we are not taking on responsibilities that we shouldn't give up?" The question is excellent, as it suggests the shift in work responsibilities may require some additional adjustment for employees to be successful. Work tasks may need to be transferred, terminated, or scaled back. The goal, when striving for coherence, is to know what one's core work is to support the attainment of coherence. The metaphor suggests that if the workload is not managed, and if there is no control of additional work that is taken on, it could become overwhelming.

Participant metaphors helped illuminate the creation of coherence during the enactment of the work within the organizational context. The creation of coherence within the organizational structure was presented through both a mechanical and biological lens. The examples indicated that the organizational structure has a bearing on how the information flows, how employees interact, and how the organizational structure contributes to the organization functioning in a state of coherence.

Way of being metaphor. Another metaphor that was common in this study was participants referring to coherence as a "way of being" (P2, P3, P6). Similar metaphors of a "mindset" (P1) and a "common state of mind" (P4) were also used to represent an understanding of coherence. A significant component of this metaphor is that it refers to coherence as being driven by the leaders operating with a specific understanding and way of thinking about the strategic priority and responding to the context of

the organization. A way of being does not appear to be tangible; however, when the explanations are analyzed, they reveal more about what it means to operate in this manner.

Participants stated in a variety of ways that coherence is achieved during the implementation of the strategic plan through a way of being. This approach referred to operating with a common mindset that informs their day-to-day work. Four elements stood out from the participant examples and serve to define how the participants described coherence as a way of being.

First, working in a "way of being" (P2, P3, P6) increases the ability to maintain focus on the priorities. Coherence is established when employees have "a mindset, a value, and an unwavering belief that the coherence/focus of the three-year-plan maintains and stays true to the focus" (P6). This example suggests that coherence occurs when employees can identify or reconcile their personal beliefs with the strategic plan.

The second example referenced that creating coherence is not separate from the way employees work and becomes a part of how they work. Coherence as a mindset is thus related to the way people work and the language that they use.

The third example of the way of being metaphor expressed how operating to create coherence was about always being open to learning. "Coherence as a way of being is . . . leaders constantly moving on a journey together and reexamining what is at the core of what they do" (P6). This participant also said, "Living in a way that is coherent requires a collective commitment to stay in the work of gaining understanding. Throughout this, what we've acknowledged is that we need to learn" (P6). This suggestion challenges the notion that a strategic plan is initiated and implemented without a need for correction. Instead, ongoing examination of the actions and direction are possible or commonplace. This approach to a strategic priority suggests the plan was implemented with confidence that it will achieve the desired ends. There may have been feedback loops to inform progress and to track implementation,

but rarely if ever did I see a willingness to stop the implementation process, change the strategic action, and alter the process in a significant way. The example of a common mindset suggests that being open to learning acknowledges that attaining coherence is not a linear process, and it is not something that can be thoroughly planned and implemented without continuous adjustment. It also suggests that creating coherence within the organizational structure requires awareness, adaptation, and adjustment.

Finally, the way of being metaphor acknowledges that planning is an imperfect process and may not accurately anticipate all of the events and eventualities that emerge during the implementation of the strategic plan. It was stated that "coherence isn't always knowing what to do, but with a solid understanding of what you believe in, it allows you to decide as you go" (P6). This example, similar to the previous point, reinforces the belief that creating coherence through a way of being is an ongoing effort that is informed as it is implemented. The same participant also suggested that when employees face challenges to the coherence of the work, they should accept them as opportunities, to have a conversation again "to strengthen our resolve. . . . The message in it was, this doesn't just happen" (P6). This participant put forward the idea that working in this manner is different from having someone who has expert knowledge and requiring people to follow that leader, but rather being open to having an ongoing conversation and discussion about creating coherence. The above examples reinforce the perspective that working with a common mindset "means that you work differently" (P6).

This finding identified that creating a strategic plan and describing the strategic plan is separate from the implementation of the strategic plan. This finding also emphasized that attaining coherence during the implementation of the strategic plan involves its construction through day-to-day work while it is lived in the organization.

Finding 3: There Was Little Consistency in Strategic Plan Implementation and Enactment

The final finding was that there was little consistency in the implementation and enactment of the strategic plan. The participants described how they would create coherence in the implementation of the strategic plan, sharing personal and individual approaches to the enactment of their work. This finding reveals that even though the participants espoused that they agree on why coherence is essential and what coherence involves, their description of the enactment demonstrates that they are not consistent in their approach to creating coherence. This inconsistency, in turn, demonstrates that what they espouse about being coherent may not align with their actions. Participants described three elements that contribute to this finding: how they view coherence concerning their role, what they emphasize as their priorities to create coherence, and how these priorities may represent competing areas of interest or contrasting approaches. I outline the three elements that contribute to this finding in the remainder of this section.

Differing views of coherence in terms of role. Participants presented three different views of how coherence in the strategic plan related to their roles as leaders: as defined in their job description, as defined in their work context, and as emerging from the nexus of working within the organizational context.

Participant 2 stated, “Coherence is my job,” and further elaborated that “I mean, ultimately, my role is to ensure system coherence.” This participant’s description that coherence is part of the job and the role suggests that coherence is driven by role expectations. Also implied in these statements is that if one is to meet one’s role expectations, one needs to attend to coherence. Hence, when a participant states that coherence is a requirement of the role, it gives the impression that the role is driving the need for coherence.

Participants 4 and 6 demonstrated a strong level of commitment to coherence but did not describe it as emerging from their role. They described coherence as something they attended to through their commitment to the work. Their commitment to coherence comes from a strong belief and focus on the strategic priority that is deeply considered as a way to approach the work, or a "way of being" (P6). A way of being demonstrates a bigger commitment than showing up for work and just doing the job. It suggests that a leader needs to behave or exist in a way in the organization to create coherence. Coherence as a way of being was discussed in the previous finding as an example of the enactment of coherence. Similar to a way of being, participants also described leaders operating with or creating a "spirit" (P6) or a "mindset" (P4). Participants referenced the way of being as a commitment to their role to enact coherence. Coherence was described in this sense as something that is strived for in individual ongoing actions, attended to in the day-to-day work, consistently adhered to, and lived on the job.

Similar to the above example, a final example stressed that coherence emerges through the leadership role operating within the organizational context. Constructing coherence in the organizational context involves the leaders continually moving on a journey together and reexamining how their work contributes to the creation of coherence. This example considered the nexus of the leaders operating in their roles within and through the organizational context to enact the strategic priority. Participant 4 gave examples of how creating coherence occurs in the organizational context:

> We need to connect with many people, and if we can start to make it look and feel the same for everyone, that's sort of how I see those networks coming out and growing; if we want to create that together, we need a consistent way of changing together as well. So, we need common methods of communication in what we communicate.

Employees need to be able to work in specific ways, such as "connecting," "creating together," and "changing together" (P4). It also suggests that components need to be in place within the

organizational context, such as “common methods of communication” and “networks” (P4) that are emerging and growing. The final aspect suggested by this participant was the “need to create the time and space, to have people start to connect, and that’s where I see these all coming together, and others coming in on it, too” (P4). Participant 4 gave specific examples of how to work in the leadership role within the organizational context to create coherence, suggesting that if leaders do not create these components within the organizational structure, barriers will emerge to creating coherence

Participant 3 shared an example that presents a compelling reason for a commitment to working through the role within the organizational context:

> If our commitment is to moving a system forward, not just having a system function effectively within the current parameters, actually moving it beyond the present, going beyond the status quo without coherence, you become solely dependent upon individuals in leadership positions and individual capacity is always less than what collective capacity is. You and I working in a complementary integrated way towards something, I believe I always bring a better result, than each of us working individually. Working individually, we may be able to make things happen faster, but they won’t happen in a manner that is sustained and likely not happen in a manner that we’ll see progress continue after we step out of the picture.

The above quote suggests that “working individually, we may be able to make things happen faster” (P3), but working together within the organizational context allows for collective capacity to develop. Participant 3 suggested that commitment through the role is to operate within the organizational structure to create coherence and the collective ability. These examples indicate compelling reasons for the commitment to creating coherence through the leadership role operating within the organizational context.

The other significant idea that emerges from Participant 3's comments is that building coherence in the organization must be done through the process of developing collective capacity, which in turn makes it sustainable. Essentially, working collaboratively to improve the collective capacity is a requirement; working in isolation will not necessarily create coherence. Participant 3 also indicated that "we'll see progress continue after we step out of the picture," meaning that the work of creating coherence resides within the culture of the organization, a nexus of the way people work within the organizational structure to achieve a strategic priority.

In the three examples, the participants described how coherence emerged in relation to their respective roles. One example was job-centric or driven by the job description, another was driven by the participant's mindset operating within the organization, and the third one was driven by the need to construct coherence through the commitment to the role within the organizational context. All three are unique approaches to how the participants described their role concerning coherence and the enactment of coherence. These examples emphasize different perspectives of the commitment to coherence emerging from the different views in how they take up their roles. Even though there may be similarities and overlap in the above three examples, the subtle differences might help explain why there was little consistency in the way participants described how to create coherence during the implementation and enactment of the strategic plan.

Different priorities to create coherence. The second aspect that might contribute to the lack of consistency in the way participants described how to create coherence during the implementation of the strategic plan was the priorities they emphasized. A critical part of this finding was how participants emphasized varied and diverse priorities in their description of enactment to create coherence. This subsection identifies some of the variables that might contribute to the differences, highlighting six different priorities that the participants emphasized.

Many variables likely contributed to how the participants described the process of enactment to create coherence during the interviews. These differences may relate to how they tell the story or process of enactment. The organizational context may also impact the process of enactment. The participants suggested the difference could relate to their "leadership style or personality" (P1), "how they approach decision-making" (P3), how their role is networked or how their "role in the organization allows for the connections" (P4) with the broader organization, the opportunities that the role affords them to be aware of what is happening throughout the organization (P4, P5), and how they "view their role" (P2). Despite the many variables that one could surmise that might influence the participant descriptions, the participants clearly articulated different priorities for the enactment of coherence and emphasized different approaches to create coherence.

It became apparent that there were differences in what the participants described as actions to create coherence, what they emphasized as priorities, and what approach they demonstrated. It was also clear that the priority a participant selected would likely influence the approach. A wide variety of descriptions emerged to represent the leadership preference, motivation, or orientation to action that would be followed to enact coherence.

Decisiveness and urgency, quick action. Two participants (P1 and P2) emphasized a priority focus on decisiveness and urgency. The focus on decisiveness and urgency leads to limited consultation and quicker action to initiate the work. Their orientation to action was to use evidence or progress being made to determine the next steps and to move to action right away. Decisiveness was also stated when the participant discovered that the structure, an employee, or a policy was inhibiting the ability to work coherently. In this instance, Participant 2 described a decisive action to eliminate the barrier. The other participants in this study did not emphasize the same level of decisiveness or urgency when they

described their approach to the creation of coherence. A focus that emphasized decisiveness and urgency would mean the approach to creating coherence would be implemented quickly.

Direct, linear, and mechanistic. Beyond the emphasis on decisiveness and urgency as in the previous approach, the direct and linear approach was also quickly initiated because a planned approached to create coherence was already known. Participant 1 described a planned path about how to create coherence. The participant articulated the following stages in the approach to creating coherence: define what the result or outcome will look like, share the outcome with those who will be involved, plan the necessary steps to get there, establish a mechanism for implementation and assess the progress, and course-correct where necessary. The priority for this approach is an emphasis on a direct, linear, and mechanistic creation of coherence, with the approach clearly laid out, perhaps even visible. The pace for this approach would be quick, with little consultation, if any.

Create coherence through organizational knowledge and awareness. This approach is focused on creating coherence based on the understanding of how best to utilize organizational knowledge and awareness. Two participants (P4 and P5) emphasized the importance of having access to information and being aware of what is happening across the organization to design the work to create coherence. They indicated that the first step would be the engagement of others in the organization because they felt they did not have all the information to make the decisions and guide the work. They provided three examples of why this consultation would occur.

First, to proceed with the work, they did not have enough knowledge about the end-users to make the decisions to design, develop, and implement the work. Participant 4 indicated, “We are holding focus groups with people to see what is it that they need so that we have the people closest to the work helping us decide what the work should be.” This example explains that direction, information, and a connection to the end-users is required to enact something that creates coherence.

Second, the participants knew the problem they were trying to solve, but they did not know the solution. The engagement of stakeholders was a critical stage to enable them to arrive at a solution. Participant 5 explained a situation where a solution did not work out, “so sometimes I think when decisions fail, it’s because we’re asking the wrong people to do the right things.”

Third, participants needed to know who else is working on similar work in the organization. By knowing how their work intersects with the work of others doing similar or aligned work, they were better able to design the work, make it coherent with the work across the broad organization, and predict if it would have the desired impact. Participant 4 expressed that coherence is also about communicating the individual department work to the rest of the organization, and about ensuring people are not isolated from information within the organization.

This participant also reinforced that each department is responsible for cascading the work to create awareness and understanding in the organization, as well as knowing where work links with other work in the organization. Participant 4 stated that a mechanism or process is needed because “you can have the system saying, ‘We need to pay attention,’ and then, nobody is paying attention to it. But if you don’t have a way of knowing what everyone is looking at” you may not be aware, and you cannot participate. Also, it was stressed that “it’s really important . . . to be invited, not just invited, but valued and to find the time to participate, and then you own it as well because you’re a part of that” (P4).

Participant 4 further expressed that the organizational structure and the procedures must facilitate communication. Networking the system to allow for employees connected to the work to be aware and to allow these same employees to be included in communications and meetings will facilitate understanding and awareness to create coherence. The execution of this approach is dependent on whether the current organizational structure already facilitates its implementation or if the avenues for working this way need to be established within the organization.

A necessary first step in coherence is the engagement process of other employees. To achieve this, participants said the organization has to be inclusive: all leaders must have access to information, to participate in meetings to build a better understanding of the organization, and to be connected to the network to enable them to gain information. The participants who created coherence in this way held roles which were centralized but narrower in focus, and because of this positioning, they did not have as many opportunities to connect and network with the broader organization. These participants identified that the structure of the organization and leadership expectations must support networking and connecting of leaders across the organization. This approach would prioritize shared understanding and development of coherence within the organization. It would not demonstrate the same level of decisiveness and urgency as the first two approaches.

Framing the work within the organization. Framing the work emphasized how coherence was established in the organization. This approach focused on exploiting the structure of the organization to design the work to be coherent with it. Participant 6 indicated, "I think that something that I've learned along the way is that framing, it's not everything, but it's pretty damn close." Framing the work to be coherent within the organizational context was the most crucial step, as stated by this participant.

This approach was different from others because the emphasis was on the framing of the work to inform the design. An example of the first step was, "I think we were so deliberate about even naming the topic; this is about creating the conditions" (P6) for the strategic priority. The example referenced that when the work is framed correctly, it will be coherent with the foundational components. It also means attaching the work to the strongest part of the organization, the foundational statements, which will allow it to adhere and be resilient. Participant 6 explained how this approach creates resilience because "we do have an unshakeable foundation and a very deliberate and intentional focus on this work."

Participant 6 explained that when work is coherent from the start, it proceeds smoothly in the organization because there is no need for approval before it can be initiated. No approval is necessary for initiatives because coherence is built into the process as it is designed, and therefore, because of the ongoing refinement in a public manner, approval is not an event at the end of the design. The opposite of this example was explained as a process where projects are designed in relative isolation and then are brought forward for approval. This approach can result in proposals being rejected, or going back and forth through a cycle of repeated proposals that require fixing, adjusting, and eventually approval if they become coherent with the organizational priorities.

The orientation to action for the framing approach might be a little slower because of the upfront planning. Once the design is finalized and the work starts, however, the progress will be steady and ongoing. The steady progress with necessary refinement means the project becomes a part of the day-to-day work that is not tied to the yearly cycle of strategic planning and budgeting. Participant 6 explained that ongoing adjustments would be required because "we've acknowledged . . . we need to learn." Framing coherence into the design causes it to become part of the organizational context, and it will be lived deeper in the organization. Finally, Participant 6 suggested that it would face fewer challenges because it is framed in the "unshakeable foundation" with the "intentional focus on this work." Similar to the above approach, this approach would take time to plan, develop, and implement. It would not demonstrate the same level of urgency as the first two approaches and would allow for consultation and dialogue, which might appear as being less decisive.

Enactment is the work to create coherence. This approach emphasizes that coherence emerges out of the day-to-day work of employees in the organizational context. Participants indicated that employees need to learn, adjust the work within the context, or adjust the organizational structure for coherence to develop. This approach acknowledges that the process of predicting what is required,

developing a strategic plan, and implementing that plan is not a perfect process. All eventualities cannot be anticipated when a strategic plan is created, and therefore, in some instances, it is not possible to plan for what the organization may face. Participant 3 indicated that "we don't always know where things are going to go" (P3) or what will emerge that might be out of the planners' control.

Further to this notion, Participant 6 also referred to not being able to anticipate everything:

> It's not that everything is decided ahead of time and then regardless . . . the living presence of the place, the people, the topic matter, and therefore necessarily influences what unfolds. So, it's taking up the topic at this time and this place in the company of one another. When leaders operate coherently, it allows them to recognize what they need to learn, I think part of that has been recognizing that we need to learn. We need to evolve our practices. We need to constantly strengthen them. And we need to never be done with this work. That we have to be forever mindful.

This approach places value in leadership that is responsive and able to adapt to the context. It requires leaders to make decisions about coherence while working on the day-to-day work. When coherence is developed through the work in the organizational context, it connotes a way of working which might be different from the way leaders normally work. It differs from the many planned processes in strategic actions because it does not follow a linear or step-by-step approach. A beginning point or an ending point of the implementation of a strategic plan was not explained because this work is continuous and ongoing. This approach emphasized that specific "touchpoints or anchor points" (P6) need to be understood. Progress should be monitored based on the touchpoints to ensure the work continues to create coherence. Otherwise, adjustments may be needed. The enactment of coherence means that employees are working differently; they agree to hold one another accountable to this

outcome, and they support one another. Participant 6 also suggested that the idea is not about becoming coherent but rather being coherent in one's day-to-day work.

This process involves an organizational structure that is different from a traditional hierarchy. Participant 3 spoke about how this approach embodies the leader operating in a specific manner within the organizational structure to achieve the strategic priority: "Great organizations have the elements that make the organization successful, so deeply ingrained in their organizational DNA, that a leader . . . is almost influenced to lead in a particular way because of that culture" (P3). This comment aligns with statements made by Participants 3, 4, and 6 about leaders operating with a common way of being reinforced by individual and collective accountability for the creation of coherence within the organizational context. Similar to the previous approach, working in this manner is dependent on the current organizational structure facilitating employees to work in ways required for the creation of coherence.

Coherence through collaboration to make it sustainable. The emphasis in this approach is to create coherence within the organizational structure to support the work in being sustainable. It also emphasizes the importance of collaboration in the organization to create coherence (P3). To exemplify this approach, Participant 3 referred to how the approach may be different, depending on the organizational context:

> If you want to go fast, go alone; if you want to go far, go together. That's what I want to do. I want to go far with people, and I want them to feel that they've gone far, and it is what you're focusing on that ultimately makes that possible. . . . If it's not present, then the distance isn't possible . . . You need to have the means by which to hold people together, and you need to have the means by which to act in ongoing, sustainable, and predictable ways.

Participant 3 indicated the importance of engaging employees in the effort to build the capacity to create coherence. This priority suggests that collectively, developing an understanding of what needs to be done and building it together to create coherence will make it sustainable. The timeline cannot be the primary driver of the direction to attain coherence.

Participant 3 also referred to the differences between developing coherence from a current practice or position of compliance, or from a current practice or position of collaboration. Participant 3 stated, “Recognizing that we have a history of compliance, and we are learning to work in a way of coherence, which is most similar to working through collaboration”. Further to this, “compliance is about creating an expected behaviour, while coherence is about honouring the contribution of individuals”(P3). This participant made the connection to working in the way of collaboration as similar to the way of working through coherence.

The structure of the organization supports the enactment to create coherence. The emphasis in this approach is on the structure of the organization as a critical component to creating and maintaining coherence. All participants mentioned how strategic work is connected to the structure of the organization. Participants described in varying ways how the structure of the organization supports or hinders the development of coherence. “If the structure drives the work, it reinforces the structure” (P2), which can become a barrier to coherence; however, if work is at the forefront, the structure can be adjusted to ensure it supports the work to create coherence.

This approach emphasizes that the structure of the organization must support the implementation of the work. Otherwise, the structure will be a barrier to the work proceeding. The participants described different ways as to how they would work with the organizational structure to create coherence. The organizational structure is something that needs to be understood (all participants), something one needs to respond to (P1, P4, P5), something one needs to control (all participants), and something one might

need to change to create coherence (P2, P3, P6). Organizational structure was unique as an area of emphasis because all participants identified it as an essential element in creating coherence, as noted in the Zone of Coherence, Figure 3. However, there were varied reasons as to why coherence in the organizational structure was necessary or how it would be achieved. The emphasis on organizational structure often included work in conjunction with other approaches.

In summary, the second element of Finding 3 focused on the priorities the participants emphasized for the creation of coherence. The variation in the priorities they emphasized led to them describing different approaches for the creation of coherence. Building on the Zone of Coherence, Figure 3, the differences in priorities and the differences in approaches reinforces that there are diverse views on how to attain coherence.

Competing areas of interest or contrasting approaches. The final section of Finding 3 focuses on how the participants described the creation of coherence during the implementation of the strategic plan, and how the areas of emphasis and different approaches could be viewed as competing or contrasting. This study revealed that participants described the creation of coherence in several ways, and many variables likely contributed to how they chose their examples of enactment to create coherence. The differences emerged in the context of the situation they were describing, their leadership style, their personality, their position in the organization, how they make decisions, and their view of the enactment of coherence in the organization. The differences in the descriptions related to whether the participants were speaking from experience or hypothetically, from the point of view used to tell the story, from the clarity in the description, as well as other variables, as I explain below.

Factual or hypothetical example. The examples shared for the explanations of how to create coherence were based either on fact or were hypothetical. Most often the description referred to something that had already occurred or was occurring in the organization; hence, the participants were

describing what had already happened. Often they would describe an event that referred to creating coherence or a barrier that prevented coherence, and the participants would mainly share the event, but not provide background information. Occasionally, examples were expressed as hypothetical, but this was rare. This observation is relevant because it causes me to believe the participants were speaking from their actual experiences of creating coherence.

Point of view. All participants explained how to create coherence from a first-person perspective, using pronouns when describing how to create coherence. At times they used a third-person omniscient perspective, narrating to illuminate what was beyond what they would see from the first-person perspective.

Specific or general description. Some approaches were defined clearly, and others were less defined. Descriptions of well-thought-out approaches were reasonably specific. Descriptions of approaches that involved collaboration or consultation to first gain information tended to be about the process. Even though participants (P3 and P4) described the process, they were able to describe the end state when coherence was created. The differences in the detail of the explanations demonstrate the variety of contexts in which coherence occurs and differences in how it can be created.

Collaborative or compliance perspective. When participants gave examples of creating coherence, they primarily spoke from a collaborative leadership approach; however, there were examples of issues that needed to be addressed through a compliance approach. One example of creating coherence through compliance was made in reference to the structure of the organization. Participant 2 described how the work needs to proceed and not be inhibited by the structure of the organization. Participant 3's example referred to building coherence within the existing organizational culture, which might align more with a compliance approach. This example was important because it was expressed

that working in a way of coherence means working more openly, collaboratively, and transparently, which would likely align more with a collaborative lens.

The pace of the approach. The pace of the approaches ranged from urgent to less urgent, fast to leisurely, and time-specific to less time-specific, but ongoing. Some approaches are likely driven or restricted by the time for them to occur, whereas others might be restricted by budget, which most often has a time factor built into it.

Point of leverage. The point of leverage to create coherence varied. The concept of point of leverage is based on the assumption that a solution can be applied to the structure of a system that causes a large amount of change. Often the point of leverage was described as having the strategic work emanate from and align with the focus on the strategic priority or the strategic plan. The focus on the strategic priority was a response from all participants, and as Figure 3 indicates, it also demonstrated a further refined approach to creating coherence. A further point of leverage that stood out as significant was coherence emerging from the work. Coherence emerging from the work means that beyond the strategic priority, the work to create coherence needs to be refined through the work in the organization.

Another example was Participant 1's use of a mechanism to manage and control the organizational structure to create coherence. Finally, it was also stated that positioning the leader within the work while operating with a common state of mind or a common mindset was a point of leverage. The various points of leverage shared by the participants illustrate the variety of ways that educational leaders can work within the organizational structure to create coherence.

Description or story of coherence. Participants discussed creating coherence in a variety of ways. Some examples were shared as descriptions of creating coherence; others were told as stories of creating coherence. Descriptions of creating coherence tended to be more succinct or matter of fact. One example was a participant who concisely described the creation of coherence as naming the components,

outlining the steps, and taking definitive action. The stories of creating coherence tended to be much more animated and descriptive. One example was a participant who told the story for the creation of coherence as an almost ethereal or intangible process, if not a spirit. The two approaches to describing the creation of coherence give markedly divergent perspectives on how coherence is created.

The different manners in which the participants described the creation of coherence during the implementation of the strategic priority reflect different perspectives. It is not possible to determine if this may influence the reader's perception of how the participants created coherence.

Contrasting approaches. With a variety of approaches suggested for creating coherence, there is a risk that they may be viewed as contrasting approaches or driven by competing areas of interest. The variety of approaches emphasized in the creation of coherence demonstrates the complexity of this phenomenon. The different emphasis and variety of approaches to creating coherence in the organization were shared with commitment and conviction, included thick and rich descriptions, and were supported by artifacts to enhance understanding. The actions that the participants described were based on their beliefs that those actions would create coherence in the organization. The variety of ways to enact coherence demonstrated in this research is likely what occurs in the actual practice of enacting coherence.

The examples of enactment to create coherence represent tasks with specific values that could be viewed as contrasting. The following paragraphs list some examples of potentially contrasting perspectives on the creation of coherence.

Mechanistic versus collaborative. As previously mentioned in this finding, the mechanistic approach is straightforward and views the implementation as adding to or managing the organizational structure with a mechanism. The mechanistic approach is based on the premise that the method to create coherence within the organizational context is already known. In this approach, coherence is attained

through a predetermined plan to implement a tool or strategy as a point of leverage. The collaborative approach was described as needing collaboration to inform the path that the work would take and as using collaboration to build consensus regarding the approach to creating coherence. These approaches would likely require different lengths of time to implement. The mechanistic approach is achieved at a quicker pace, and the collaborative approach at a slower pace to allow for collaboration and the development of ideas. These approaches could appeal to a variety of leadership situations, depending on the work that needs to be done and on the culture of the organization. It is unlikely that these approaches would be used simultaneously for similar work in similar departments without conflict emerging, which could cause incoherence.

Linear versus iterative approaches. These two examples were contrasting because the linear approach appeared to be well laid out from the onset. It appeared that adjustments would be minimal for the linear approach because the plan and implementation were visible and clearly articulated. The complex iterative approach, in contrast, was intentionally planned only to a certain point, allowing feedback to inform the work and for steps to be reworked back to the beginning, if necessary, to create coherence. These approaches would likely require different lengths of time to implement, linear being achieved at a quicker pace, depending on the work required. The iterative approach would proceed at a slow, steady pace, as it allows for iterations to be created, tested, reviewed, and further informed.

Sustainability over the long term versus immediate action over the short term. The approach identified in this research indicated that coherence is created through a consistently focused three-year plan implemented over several years. This approach creates coherence because of the sustainable long-term focus. The opposite of this approach would include short-term changes that require immediate action. An example of instances that require short-term change or immediate action are budget restraints or government or school jurisdiction initiatives, which can be both internally and externally driven.

Participant 2 shared examples of being able to merge these two approaches. This participant was successful in merging the approaches because the short-term initiatives had enough similarity to the jurisdiction work that they could be planned and implemented according to the jurisdiction's needs. It was also said that establishing a thorough "relational trust" with the other entity was important to support the dialogue necessary to bridge the understanding. In situations where the gaps cannot be reconciled to meet each approach, it could lead to incoherence being created.

Tangible versus intangible approaches. The participants gave examples of approaches that were tangible, meaning they were easy to see happening and progress was easy to measure, and examples that were not as tangible, less visible, and harder to measure. This example of contrast is similar to the two examples shared above that revealed how the participants talked about the creation of coherence either by describing it concretely or by telling a story.

Individual approach versus a collaborative approach. These two approaches emerged from personal preference, organizational expectation, and being dependent on the individual strategic action. Participant 4 noted that in some organizations, a collaborative approach would not be expected; an individual approach with individual accountability may be the expectation. Participant 3 was previously quoted as emphasizing a preference for collaboration to make the change sustainable. This participant said, "If you want to go fast, go alone; if you want to go far, go together." At times, a strategic action requires quick implementation and limited consultation. The examples from the participants in this study demonstrate that a collaborative approach is most closely aligned with a leadership approach that creates coherence because of the need to work in a manner that is transparent, open, and collaborative. Employees or departments that are more focused on an individual or individual department approach may not be positioned to create coherence through a more collaborative approach.

Specific defined action versus an ongoing way of being. A few examples of specifically defined action were shared in this research. Participant 5 referred to ensuring that all employees in a department are able to see their work within the three-year plan. Also, the participants shared many examples that referred to coherence being created by leaders working in an ongoing manner as a way of being or from a specific mindset. These two approaches may be contrasting, and they may be complementary as well. It is feasible that both approaches could co-occur.

Complementary and contrasting approaches. Based on the priorities that the participants emphasized to create coherence and how these priorities inform the approaches to create coherence, the approaches could be complementary or contrasting. Complementary approaches could potentially enhance the creation of coherence, and the contrasting approaches could lead to various views or perceptions that could potentially hinder the creation of coherence. The different areas of emphasis were vast and sometimes opposite. For example, Participant 1 expressed a strong sense of urgency as a priority, compared to Participant 3, who expressed that building coherence through collaborative means is the priority. Both participants presented a valid means for building coherence through the enactment of the strategic plan, yet they would appear to be entirely different, or perhaps even conflicting, when enacted.

Participants 2 and 4 described how to create coherence highlighting two different areas of emphasis related to the urgency of their approaches. In the example that Participant 4 described, the emphasis was a leadership approach through modelling, being referential, collaborating, and seeking to understand, as well as being a custodian or steward to hold something in trust for others. All of these qualities meant the participant had to move at a pace that allowed for consultation and collaboration. Participant 2's approach required having a laser focus, having a high sense of urgency, ensuring networks and pathways for communication, working together, and ensuring the structure of the

organization supported the creation of coherence. The above examples demonstrate different areas of emphasis and different approaches to creating coherence. Further to the above, both participants expressed additional differences concerning the enactment of work to create coherence.

Participant 4 described how the creation of coherence was like a "baby sleeping in a cradle." The example relied on relational trust, having a common state of mind, and the system having balance so that the baby can sleep or the leader can operate without always having to be aware. To achieve coherence through this action, the leader also stressed the importance of having a highly nested or networked system. This participant also displayed less urgency in the approach compared to other participants. The rationale for the level of urgency was that because this participant's position was one that indirectly impacts student success, consultation and collaboration are often needed to gain the necessary information to make an informed decision. This example demonstrates that this participant was acting with a high level of internal accountability, but for someone who held a preference for a high level of urgency or was in a situation that required immediate action, this approach could be problematic.

Participant 2 spoke about the creation of coherence with a high level of urgency. Participant 2 used the stairwell as a metaphor to reference that there is a need to build networks and pathways for communication and working together, which is, at times, counter to the way the organization is structured. This participant also expressed that sometimes employees need to do what is necessary to gain the information they need and to work towards attaining coherence. Mindset and mental models were critically important, in Participant 2's opinion, to allow the organization to be flexible and responsive to meet the needs of coherence. The main attributes in Participant 2's approach were maintaining a clear laser focus, having a high sense of urgency, ensuring the priorities are driving the work, and being responsive to the focus on student success.

The variety of approaches to enactment might cause confusion among leaders if they are viewed as conflicting or contradictory. If this is the case, the variety of approaches and various points of emphasis could potentially lead to incoherence. This finding shows that selecting an area of emphasis or priority creates a focus that is potentially different from other areas of focus. For example, when a participant focused on structure or mechanism, following a process and sticking to a schedule were emphasized. In contrast, when another participant focused on collaboration, the emphasis was on gathering information and creating the path together collaboratively.

The final finding revealed participants are not consistent in describing how coherence is created during the implementation of the strategic plan, even though they agreed on why coherence is essential and what coherence involves. Many examples provided insight into how they described the creation of coherence and what they emphasized as important. This finding indicates that how the participants describe coherence may not align with their actions to create coherence. Three elements contribute to this understanding: how they view coherence concerning their role, what they emphasize as their priorities to create coherence, and how these priorities represent competing areas of interest or contrasting approaches.

Consistency and Agreement in the Study

The findings in this study demonstrated areas of consistency and agreement, and areas of little consistency and agreement, about what creates coherence (see Appendix F, Table F1). In Finding 1, there was general agreement in most areas. It was significant that the participants were able to share consistent examples demonstrating the importance of coherence, the common elements of coherence, and the common barriers of coherence. The participants all referred to the same common elements and barriers. Some differences emerged in which components they emphasized the most. The Zone of Coherence, Figure 3, demonstrates how these differences occurred. For example, Participant 1 referred

to structure three times more often than to shared understanding, whereas Participant 5 did the opposite, with a greater emphasis on shared understanding and a lesser emphasis on the structure of the organization. Participant 3, in contrast, referred to all three of the components of coherence relatively equally. Generally, the data that inform this finding show a high degree of agreement among the participants about the components required for the definition of coherence.

There was only one consistent area or aspect of general agreement for Finding 2: the use of metaphor or metaphorical statements to describe how coherence was created. Five of the six participants used metaphor as a way of further explaining coherence, and all participants used metaphorical statements to describe how coherence was created. For the most part, in this finding, there was very little agreement or consistency beyond that. The way the participants described the enactment of their work to create coherence was individual and not consistent among them. Unlike in Finding 1, where common themes and consistent patterns could be derived to describe what coherence was, it was not possible to do this for the enactment of work to create coherence or to describe a consistent way of how to create coherence. Participants uniquely described how they took up the enactment of the work to be coherent with the strategic plan, which was discerned in the language they used to describe their experience of enacting the strategic plan. As a result of the individual perspectives, Finding 2 demonstrated little agreement or consistency.

Finding 3 focused on how coherence is achieved in the implementation of the strategic plan. The participants emphasized different priorities in how to create coherence. When the participants described different approaches to creating coherence, they may be competing or contrasting with other approaches. The wide variety of priorities and resulting approaches to coherence likely indicates that the enactment of work to create coherence is a complex process with multiple views on how to achieve that outcome.

The next chapter is a discussion, interpretation, and synthesis of the findings. This chapter focused on the analysis of this case study and presentation of findings, and the next chapter provides interpretive insights compared to the existing literature to build a holistic understanding of coherence during the implementation of the strategic plan.

Summary

This chapter began with a review of this study's research questions. Based on the analysis of the study, one finding emerged from the first research question: How do school jurisdictions' senior administrative decision-makers define coherence? The Definition of Coherence and the Zone of Coherence were created from the data to illustrate the finding (see Figures 2 and 3, respectively). Two findings emerged from the second research question: How are those leaders involved, directly and indirectly, in achieving coherency during the implementation of the strategic plan? First, coherence is created through the enactment of the strategic plan, and second, there was little consistency in the way participants described how to create coherence during the implementation and enactment of the strategic plan.

Chapter 5: Discussion and Analysis

The purpose of this chapter is to provide interpretive insights into these findings within the existing theory and research literature in the field. This chapter was guided by the following questions:

- Why is consistency lacking between how the participants defined coherence and how they described the creation of coherence?
- How do the strategic plan and enactment of the strategic plan impact coherence?
- What are the challenges and limitations on achieving coherence based on the findings of this study?

This chapter focuses on three key themes. First, it is a myth that strategic plans create coherence; it is a false assumption for leaders to make. Second, there is a disconnect between the conceptualization of coherence and the enactment of coherence. Third, having individual district leaders agree with the strategic plan does not create coherence. I discuss each theme in turn.

Theme 1: Strategic Plans Do Not Create Coherence

This study found that the strategic plan does not guarantee the creation of coherence. In this section I consider how the strategic plan contributes to the disconnect between the conceptualization of coherence and the enactment of coherence. I also examine how the strategic planning process and the design of strategic plans can pose limitations and challenges to the creation of coherence.

This study found common agreement on the definition of coherence and a belief that the strategic plan contributed to the creation of coherence. The participants indicated there was a direct connection between the strategic plan and creating coherence. There was also agreement that coherence is constructed as it is lived in the organization. However, there was little consistency when participants shared examples of how to create coherence during the implementation of the strategic plan. The

participants emphasized different priorities and different approaches to creating coherence. Some of the priorities and approaches are likely viewed as competing or contrasting.

The literature assists in understanding how strategic planning may challenge or limit the formation of coherence. It reinforces the theme; it is a myth that strategic plans themselves create coherence. The following subsections discuss the origin and purpose of strategic planning, the analytical approach to the development of strategic plans, the suggested dichotomy of formulation and implementation, the analytical approach used to the develop strategic plans, and the type of change a strategic plan supports.

Origin and purpose of strategic planning. The literature identifies varying beliefs about the effectiveness of strategic planning and the implementation of the strategic plan to improve organizations. The debate about the effectiveness and the challenges of strategic planning has been ongoing for almost 30 years. Strategic planning was novel when it was first introduced and "has become orthodox practice now" (Poister, Pitts, & Hamilton Edwards, 2010, p. 22). In the research context where this study occurred, strategic planning is a required accountability component.

Bryson (2010) has long been a proponent of strategic planning and has researched it for almost 30 years. He indicated he is much more optimistic regarding the future of strategic planning. Almost 30 years ago, at the onset, he and Bill Roering argued that because the "typical purpose was to change an organization . . . the normal expectation ought to be that strategic planning will fail" (Bryson, 2010, p. 263).

Mintzberg (1994) is one of strategic planning's most vocal critics and is noted for the foundational critique of strategic planning, *The Rise and Fall of Strategic Planning*. He suggested that strategic planning has origins that emerge from "Taylorism" (Mintzberg, 1994, p. 302). The intention of strategic planning was to accomplish the same results as Taylorism, to increase the effectiveness of

managerial work in the same manner that was done for production work (Mintzberg, 1994). Foundational to this type of logic is reductionism that relies on cutting up a system to understand it, but the analytical method used destroys what it seeks to understand (McMurtry & Pare, 2008). The challenge with this approach is that planning and strategy-making have different needs, such as "creativity and synthesis, which depends on the discretion of informed actors" (Mintzberg, 1994, p. 303).

Inherent in the strategic planning process is a strong focus on control that has fostered a legacy of traits that may remain today. In 1994, Mintzberg suggested that the focus on control reinforced centralized strategy making, tended toward conservatism, and could breed a climate of conformity and inflexibility that favoured incremental, generic change.

The dichotomy of formulation and implementation. In strategic planning, there is an inherent assumption that thinking and action can be separated (Mintzberg, 1994). The separation assumes thinking and acting are two separate functions potentially done by different employees. This may be reinforced by a historical top-down organizational structure: those at the top were assumed to have a better purview of the organization and more organizational knowledge to create the strategic plan. Mintzberg (1994) described the assumption that thinking and action can be separated as a "dichotomy between formulation and implementation" (p. 257) in strategic planning. He further asserted that "every failure of implementation, is by definition, also a failure of formulation" (Mintzberg, 1994, p. 25). Ball et al. (2012) stated that policy must be considered beyond the process of implementation: If the focus is primarily on implementation, it "will not result in policy or strategy being put into action or into practice" (p. 3). A process of enactment is more effective. Enactment considers the history, context, and resources available. Also, the process of enactment, as noted in Chapter 1, is where policies are "made sense of, mediated, and struggled over" (Braun et al., 2011, p. 3).

Mintzberg's (1994) example of the dichotomy of formulation and implementation is relevant to this study. An example of this dichotomy was when participants defined coherence similarly, yet explained how to create it in different ways. This contrast demonstrates agreement on the formulation or thinking, but not on the implementation or action. Another example was the vast differences in the metaphors the participants used to describe how to create coherence. The strategic planning process in this study demonstrates a separation between thinking and action.

The educational literature presents two perspectives on strategic planning, which indicates a shift may be occurring. The first is a linear approach that retains the separation between thinking and acting. In this approach, the strategic plan is created, and then, the subsequent implementation plan is developed. This approach is similar to those driven by a government that impose accountability requirements such as a yearly planning and budgeting cycle. Evidence of accepting this approach was still dominant in the literature.

The second approach is an iterative nonlinear process that relies on observations and actions occurring during the day-to-day work to emerge and drive the formulation of the strategic plan. This approach is far less common and appears to be emerging and developing. This nonlinear approach tends to diminish the separation between thinking and acting and merges the two. Examples of this approach include the coherence of inquiry (Timperley, 2011b) and the coherence making framework (Fullan & Quinn, 2016). This approach indicates a shift from a strictly top-down process to one that is more integrated and ongoing, allowing formulation and implementation to be blended. As well, this would allow for a seamless and fluid development of coherence. As previously mentioned, Lissack and Roos (2001) expressed that coherence is not something that one can set out to create through coercion; rather, understanding how the initiative aligns and interacts within the organization can support the emergence of coherence.

A strategic planning process that holds the assumption that thinking and action can be separated is likely to limit the development of coherence. The only exception would be organizations that are not very complex. However, the separation between thinking and action would not be viable in complex systems (Mintzberg, 1994).

Analytical approach to the development of strategic plans. The concern with the "assumption underlying strategic planning is that analysis will produce synthesis" (Mintzberg, 1994, p. 13). A strong focus on analysis is similar to the reductionist approach (McMurtry & Pare, 2008), which intends to break something down into finite details to understand it, but unfortunately, this tends to oppose building coherence. The analytical approach reinforces separation, such as the separation of thinking and action. In complex systems, this type of approach runs the risk of missing the interrelationships and dynamic connections between the components (McMurtry & Pare, 2008). A strategic planning approach similar to this description would not support the creation of coherence, which requires an ability to understand and see the whole organization functioning. In this study, the participants indicated that when all leaders have access to information, participate in the necessary meetings, and are connected through a network, they build a better understanding of the organization to create coherence.

The strategic plan tied to the existing organizational structure might limit progress to incremental change. Another component that might challenge the development of coherence is that, often, strategic planning processes overlay and are designed according to the organizational structure (Mintzberg, 1994, p. 177). This makes it "difficult to consider changes that reconfigure the organizational structure" (Mintzberg, 1994, p. 86) because serious shifts in strategy generally tend to require shifts in the organizational structure. When strategies are developed that are "consistent with the established orientation of the organization" (Mintzberg, 1994, p. 175), they will likely result in incremental change, rather than quantum change.

Kotter (2007) noted that organizational structures, like hierarchies, are designed to resist change and do not pivot well. He suggested that their "effectiveness in the day-to-day managerial needs of organizations has been proven to be unmatched" (Kotter, 2007, p. 3), and rather than trying to eliminate the hierarchy, it is better to introduce a network to it. Many other examples from the educational literature have focused on understanding the structure, managing elements of the structure, and working within the organizational structure of a system to support the implementation of the strategic priority to allow for and support coherence (Childress et al., 2006; Haslam & Turnbull, 2011; Johnson & Chrispeels, 2010). In this study, the organizational structure emerged as one component that was static and relatively constant. Other components that are fundamental to strategic plans and creating coherence tended to be easier to change. The participants tended to go through a hierarchy of understanding and control, and eventually considered changing the organizational structure if required to create coherence. This example demonstrates that some participants did not consider revising the organizational structure as a viable first option in the strategic planning process. Mintzberg (1994) identified that limits in the strategic planning process, such as building on the organizational structure, do not allow for the creation of quantum change. Failure to impact the organizational structure may prevent strategic planning from delivering on one of the original intentions, to change organizations (Bryson, 2010).

This theme considers whether the strategic planning process supported the development of coherence or conflicted with or inhibited the development of coherence. For coherence to occur within a strategic plan, it requires conditions and qualities that are fundamentally different from some of the foundational components in strategic planning. To create coherence from the strategic plan, employees need opportunities to participate in an ongoing process of understanding that facilitates the conceptualization of coherence and the enactment of coherence through shared understanding, alignment of purposes, and collective ownership.

Theme 2: There Is a Disconnect Between the Conceptualization and Enactment of Coherence

In this theme I discuss what other factors might contribute to understanding why the six participants in this study defined coherence in a similar ways but described how to create coherence in different ways. I present other factors that might contribute to there being a difference between the conceptualization of coherence and the enactment of coherence. The following subsections discuss the challenge of moving from thinking to acting and employee decision-making.

The challenge of moving from thinking to acting. As mentioned in the previous theme, a separation between thinking and acting, or formulation and implementation, presents a significant challenge. Beyond the approach to strategic planning, it may be challenging for employees to move from thinking to acting, or to find ways for thinking and acting to be more integrated. Some research has identified that employee reasoning might contribute to the separation between thinking to acting. For example, Argyris (2010) examined the behaviours of actors in thousands of case studies and found that people operate with a gap between their espoused beliefs and their lived practice. He determined it was common for individuals to describe how they would do something based on their espoused values, but acknowledged it is much more complex to operate in this manner.

Argyris (2010) categorized two prominent types of reasoning: defensive reasoning and productive reasoning. If people operate with a defensive reasoning mindset, the status quo tends to be retained and prevents change (Argyris, 1993, 2010). A defensive reasoning mindset would likely fit well with a separation between thinking and acting, or a reductionist approach, because the employee has a narrower view of the organization and is not able to understand or know the organization as a whole. The defensive reasoning mindset also encourages the employee to hold a limited purview of the organization. One participant gave the example of working in a previous organization where employees were not encouraged to understand the organization beyond their department, which might contribute to

a defensive reasoning mindset, but this participant felt it would be a barrier to creating coherence. Argyris (2010) found that "very few individuals can routinely act on their espoused values, and they are often unaware of this limitation" (p. 64).

All the participants in this study talked about working in a specific way to allow for coherence to be created. The statements suggested that coherence "doesn't just happen . . . it means that you work differently" (P6). Working in the way of coherence means working more openly, collaboratively, and transparently. This concept aligns well with Argyris's (2010) description of productive reasoning. In productive reasoning, actors make their views public and transparent, as well as allow their claims to be robustly tested. Those who were skillful and successful in using productive reasoning were able to make better decisions and operated with a broader understanding of themselves (Argyris, 2010). This finding demonstrates that employees might be influenced by the type of reasoning they use and how the organizational components, such as strategic plans or organizational expectations, might influence their ability to work in ways to create coherence. It also highlights the importance of finding ways to support working in open, collaborative, and transparent ways that allow for productive reasoning, which might assist with establishing coherence when moving from thinking to acting or bridging the two.

The approach to strategic planning should support the level of complexity of the organization. Lack of understanding of organizational complexity might explain why there is a disconnect between the conceptualization of coherence and its enactment. The original perspectives on strategic planning supported the idea of predetermination, which meant one could theoretically stop a system to understand it (Mintzberg, 1994, p. 13). The belief that a system could be stopped reinforces the idea that the system is not very complicated or complex and is predictable. When a system is perceived as predictable, it supports an analytical or reductionist approach, which creates results such as separating thinking from

acting. This approach might be viable for organizations where the thinking resides solely in the centre, but often, “strategic thinking cannot be concentrated at one center” (Mintzberg, 1994, p. 286).

The above paragraph highlights how the approach to strategic planning should support the level of complexity of the organization. Westley, Patton, and Zimmerman (2006) defined organizational complexity by the processes in an organization that are basic, complicated, and complex. Basic and complicated processes tend to thrive in linear systems that demand precision, consistency, performance, and accountability. Complex tasks require a more flexible approach to allow for adaptation of processes to respond to emerging needs and do not typically follow standard operating procedures or linear processes. Using the above descriptions, the study findings suggest that describing or defining coherence is a relatively basic process. This likely explains why there was general consistency in describing it. The process for creating coherence is very complex, and this explains why there were inconsistencies and differing preferences and approaches. It is also possible that the definition of coherence is considered the formulation or thinking of coherence, separate from the implementation and acting to create coherence.

The research shows that school jurisdictions are “dynamic systems of adaptation and evolution that contain multiple parts which interact with one another and the environment” (Morel & Ramanujam, 1999, p. 278). They are not predictable because small changes in complex nonlinear systems can have a ripple effect, impacting the behaviour of the entire system (Anderson, 1999). There are also cautions about implementing strategic plans in complex systems. It is important to be aware of how the system responds during the implementation of a strategic plan because even small successive changes can result in larger cumulative effects (Hoffmann & Riley, 2002; Meadows & Wright, 2008).

Another distinction is that determining a process to create coherence will be challenging, even if there is a consistent understanding of the definition of coherence. As previously mentioned, the literature suggested two approaches to create coherence. The first is linear, where coherence is created mainly

from the strategic priority; in the second, coherence also emerges from observations and actions during the work of implementing the strategic vision.

Decision-making in strategic planning. As mentioned earlier, the original intention for strategic planning was for decision-making or formulation to be separated from implementation. This approach may work in a linear system where managers are not required to make decisions. However, this type of role may not exist very often. Mintzberg (1994) noted many challenges in strategic planning that impact decision-making. First, the predetermination is limited because one cannot predict the future. Second, the separation between thinking and acting poses a challenge because planning is decision-making. And third, decision-making cannot be viewed solely through an analytical lens because it involves synthesis.

In this study, the participants referred mostly to decision-making during the implementation of the strategic plan. This positioning is likely because they were speaking from their role perspectives and were describing how they created coherence within the strategic plan. It may also be described in the implementation because all participants felt the best way to achieve coherence was through the implementation of the strategic plan. This observation does not preclude the possibility that decision-making was viewed by the participants as being more fluid between thinking and acting.

The research on decision-making tends to focus on the factors that influence actors when making decisions. Understanding the research on decision-making may assist with the interpretation of how decision-making may or may not have influenced the priorities or approaches participants described for creating coherence.

Hanoch's (2002) research on decision-making highlighted three steps: search, decide to stop searching, and choose a path forward. They are described as follows:

- Searching all possible alternatives, understanding the necessary facts, and computing the

viability of each option.

- The stopping stage, where the decider finds a potential solution and they end the search.
- Making the decision. (Hanoch, 2002, p. 7)

If the decision to be made or the organizational context is more complex, the first stage of searching may take longer. The complexity of searching for alternatives is highlighted in the literature. Several significant factors might influence decision-making:

- how people saw the full range of possibilities before them,
- if they had perfect information,
- the understanding of distant parts of the system,
- knowing what others were planning,
- how this relates to recent and past experience,
- and how they reconcile the benefits in relation to their individual good, over the good of the system as a whole. (Meadows & Wright, 2008, p. 106)

Meadows and Wright (2008) also found that "people make quite reasonable decisions based on the information they have, but they don't have perfect information, especially about more distant parts of the system" (p. 106). It was evident in this study that the participants had different access to the knowledge of the workings of the organization, which may have influenced their decisions.

There are also factors in strategic planning, which might impact the second stage, stopping the search. The research indicates this stage can be impacted by balancing personal or work needs (Meadows & Wright, 2008), standard operating procedures (Herling, 2003), and the complexity of the decision-making process (Hanoch, 2002). As indicated in the first theme, there may be limits or conditions on decision-making that are influenced by the strategic planning process. Morecroft (1983)

noted that “processes that organizations use to make choices” (p. 399) are influenced by the organizational culture or structure.

Decision-making is critical to the implementation of the strategic plan, and it likely contributes to a disconnect between the conceptualization of coherence and the enactment of coherence. The above conditions that impact decision-making were highlighted by the participants in this study when they referred to finding ways to work differently for creating coherence through the implementation of the strategic plan.

Theme 3: Agreement With the Strategic Plan Does Not Create Coherence

This theme considers why having individual district leaders’ agreement with the strategic plan does not create coherence. Having a concerted focus on the strategic plan and support from senior leaders has been a foundational component perceived as critical in strategic planning. This study demonstrates that all participants understood, agreed with, and placed a high value on the strategic plan. They indicated that the strategic plan had a compelling priority; it was designed well and was sustainable because it maintained a consistent focus for five years. They indicated that the strategic plan drove everything and guided all work. Finally, they said the strategic plan was easy to use and helped employees know what the priorities were. The participants’ commitment to the strategic plan was impressive.

The value of having leadership agreement with the strategic plan is well documented in the literature. Fullan and Quinn (2016) reinforced the importance of the strategic priority by indicating that “successful systems have rallied around focused direction” (p. 45). Johnson and Chrispeels (2010) stated that a shared vision, and clarity around the vision, “provides the foundation on which to build school reform” (p. 770). The research literature tends to be consistent in reinforcing the importance of a clear strategic priority, as well as a commitment to the strategic priority, as essential for creating coherence

(Bonjour, 1998; Bryson et al., 2011; Childress et al., 2006; Darling-Hammond, 2005; Elmore, 2008; Fullan, 2000; Fullan & Quinn, 2016; Hightower, 2002; Johnson & Chrispeels, 2010; Kirkham, 1998). All of the frameworks and approaches to creating coherence, including the PELP (Childress et al., 2006), coherence framework (Fullan & Quinn, 2016), and Timperley's (2011b) approach, indicate a focus on strategic priorities (see Appendix G, Table G1 for a comparison of the frameworks).

No literature denies the importance of a concerted focus and a clear direction created by a strategic plan. However, this study shows the limits of strategic planning when the participants shared the variety of ways that leaders used to enact the strategic plan. It highlights the limits of having only agreement on the strategic plan. As mentioned in Theme 2, the participants also identified an important point of leverage for creating coherence was to ensure that leaders were actively engaged in the implementation of the strategic plan, which included a desire for the participants to work differently.

The research on strategic planning has attempted to address criticisms about effectiveness. Bryson et al. (2009), among the strongest supporters of strategic planning and the original proponents, have broadened components of strategic planning. They found in studies of strategic planning that some organizations have "essentially treated strategic planning as a routine, that is a fixed object, not a generative system comprised of many interacting and changeable parts" (Bryson et al., 2009, p. 175). One critical element added to the process is strategic management, which refers to the implementation of the strategic plan. Strategic management acknowledges that strategic planning is much more than a well-laid-out plan with a concerted and compelling strategic priority.

Bryson's (2010) definition of strategic management, as noted in Chapter 1, now refers to the "integration of strategic planning and implementation across an organization (or other entity) in an ongoing way to enhance the fulfillment of the mission, meeting of mandates, and sustained creation of public value" (p. 203). Further to this idea, the strategic planning process may be used as a way of

knowing and understood from a practice perspective (Bryson et al., 2009). One hope would be for organizations to "engage in strategic planning because they find it useful as a way of knowing what they should do, how they should do it, with whom, where, when, and why" (Bryson et al., 2009, p. 175), rather than just as a compliance requirement or to make their organizations legitimate. Bryson et al. (2009) did a study using actor-network theory and found this "methodology does illustrate the likely merits of studying strategic planning from an ANT [actor-network theory] perspective" (p. 201).

These actor-network theory additions to the strategic planning process acknowledge that strategic planning must follow an iterative, nonlinear process that allows for observations and actions from the day-to-day work to emerge and drive the formulation of the strategic plan, as suggested by Timperley (2011b) and Fullan and Quinn (2016). The question remains as to whether the divide between thinking and acting can be more effectively integrated and if strategic planning can break free from the foundational underpinnings that reinforce the challenges to coherence that are inherent in strategic planning, such as the strong focus on a strategic priority. Lissack and Roos (2001) suggested that "having a corporate vision is of limited use in today's complex business landscapes" (p. 53). Rather, if "you perceive your world as unstable and unpredictable, what matters is being coherent rather than being visionary" (Lissack & Roos, 2001, p. 53).

Refining the Definition of Coherence

The literature highlighted the binary distinction in strategic planning, which aligned with the two definitions of coherence in Finding 1. The first was a static description of the components of coherence. Coherence was defined as a clear strategic priority supported by a shared understanding and a common leadership approach to facilitate its development in the organizational structure. Second, coherence was further realized in this study to include a more dynamic view, considering the interaction and interdependence of the components within the organization.

The two definitions parallel the separation in the literature between formulation and implementation or thinking and action. Also, they parallel the separation between an analytical process of planning through deduction or reductionism to synthesis. Finally, they relate to the distinction between a linear process and a cyclical process. The literature helped explain why there might be a static description of coherence and a more dynamic description. The definitions also presented two perspectives on coherence: one considered coherence a product or end result, and the other considered it an action.

A final step in defining coherence in this study was to combine the two definitions. This moves beyond having a definition for formulation and a definition for implementation and distinguishes whether coherence is an action or a product or end result. The combined definition of coherence within an organization is an ongoing process of understanding that facilitates the conceptualization and enactment of coherence through shared understanding, alignment of purposes, and collective ownership. Coherence is a product, is the end result.

Revisiting Assumptions

At the onset of this study, I carried forward many assumptions that were influenced by my 30 years' experience as a teacher, school-based administrator, central office administrator, government employee, and most recently associate superintendent.

My first assumption was that retaining a state of coherence during the implementation of the strategic plan would lead to more effective implementation of the strategic plan. This assumption extended beyond the scope of this study.

My second assumption was that senior leader decision-making could facilitate or inhibit the establishment of coherence within the implementation of the strategic plan. My understanding related to

this assumption was challenged by realizing that senior educational leaders adopt a variety of approaches and different priorities regarding the enactment of work to create coherence.

The third assumption was that strategic planning processes could produce fundamental decisions and actions that can help shape, guide, and improve organizational outcomes. This assumption was challenged because I believe it was too narrow and did not consider the enactment of the plan to create coherence as being a critically important point of leverage. Participant perspectives indicate that coherence is created in a cyclical or iterative process that values coherence emerging from the work in the organization, rather than a more traditional view that strategic planning is a linear process that is created at the start and is put into action. This study also supports the view that coherence is built by leaders within and during the work (Fullan & Quinn, 2016), which is not an assumption I previously held.

I did not articulate an assumption on the relevance of the organizational structure to the creation of coherence. This study revealed that aligning with the organizational structure or changing the organizational structure to align with the strategic intention was a significant factor in creating coherence. The significance of the organizational structure was also articulated in the research. The need to change the organizational structure was less common in the literature, but very prominent within this study. Findings suggest that understanding, managing, and controlling the organizational structure may not be sufficient enough for leaders to work in a way that allows them to create coherence. Instead, the organizational structure may need to be changed.

Summary

The purpose of this chapter was to provide interpretative insights into the research findings. My attempt in interpretation and analysis was to build a more holistic understanding of how coherence occurs within strategic planning. The discussion and analysis offer a deeper understanding of the

disconnect between the conceptualization of coherence and the enactment of coherence, of why individual district leaders' agreement with the strategic plan does not create coherence, and why it is a myth that strategic plans create coherence.

Chapter 6: Conclusions and Recommendations

I hope the conclusions from this study are relevant and provide clarity about senior educational leaders' views of how coherence occurs during the implementation of a strategic plan. Additionally, I sought to understand how senior educational leaders were involved, directly and indirectly, in achieving coherency during the implementation of the jurisdiction's strategic plan. The insights gained from these leaders addresses a gap in the research literature. There was a pressing need to investigate and understand the perspectives of how senior educational leaders view and navigate the creation of coherence during the implementation of a strategic plan.

Conclusions

This study found that coherence within an organization is an ongoing process of understanding that facilitates the conceptualization of coherence and the enactment of coherence through shared understanding, alignment of purposes, and collective ownership. Creating coherence within strategic planning is a very complex process.

The first conclusion is that employing a consistent definition of coherence might be beneficial in understanding how coherence occurs within strategic planning. The definition might also assist with mitigating the challenge noted in this study: the disconnect between the conceptualization of coherence and its enactment. This conclusion reinforces the understanding that whether coherence is being created is a complex task. Based on the definition of coherence in strategic planning, a method to understand and assess it as an end result should be designed. In the absence of such a process, time and effort will continue to be invested in the creation of coherence that may fall short of the goal.

The second conclusion builds on the challenge of understanding coherence within the strategic plan. This study identified two surprising statements: first, there is a disconnect between the conceptualization of coherence and the enactment of coherence, and second, it is a myth that strategic

plans create coherence. Both of these statements were surprising because the participants were well intended and did exceptional work, yet the findings revealed the challenges with creating coherence. Also, it is often taken for granted that the mandated strategic planning process and plans create coherence. These two results represent how actions, initiatives, or outcomes created by the organization can radically conflict with the intentions of those actions (Simon, 1979). Meadows and Wright (2008) referred to them as beguiling events. Beguiling events fool stakeholders because they are not able to anticipate or expect the result. This conclusion reinforces that even if one is working diligently and believes that intentions are being achieved, sometimes one ends up with unintended results.

This conclusion builds on the previous one, acknowledging that building coherence through the creation and implementation of a strategic plan is a complex endeavour. The approach to creating coherence within the strategic plan may need to go beyond trying to improve or change strategic planning to make it more effective, as have been the intentions in the development of strategic planning. This conclusion suggests that it is necessary to design a process for coherence that also supports strategic improvement. The process would likely take a more holistic or systems view, rather than the strategic planning process that separates formulation and implementation or thinking and action. This approach is a departure from the current process, which focuses on using the existing process and trying to add the element of coherence.

Recommendations

The recommendations are based on the findings, analysis, interpretation, and conclusions. My recommendations are for senior educational leaders.

The first recommendation is based on the conclusion that coherence within an organization is an ongoing process of understanding that facilitates the conceptualization of coherence and the enactment of coherence through shared understanding, alignment of purposes, and collective ownership. Coherence

is a product, is the end result. I recommend senior educational leaders spend time to discuss and understand what this definition might look like in their organization, especially on an ongoing basis and as an end result. I also suggest that they think about what conditions might need to be in place to enable them to attend the strategic plan while at the same time attaining coherence.

My second recommendation is based on the last two conclusions. The second conclusion indicated that despite one's best intentions, results could be beguiling (Meadows & Wright, 2008), such as an initiative or an outcome created by the organization that radically conflicts with the intentions of the action (Simon, 1979). The third conclusion represents a beguiling result in this study, which found there is a disconnect between the conceptualization of coherence and the enactment of coherence, which identified it is a myth that strategic planning creates coherence. Based on these conclusions, the recommendation is for deputy ministers or senior government officials who reinforce the accountability requirement of strategic planning and senior educational leaders to come together and examine the effectiveness of the strategic planning process for creating coherence.

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Appendix A: Letter to the Chief Superintendent

Tim Stensland

Date: January 16, 2016

Chief Superintendent

Dear Mr. [Name],

As a University of Calgary doctoral student, I am writing you to make you aware that I have received approval to conduct research in the [School Jurisdiction]. During the time of my employment with the [School Jurisdiction], I was fortunate to be part of the Education Doctorate Cohort. When I agreed to join the [School Jurisdiction] cohort I committed to focusing my research on the [School Jurisdiction] as a way to potentially benefit the organization. The idea for the research topic was developed based on my work in human resources and leadership in the [School Jurisdiction].

The purpose of my research is to understand coherence during the implementation of the strategic plan in a large urban school jurisdiction. The jurisdiction is the unit of study with a specific focus on senior leaders who make decisions related to maintaining coherence.

The following are the key research questions:

How do the school jurisdiction's senior administrative decision makers define coherence?

How are those leaders involved, directly and indirectly, in achieving coherency during the implementation of the jurisdiction's strategic plan?

I am planning to interview six senior system leaders to gain their perspective on the topic. Potential participants will be employees in the role of director, associate superintendent, superintendent,

or deputy superintendent. the chief superintendent is not considered as a potential participant. The involvement of the participants will include two face-to-face interviews lasting approximately one and a half hours each, with an additional two hours of reflection time between interviews. The reflection time is a thought activity that does not require anything to be written down. Participants will also be asked to bring documents from a system and work perspective that pertain to the implementation of the strategic plan. The interviews will be held from January–April 2016.

I have proposed in the [School Jurisdiction] Application to Conduct Research that I would like the introductory letter and informed consent to be sent to potential employees through the Human Resources Department. I have enclosed a copy of the letter to the Superintendent of Human Resources. Employees who wish to participate in the research are asked to contact the researcher. The participants who choose to participate in the research will be kept confidential.

I would be pleased to meet with you if you have any questions regarding the research. I am also interested in meeting with you when the research is completed to share a summary.

Thank you in advance for your support of this research.

Sincerely,

Tim Stensland

Email: [email address]

Phone: [telephone number]

Appendix B: Participant Letter

Coherence in Implementing a Strategic Plan for Leadership Decision Making: A Case Study Tim Stensland

Dear [Potential Participant],

My name is Tim Stensland and I am writing to you as a University of Calgary doctoral student. I have been granted permission to conduct research within the [School Jurisdiction]. I am hopeful that you may find an interest in this study and be willing to participate. The following will outline what I would ask of you as a participant and provide more details about the study.

The purpose of my research is to understand coherence during the implementation of the strategic plan in a large urban school jurisdiction. The jurisdiction is the unit of study with a specific focus on senior leaders who make decisions related to maintaining coherence.

The following are the key research questions:

How do the school jurisdiction's senior administrative decision makers define coherence?

How are those leaders involved, directly and indirectly, in achieving coherency during the implementation of the jurisdiction's strategic plan?

To this end, I am interviewing several participants to gain their perspective on the topic. You have received this information because the Chief Superintendent or designate has deemed that you meet the criteria to be an eligible participant in this study. Eligible employees who receive this invitation and those who participate in the research will be kept strictly confidential, with only the researcher and the

researcher's advisor knowing who participated in the study. I know you are very busy in your role, but I am hoping that you will consider being involved. Your participation is voluntary.

Should you choose to participate, your involvement will include two face-to-face interviews lasting approximately one and a half hours each, with an estimated two hours of reflection time between interviews. There will be approximately 30 days between the interviews, and during this time participants will be asked to reflect on how your day-to-day work is related to the research. The reflection time will take about 30 minutes per week or two hours in total. The reflection is a thought activity that does not require anything to be written down. The total time commitment for participation in this study is expected to be five hours. Participants will also be asked to bring documents from a system and work perspective if they pertain to coherence in the implementation of the strategic plan. The interviews will be held from January–- April 2016. All interviews will be audio recorded to provide accurate records for analysis. Audio recording of the interviews is a requirement for participation in this research. All audio data will be encrypted and securely stored. Audio data and transcripts will be destroyed upon the successful defence of the doctoral dissertation, which will occur by June 30, 2017.

A document outlining the informed consent for research participants has been included with this introductory letter. Participants will be able to ask questions and sign the consent form at the first interview.

I appreciate your consideration of this invitation and ask that you respond to me via phone or email if you are willing to participate in this research. Should you have any questions regarding this request, please feel free to contact me.

Thank you in advance for your time and consideration.

Sincerely,
Tim Stensland

Email: [email address]

Phone: [telephone number]

Appendix C: Informed Consent For Research Participants

Researcher:

Tim Stensland, Doctoral Candidate, [email address]

Supervisor:

Dr. Sharon Friesen, Graduate Studies, Faculty of Education, [email address]

Title of Project: Understanding the Coherence in Implementing A Strategic Plan and the Relationship to Leadership Decision-Making: A Case Study

This consent form, a copy of which has been given to you, is only part of the process of informed consent. If you want more details about something mentioned here, or information not included here, you should feel free to ask. Please take the time to read this carefully and to understand any accompanying information.

The University of Calgary Conjoint Faculties Research Ethics Board has approved this research study.

Purpose of the Study

The purpose of my research is to understand coherence during the implementation of the strategic plan in a large urban school jurisdiction. The jurisdiction is the unit of study with a specific focus on senior leaders who make decisions related to maintaining coherence.

The following are the key research questions:

> How do school jurisdictions' senior administrative decision makers define coherence?
>
> How are those leaders involved, directly and indirectly, in achieving coherency during the implementation of the jurisdiction's strategic plan?

What Will I Be Asked To Do?

As a voluntary participant in this research, you will be asked to participate in two face-to-face individual interviews lasting approximately one and a half hours each. There will be approximately 30 days between the

interviews, and during this time you will be asked to reflect on how your day-to-to work is related to the research. The reflection time will take about 30 minutes per week or two hours in total. The reflection time is a thought activity that does not require anything to be written down. The total time commitment for participation in this study is expected to be five hours.

All interviews will be audio recorded to provide accurate records for future analysis. Audio recording of the interviews is a requirement for participation in this research. The interviews will be transcribed by a transcription service that will be vetted for privacy and security. All data will be encrypted, secured, and stored digitally. Audio data and transcripts will be destroyed upon the successful defence of the doctoral dissertation, which will occur by June 30, 2017.

Your participation is totally voluntary and you may refuse to participate in the entire study or any part of it. Should you choose to end your participation in this research study you may request that the data you have provided be withdrawn from the study.

What Type of Personal Information Will Be Collected?

Should you agree to participate in this study, you will be asked to provide your name, role, and contact information (phone number and email). Participants will not be identified by name or role, or work location in this study.

The audio recording of the interviews and interview transcripts will be kept secure by the researcher.

I grant permission to be audio recorded: Yes: ___ No: ___

Are there Risks or Benefits if I Participate?

There is no foreseeable risk or harm to the participant as a result of participating in this research study.

What Happens to the Information I Provide

Participation is completely voluntary. Information collected through the interview process that could identify a participant's work context or identity will be kept confidential. No one except the researcher, his supervisor and the professional transcription service will be allowed to hear any of the interview audio recordings or see the transcripts. Audio recordings of the interviews will be securely stored and destroyed upon the successful defence of the doctoral dissertation which will occur by June 30, 2017. Research study findings will be summarized and aggregated for any presentations or publications, including the relevant sections in the researcher's dissertation. Individual quotes may be used but will not be attributed to a named individual.

Signatures

Your signature on this form indicates that 1) you understand to your satisfaction the information provided to you about your participation in this research project, and 2) you agree to participate in the research project.

In no way does this waive your legal rights nor release the investigators, sponsors, or involved institutions from their legal and professional responsibilities. You are free to withdraw from this research project at any time. You should feel free to ask for clarification or new information throughout your participation.

Participant's Name: (please print) _____

Participant's Signature: _____ Date: _____

Participants email: _____ Phone number: _____

Researcher's Name: (please print) _____

Researcher's Signature: _____ Date: _____

Witness' Name: (please print) _____

Witness' Signature: _____ Date: _____

Appendix D: Semistructured Interview Questions for Interview A

Name of Participant:_____

Date of Interview: _____

Location: _____

Environmental context of the interview (noise, phones, traffic, etc...)

_____

The purpose of this research is to understand factors that relate to the implementation of the strategic plan. I will be asking questions about your specific work and work-related experiences that relate to the implementation of the [School Jurisdiction] Three-Year Education Plan (strategic plan).

1. Please describe your role.
2. Please explain how you determine the priorities for the leadership work in your department.
3. How do you view your role/work in relation to the three year plan and vision for the school jurisdiction?
4. How would you describe the connection of your work with the three year plan and vision for the [School Jurisdiction]?
5. How are you involved with and connected to making decisions that have an influence beyond your department?
6. How are you involved in implementing actions as a result of decisions that are made by others?

7. Based on your experience in the [School Jurisdiction], what actions, measures or other factors assist with establishing connections in the implementation of the three-year plan? (yellow take out)
8. Are there any actions, measures or other factors that might inhibit or get in the way of the ability in the implementation of the three-year plan?
9. How would you define or describe the connectedness or coherence in the implementation of the three-year plan at the [School Jurisdiction]?
10. Do you have examples or artifacts of coherence in the implementation of the three-year plan? Might be the same as the two questions below – decide which approach is better.
11. Can you think of an initiative or component of the three-year plan that exemplifies strong coherence, please explain. Look for what they identify as elements that represent coherence.
12. Can you think of a department or leader, which creates strong coherence with the three-year plan? If so, don't name them or it, but can you give me your thoughts on what contributes to the coherence?
13. Can you think of an initiative or component of the three-year plan that struggled with coherence, please explain.
14. What do you feel are important qualities or elements to consider when achieving or aspiring for connectedness or coherence in the implementation of the three-year plan?
15. What role does the leader play in attaining coherence in the implementation of the strategic plan?
16. Do you believe decision-making inhibits or prevents coherence in a school jurisdiction?
17. Based on your understanding of coherence, do you believe there are benefits? Explain

A follow up interview will take place in approximately a month. The follow up interview will focus specifically on defining or describing coherence in the implementation of the strategic plan at the [School Jurisdiction].

To prepare for interview B, I would appreciate if you could reflect on what we have discussed during this interview and jot down any further thoughts. As well, over the next month I would like you to record any insights or reflections based on your work context that might relate to this research. If you find documents that represent the work in the system or the work you do as it relates to coherence in strategic planning I encourage you to bring these to the next interview or email them directly to me. (Describe the protocol for public and private documents).

Appendix E: Semistructured Interview Questions for Interview B

Name of Participant: _____

Date of Interview: _____

Location: _____

Environmental context of the interview (noise, phones, traffic, etc...)

_____

The purpose of the second interview is to talk about reflections you may have had after we met for Interview A or observations from when we last met.

Questions:

Review the definition of coherence that will be used for this research: Coherence is a flexible state of connectedness that is maintained in a system, particularly during change. The connectedness includes important system linkages between the resources, structure, communication, relations, and culture of the system; as well as accounting for critical interdependencies in a system. Coherence in strategic planning should demonstrate that the strategies align with the corresponding goals to achieve the intended outcome. Connecting the why and how of the strategic plan goals and strategies to the linkages is critical. Attaining a state of coherence requires a balance between decision-making to make progress on goals in the strategic plan, as well as being aware of the impact of the changes to the system to make course corrections if necessary.

Talk about reflections based on the last interview.

Refer to questions in interview A if further prompting about coherence is required.

Appendix F: Areas of Consistency and Agreement

Table F1

Areas of Consistency and Agreement

Findings	Consistencies and agreement	Variations and inconsistencies
Finding 1: Coherence was defined as a clear strategic priority supported by a shared understanding and a common leadership approach to facilitate its development in the organizational structure	The strategic plan has a consistent and narrow focus; the strategic plan has a strong focus on student success; the work plan should focus on student success; the decisions in the organization focus on student success; strategic planning creates a focus on priorities; they have made progress in their ability and actions to focus on student success in the organization.	Coherence as a mindset or an ethos focus creates a focus on student success.
Finding 2: Coherence is created through the enactment of the strategic plan	Three common themes to create coherence; three common barriers that inhibit the creation of coherence; metaphors revealed that the structure of the system plays a critical role in attaining coherence; metaphor describes coherence is enacted.	No agreement on which theme is the most significant for creating coherence; no agreement on which barrier is the most significant in creating coherence; metaphors revealed the way coherence is enacted; metaphors describe a common mindset as an important component of coherence; metaphor highlights the importance of direction as a component to coherence; metaphor revealed that attaining a balance in the system creates coherence.
Finding 3: There was little consistency in the implementation and enactment of the strategic plan.		How participants enacted coherence; how participants viewed coherence in relation to their role; the priorities that the participants described for creating coherence; priorities represent competing areas of interest or contrasting approaches.

Appendix G: Framework Comparison

Table G1

Working Understanding of Coherence Compared to the Research Literature

Framework or approach	Strategic priority	Student success	Shared understanding	Leadership approach	Structure of the organization
PELP (Childress et al., 2006)	Strong focus instructional core	Yes, instructional core	Yes, instructional core	Yes, instructional core	Yes, linking, interdependencies
Coherence making framework (Fullan, 2016)	Yes, focusing direction/securing accountability	Yes, at the centre of the framework	Yes, deepening learning	Yes, leading for coherence	Yes, as part of collaborative cultures
Executive Leadership Program for Educators ExEL (Haslam, & Turnbull, 2011)	Yes	Yes	Yes, focus on developing leaders	Yes, develop through regular meetings	Not mentioned specifically
Johnson & Chrispeels (2010)	Yes, in relation to linkages	Yes, improve student learning	Yes, ideological linkage	Yes, ideological , relational, & communication linkages	Yes, linkages
Timperley (2011b)	Yes, overall focus of organization on student learning	Yes, student learning focus	Yes, build through professional learning	Yes, informed through professional learning	Yes, needs to support a student learning focus