

# The visioning process in a secondary school

Complexities and skepticism don't deter a principal from leading a secondary school through the visioning process ... a researcher, and vice-principal, explains the rationale and method.

by Rod Perrault

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To bring about change in a secondary school environment, the people responsible for making the changes need a clear sense of what they are trying to achieve – *a shared vision*. To be effective, the vision must bridge the gap between the future people perceive for themselves in their own personal and work lives and the larger school vision. The complexity of a secondary school environment makes the process of creating and managing vision particularly challenging. Though an in-depth consultative process is one way to develop a shared vision,

this may actually create an environment where motivation for change is inhibited as individuals' personal visions are stifled or lost in the process. Another way to create a shared vision is for a school's leader to make the connection between individual and school visions by acting as the steward of the vision. This is done through a process of dialogue and communication that acknowledges that the broader school vision needs to be responsive and connected to the personal visions of those within the school staff.

Ylimaki (2006) points out that

there have been two traditional views of how vision should be developed. The first reflects the idea that a leader creates his or her own image of the future for the school and is then responsible for ensuring that others within a school or a district fall in line with that image. The leader may or may not have communicated this vision but he or she would be responsible for directing resources toward the achievement of this vision. Aware or not of the vision, staff members would be expected to be compliant with the wishes or direction of the leader. The second traditional view of vision is that vision is reflected in the specific goals or targets that a school or district has set for itself and that those within the organization are expected to work toward attaining. Looking at vision strictly as measurable goals reflects an oversimplification of the complex operations of a school environment (Ylimaki, 2006). Both of these traditional models of vision do not take into ac-

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count people's fundamental need for ownership or connection to a vision and both minimize the potential for a strong investment in the creation of a better school. If a leader is the exclusive holder of a vision or if a vision is simply focussed on goal attainment, the potential exists to exclude people a leader may need in order to implement the vision. Traditional models of vision ask employees to be compliant to the ideas of a leader or of a small leadership group, and leave them operating at a low level of investment, performing their duties in a perfunctory manner with little or no connection to how their work leads to improving the school. Traditional views of vision are based on a belief that people lack their own vision and that they are unable to manage the forces of change faced by the school or organization (Smith, 2001). Looking at vision as a process that includes all of the members of a school community has the potential to draw strong commitment to the vision and, by extension, to improvement of the school (Senge, 1990; Senge et al., 2000; DuFour and Eaker, 1998).

Examining vision as something more than just a component of the actions of a single leader requires a broad definition of vision. Nanus (1992) offered a comprehensive definition of vision as a "realistic, credible, attractive future for your organization . . . [an] articulation of a destination toward which your organization should aim, a future that in important ways is better, more successful, or more desirable for your organization than is the pres-

ent" (p. 8). Holding a shared vision can inspire the members of a school community and provides a tool from which they can align their day-to-day actions.

In a discussion of shared vision it is important to clarify what vision is not. Vision is not a solution to a specific problem; however, a strong shared vision does provide a framework for dealing with problems (Senge, 1990). Additionally, shared vision is not a one paragraph statement that can be etched into a plaque. One of the risks of discussing vision in a school is that the term *vision* is often perceived as jargon and has been equated with time consuming processes that have often been divisive and have merely produced statements full of platitudes that carry little or no relevance to the functioning of an organization. DuFour and Eaker (1998) performed a review of mission statements of North American schools and identified common statements that had little guiding impact on the day-to-day actions of schools. The vision for a school needs to connect in a meaningful way to what people are prepared to invest. A 'cookbook' vision statement does not offer this (Senge, 1990, p. 212).

Having a shared vision in a school is important for several reasons. It sets a standard of excellence from which people can measure their work, and it can create a proactive (rather than reactive) orientation to the day-to-day activities of a school (DuFour & Eaker, 1998, Nanus, 1992). It is peoples' images of the future and the value they place on

those images that can motivate or stifle action. The cognitive processes that drive people's actions, including memory, perception and learning are determined by images of how the future will unfold and are a powerful "causal agent" to both individuals and organizations (Cooperrider, 2001). Additionally, Marzano, Waters, and McNulty (2005) identified developing a shared vision as a component of the creation of school culture as one of the most significant actions of school leadership that has an impact on student achievement.

To have meaning for people, the shared vision for a school needs to connect to their own personal visions. This is one of the key reasons why having a vision for an organization that follows a top-down model does little to gain commitment from people. Senge et al. (2000) identify two key disciplines that ready people for engagement in a school's visioning. The first of these is *personal mastery*. The development of personal mastery is a reflection of the awareness people have of their own assumptions and attitudes from which they form their understandings of the world. Senge et al. (2000) refer to these understandings as people's mental models which are the places from which people base their actions: "Our behaviour and our attitudes are shaped by the images, assumptions, and stories that we carry in our minds of ourselves, other people, institutions, and every aspect of the world" (Senge et al., 2000, p. 67). By encouraging exploration of their personal understanding and visions for themselves, leaders can connect people to a broader, shared vision. In traditional models, the perspectives and vision of individuals was not held as significant as the vision held by leaders offering people little connection to what

is meaningful in their own lives. To develop shared vision, people need to move from seeing their work at the school as something separate from the meaning that they assign to their world and move to seeing their work as a part of the larger purposes that they assign to their lives (Cooperrider, 2001). Senge (1990) points out that there are many benefits derived from encouraging people to understand and to develop their own visions. By doing so, people can find a stronger connection to the organization as they align their personal vision with the vision of the organization. As Senge (1990) stated, "If people don't have their own vision, all they can do is 'sign up' for someone else's" and, by doing so, avoid commitment to the vision they have "signed up" for. It is personal vision that provides the foundation for building a shared vision in an organization. Connecting to

people's individual visions and looking for and finding the commonalities in these personal visions are the foundations for building a broader, organizational vision. Senge (1990) describes a shared vision as "a vision that many people are truly committed to, because it reflects their own personal vision" (p. 206).

Moving beyond individuals' visions for themselves, developing a shared vision is a process of creating an understanding of the images of the future that are collectively held by the members of the school and then working with these images to create a vision of the future described by Nanus (1992). The challenge for a secondary school is to find a way to engage in a process that allows the membership of the school community to express their shared vision of the future, and then to align these potentially competing visions in a way that facilitates full

engagement from the school community.

The author of this paper discussed creating a shared vision with the principal of a large, rural secondary school in the province of British Columbia, Jane Jones (a pseudonym). As a principal who has been an administrator at all levels of school in BC (elementary, middle and secondary), she described how the complexity of a secondary school acts as a challenge to developing a shared vision. She described her experience of developing a shared vision at an elementary school as relatively easy and a natural part of the learning process. Elementary school staff members had strong collegial relationships and were interested in working together. In a middle school, developing a shared vision was relatively easy based on how the impetus of "survival to the end of the year encourages everyone

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to work together” (J. Jones, personal communication, October 29, 2010). However, Smith has found developing a shared vision in a secondary school a significant challenge. By virtue of the size of the school, staff dynamics were complex. At times, people as individuals or small groups were defensive, expressing a need to protect their autonomy, though, at other times, staff members were quite cooperative and willing to work with others toward common goals. As well, because of the demands of provincial exams and graduation program courses and by virtue of the secondary school structure, it was easier for teachers at the secondary school to be isolated in their practice relative to teachers at other levels. Many of the staff members had been in the school for quite a number of years and have, at times, shared their willingness to wait out a current administrator. Finally, because of the volume of events that occurred in the secondary school, there was no binding or central connection that held a focus for the whole school community. Com-

bined, these elements were reflective of the challenge of creating a shared vision in many secondary schools. As a way of breaking through these challenges, Jones has focussed on developing the culture of a learning organization within the secondary school and has used a process of consultation and dialogue to develop a shared vision within the school (J. Jones, personal communication, October 29, 2010).

Creation of and implementation of a vision is a key component of the development of a learning organization. As Senge indicated, “You cannot have a learning organization without shared vision. Without a pull toward some goal which people truly want to achieve, the forces in support of the *status quo* can be overwhelming” (1990, p. 209). There are two models for developing vision in a learning organization that are common in the literature. One is a formal process for developing and communicating vision that involves large-scale consultation that creates a formal vision document for a school and the other is a process similar to

the one described by Jones that unfolds through a process of dialogue with individuals and small groups that focuses on the dynamic nature of vision. Both approaches focus on the development of shared vision by moving away from a top-down or traditional approach toward a co-creating process by which the formal leadership and the members of the organization build a shared vision through a collaborative process (DuFour and Eaker, 1998, p. 65).

The formal process for developing vision involves gathering together various stakeholders to create a formal vision statement. In the process outlined by Senge et al. (2000), teachers, parents, students, support staff, community members and administration engage in a consultation process that is guided by the school’s leadership, formal or informal, to go through a deliberate process of addressing current problems, generating the ideas for an ideal future and developing an action plan for that future. DuFour and Eaker (1998) offer a similar detailed process of formal consultation. Both

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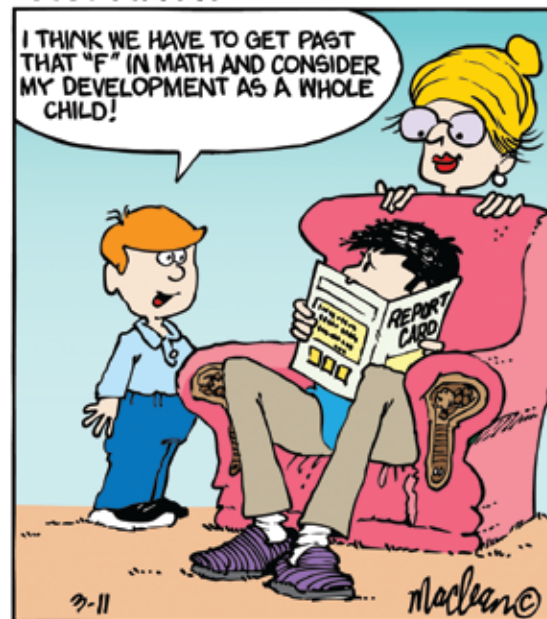
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### JUST KIDDING



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Senge et al. (2000) and DuFour and Eaker (1998) suggest that a vision statement should be generated from the process that offers codified direction for the school. DuFour and Eaker (1998) describe how the vision statement that is generated from this process needs to be much more substantial than a one-paragraph statement and should include specific ideals for many of the components of the school's operations. Within a formal process there is opportunity for nearly all stakeholders to be involved and to feel that they have made a contribution to the overall vision. Inherent in this process, however, is the requirement that people compromise on their personal visions and, by doing so, they may lose site of the connection between their own deeply-held images of the future and those expressed in the organization's generated vision statement. Ultimately, formal visions in this process are written by a committee who are attempting to consolidate large amounts of information. In this process, it is possible for people to feel that they have "discharged their visionary duties" and that their personal visions may have been ignored in search of a strategic or official vision and, therefore, feel little passion towards the vision (Senge, 1990, p. 212-3).

When asked about a formal process, Jones indicated that such a process was easily done at both the elementary and middle school levels. However, at the secondary school, she had taken a less formal but still effective approach to creating, communicating and implementing a shared vision (J. Jones, personal communication, October 29, 2010). In this approach, the leader acts as the steward of the shared vision. This is not at all the same as the

traditional model of a leader generating a vision and then communicating this vision — or not communicating this vision — throughout the organization; rather, the focus of this model is on developing shared vision through strong relationships, open dialogue and ongoing review and revision. Ylimaki (2006) describes this practice as being reflective of the visionary archetype. The archetypal visionary leader reflects a strong commitment to speaking the truth which the visionary leader discovers by listening without blame or judgement. By speaking this truth, the archetypal leader compels others to act on their vision and to use their creative strength by drawing them to the things that will help them to actualize their own visions. In a summary of Senge's *Fifth Discipline* (1990), Smith (2001) connects to this idea by describing how leaders are stewards of a vision when, through a process of dialogue, they gain insights into the complexities of their organizations and, by doing so, develop a relationship with their own personal visions and become committed to and responsible for an organizational vision that they do not own exclusively: "Leaders learn to see their vision as part of something larger ... and have to learn to listen to other people's vision and to change their own when necessary" (Smith, 2001). Jones talked about this as part of the process she undertook to develop understanding of the secondary school that she was moving in to. She met with each of the staff members of the secondary school to discuss both their experiences and their desires for what they wanted the school to become. By doing this, she dialogued with people to try to connect with their passions and values and their visions for what they desired the school to become.

Jones expresses how, after several years, the vision for the school has changed substantially as she has continued to formulate her vision and to align this with her experiences with the school's personnel. A large component of this process has been the ongoing dialogue that she has maintained with the staff of the school. Bennis (2009) describes this ongoing process of revising vision as something that leaders do as they "must be endlessly expressing, explaining, and, when necessary, revising" (p. 155).

As Jones demonstrates, to be a steward of a vision, a leader must have a strong awareness of the context that he/she is leading in. Marzano et al. (2005) describe this as "situational awareness" which is a deep understanding of the dynamics of the school environment. The key components to situational awareness for a leader are to understand the values present in the organization by examining how they are expressed through people's actions, knowing who the key stakeholders are in the organization, and determining the strengths and weaknesses of the organization (Nanus, 1992). A leader needs to be aware of the broad context that the school is operating in from a local, political level to having a broad understanding of global trends that are having or will have an impact on the operations of the school (Bennis, 2009; Nanus, 1992). Senge (1990) emphasizes that one of the key roles of a leader is to define reality which they can use to help people to gain a better understanding of the realities they are operating within. By helping people to be able to understand these broad truths, leaders are able to support others in defining and fulfilling their personal vision and in seeing where their vision fits within

the broader context of the school.


The process of meaningful dialogue as a tool for creating vision is an ongoing one. In this dialogue all participants must perceive they are able to be free to say what they need to about the direction of the school. The conversations include a dialogue about core beliefs (the reasons for being and “why are we here?” conversations), and a dialogue about the everyday experiences in the school. This honest exchange allows individuals to express their vision and to find commonalities and ways of blending key ideas together, thereby developing a shared vision which is a key component of developing a learning organization. Jones expressed how, since coming into the secondary school, she feels that she has both influenced and been influenced by others in the school. This has fostered in her and in others a desire to pursue best practices and to look carefully at the fundamental organization of the school. Fullan (2008) describes this as the “consistency-innovation dilemma.” That is, the challenge within the school to look carefully at what are best practices and also to encourage learning by constantly asking what can be done better. By engaging in this process with appreciation and respect for the work that teachers have done, Smith expressed that there has been more meaningful change than there would have been if she had taken a “stand and deliver” approach or formal consultative approach to developing an understanding of a shared vision. By engaging in this type of dialogue approach with staff members, a leader is able to draw out what Senge (1990) refers to as “pictures of the future” (p. 9). By engaging in this process, people are able to make direct connections between what is communicated as a

vision for the organization and their own personal vision. Senge (1990) describes how this process works:

No one can give another ‘his or her vision,’ nor even force him or her to develop a vision. However, there are positive actions that can be taken to create a climate that encourages personal vision. The most direct is for leaders who have a sense of vision to communicate that in such a way that others are encouraged to share their visions. This is the art of visionary leadership - how shared visions are built from personal visions.

Jones emphasized this in her interview when she described how the best way for her to communicate the vision for the school is to “live it by believing it to the core” and connecting her vision to the personal vision of others on staff” (J. Smith, personal communication, October 29, 2010). The process of dialogue is not limited to a formal leader-teacher communication. This type of dialogue occurs naturally among staff and needs to be nurtured to

provide people the opportunities to gain broad insights into the context of the school.

Vision is most significant when it becomes action in the school environment. It is through the process of dialogue and shared visioning that a school becomes a true learning organization. By exposing people to ideas through dialogue that connect to their own visions of the future it creates an environment where the reflective examination of individual and organizational actions can occur. Senge (1990) describes this when he states that “the hallmark of a learning organization is not lovely visions floating in space, but a relentless willingness to examine ‘what is’ in light of our vision” (p. 226). By connecting individual and organizational visions, people will be more prepared to invest in their own roles in the organization, to break out of their isolation and to make a meaningful contribution to the improvement of the secondary school. 

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## Cover story



Our cover art this month is a digital artwork, Jully Black Live 2010, by Thomas Nelles, who is a grade 10 student at Sullivan Heights Secondary in Surrey. This work is a permanent installation piece in the Newton Cultural Centre. Our thanks to Thomas, his teacher, Marc Pelech, and Sheila Morrisette, principal.