EXAMINING ORGANIZATIONAL CULTURE IN A SYSTEMIC BUSINESS-EDUCATION PARTNERSHIP

by

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A thesis submitted in conformity with the requirements for the degree of Doctor of Philosophy
Graduate Department of Curriculum, Teaching & Learning
Ontario Institute for Studies in Education
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ABSTRACT

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Over the past two decades, ‘Partnerships’ involving public education and business have proliferated across North America. While this phenomenon has become the subject of considerable examination, discussion and debate, there remains a significant gap in our understanding about organizational culture in these linkages. To address that gap, this dissertation has sought to determine how to study organizational culture in such a complex interorganizational relationship, and what characteristics and conceptions of organizational culture can be revealed through such an examination.

The locus of this five year investigation was The Toronto Learning Partnership (TLP), an interorganizational network connecting seventeen area school boards and hundreds of Canadian companies. The lived, inter-cultural experience of TLP participants was uncovered through extensive fieldwork and a variety of data-gathering techniques. Employing a ‘cultural relativist’ viewpoint, the particular nature of TLP was ethnographically represented in the form of a case study that sequentially chronicled its personalities, development and operation. In addition, through the application of a ‘cultural rationalist’ approach, observed and perceived cultural manifestations were juxtaposed in tables under fourteen categories of working life. By means of constant comparison within and between these two ‘modes of knowing’, grounded theory was developed to both describe and explain culture ‘of’ and ‘in’ this partnership.
The Learning Partnership proved to be a window through which six distinct conceptions of culture could be witnessed, including: the distinct and different organizational cultures of TLP, business and education; distinct and different organizational sub-cultures within TLP, business and education; the similar trans-organizational sub-culture of management across business and education; cultural ambiguity with respect to roles in TLP, business and education; and a cultural mosaic reflecting and explaining all of the aforementioned cultural forms.

This dissertation also discusses some implications of its cultural findings relative to the literature on organizational culture, to the act of research and to The Learning Partnership. The work represents a new means by which different organizational cultures can be studied, simultaneously.
"I thank you for your voices, thank you. Your most sweet voices"
William Shakespeare
Antony and Cleopatra,
II, iii, 179

for:
Mother & Jane

thanks to support and encouragement from:
Jan, Diana, Vera & Tricia

in appreciation of the generosity of:
the Management, Staff and Participants in
The Toronto Learning Partnership

and in recognition of the patience and wisdom of:
Dr. Joel Weiss
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CHAPTER 1: Introduction

... about the objectives, orientation and organization of this dissertation

I.1 OBJECTIVES OF THIS DISSERTATION

I.1.1 Research Rationale

As the links proliferate between education and business, so escalates the battle over what is gained - and lost - from forging these new relationships. The stakes are high because the intensifying debate over business involvement in education is a proxy for a much larger political struggle over what public education should look like in the 1990's and beyond. [Lewington, 1997]

Over the past decade, editorials pointing to the importance of 'Education-Business Partnerships' have become an increasing occurrence in education publications. But this quote was not taken from an educational journal. These observations of March 27, 1997, introduced a special section devoted to the subject by Canada's national business newspaper, the Globe & Mail. 'Partnerships' between business and education have become important news in both sectors, not just in Canada, but across the western world. The phenomenon has also merited attention in academic journals.

The literature on 'Education-Business Partnerships' produced primarily by those from the field of education, is rich in evaluative studies that reveal the benefits of these relationships and the factors that contribute to their perceived success. In addition, a number of polemics have been produced that focus on the intent and consequences of such affiliations. Throughout these works, differences between the organizational cultures of business and education are either noted as corollary findings, or assumed to exert an important influence in these inter-sector configurations. However, a partnership has not served as the locus for a cultural examination to date. Cultural explorations that have been undertaken in the field of education have enriched our understanding of numerous aspects of school 'climate', but little long term ethnographic research has been conducted to reveal a more holistic rendering of education's 'culture'.

1 In this dissertation partnerships will be referred to as: 'Education-Business Partnerships' in education contexts, and 'Business-Education Partnerships' in business contexts. When the context is neutral the alphabetical form is used.
In the business literature on ‘Interorganizational Relations (IORs)’, business-education partnerships represent a form of interorganizational linkage that has not been treated. While organizational culture has been referenced theoretically in many IOR studies, according to writers in the field our understanding about the social nature or these events is scant. And even in the literature that addresses organizational culture itself, organizational linkages have hardly been addressed.

I believe that an ethnographic investigation of organizational culture in the interorganizational context of a business-education partnership will contribute to knowledge in four important ways. It will serve to fill a current gap in our social understanding about a naturally bounded context that is proliferating through all of western society. It will allow us to see how traditional and current conceptions about organizational culture play out in this new context. It will inform both the collaboration process, and discussion and debate about education-business partnerships. And it will afford the opportunity to gain a deeper understanding about the culture of education.

1.2 ORIENTATION OF THIS DISSERTATION

1.2.1 Identifying The Field Of Study

This study deals with a focus (organizational culture), and a context (business-education partnerships) that will be of interest to readers from a number of disciplines within education and administrative studies. But it is an investigation that very much relates to the academic environment in which it was conducted - the Curriculum Studies Department in the Faculty of Education at the University of Toronto.

"Curriculum studies", according to William Schubert, "refers to an area of inquiry in higher education that focuses on what is learned and should be learned in educative institutions and to a lesser (but not less important) extent to what is and should be learned in noninstitutionalized educational situations." (1986:4). Featured among Schubert’s eight, “prominent subdivisions within curriculum study itself” is the domain of: "Curriculum Development". Schubert states that this area is concerned with, “the
process of deciding what to teach and learn, along with...considerations (historical, philosophical, cultural, political, psychological, and economic) that need to be taken into account in curriculum development” (1986: 41). This study attempts to shed light on a relationship that represents important historical, cultural, political and economic considerations for curricularists in public education. It also deals with an important issue in another domain: “Curriculum Change” (1986:42), by attempting to gain a deeper understanding about the powerful force with which any curriculum change must contend - the culture of education.

1.2.2 Identifying The Author

This boundary-spanning investigation was conducted by someone whose career reflects the same distinction. My background includes experience in both education and business. Following Toronto Teachers’ College, I spent five years as a public elementary school teacher. After moving to another province and finding that teaching jobs were scarce for those who were not locally trained, I took a job in marketing at a television station. Over the next twenty years I rose through the ranks into both staff and line management positions with a number of Canadian broadcasters and with the industry’s national and international marketing association.

Organizational linkages and organizational culture have interested me for some time. While investigating techniques to help station sales teams to increase local airtime revenues, I happened upon the concept of ‘co-operative advertising’ - promotions jointly undertaken by retailers with their manufacturers and/or other retailers. As a result, I spent a number of years training television station personnel from Canada, the US, Australia and the UK in how to generate and administrate these joint ventures. And later in my career, as a senior vice-president of sales, I became aware of the value of establishing station networks in building revenues and off-loading the skyrocketing costs of programming.

In my experience, both similarities and differences can be found between organizations in, ‘the way things are done around here’. The junior high, elementary, and special language schools at which I taught were all ‘schools’, but they proved to be very different school environments. When I moved from
the public to the private sector, I didn’t just change locations. It was necessary to follow a different dress code and adapt to new language, behaviors and thinking. While each of the hundreds of stations with whom I worked shared the same functions and technology, to me they all ‘felt’ different. But, the notion of ‘culture’ and the power it holds over an organization became abundantly clear to me when I joined a team charged to ‘turn around’ a number of financially troubled television stations. We found that changing an entrenched culture is a exceedingly difficult and painful task.

I believe that all researchers approach their work with a subjective understanding, and I am no exception. Absolute objectivity is a Platonic Form in the behavioral sciences. Various factors may have influenced, (some would say: ‘biased’), how I have conducted this study. I cannot see everything that has influenced who I am, nor measure the extent of the influence. All I can do is to try to openly recognize where I’m coming from, and be conscious of that in my research work. Twenty years spent working in business by day, and studying business to achieve a BAS, and MBA at night, is likely to have influenced the orientation I bring to this study. My experience in business relates only to a single type of business. And clearly my experience in education is out-of-date. I have attempted to address these influences by following where my informants have led me, and by clearly articulating that journey. The reader will find that great care has been exercised in triangulating the data. Multiple techniques and not observation alone have been employed, and only data that could be triangulated both within and across these techniques has been included. There is a strong reliance on the exact words of informants. Much care has been exercised in editing and generalizing. Although the nature of this study did not require it, inordinately careful attention was paid to establishing a representative sample of informants for interviewing. In addition, I have attempted to make the research process as transparent as possible, allowing the reader to see clearly what I have done and how I have done it. Consequently, this dissertation is lengthy. I have attempted to compensate for that by making the writing as accessible and interesting as I could. All I can promise the reader is that ‘this ain’t borin’ stuff’ about which anyone can be value neutral.

I am very concerned about the fact that readers will undoubtedly not be value neutral about the context of this examination. This study addresses culture in a business-education partnership. Culture involves beliefs and I have deliberately included statements by those informants who do not believe that
business and education should be formally engaged in partnerships. Whether these linkages should or should not occur is not a question that is addressed by this study. Personally, I do not subscribe to their prohibition, but I do believe we should remain vigilant to ensure that they are not merely marketing channels. My real dilemma is reflected in Diderot's words: "But who shall be the master? The writer or the reader?" (Diderot: 1796). The notion that a reader may misinterpret my intent, or use my data or words to underscore a position which I would not support, is profoundly disturbing to me.

1.2.3 Identifying The Approach To The Investigation

Three questions are addressed in this study:

1) How can organizational culture be studied in such a complex, interorganizational relationship?

2) What characteristics of organizational culture or cultures can be revealed through such an examination?

3) What theoretical and practical implications might be drawn from the cultural findings?

The 'Metro Toronto Learning Partnership', more recently titled: 'The Learning Partnership of Greater Toronto (TLP)' was selected as the locus for this cultural investigation. TLP is a not-for-profit interorganizational network connecting seventeen area school boards and hundreds of companies. Formed in 1993, TLP was constituted to initiate and coordinate bi-sectoral efforts targeted to improve four areas of concern established by the school boards: student retention, student readiness, student literacy and student participation in science and technology.

My approach to the cultural examination of TLP has been inductive, generative and constructive. It has concentrated on the lived, inter-cultural experience of a large number of the participants involved, uncovered through extensive fieldwork and a variety of data-gathering techniques. To capture the particular nature of TLP, context-dependent information was gathered and mounted into an ethnographic case study form. To allow for comparability and translatability, data that was context-related, but not context-dependent was collected and assembled into categorical form. By means of constant comparison within and between these two 'modes of knowing', grounded theory was achieved to explain culture 'of' and 'in' this complex empirical phenomenon.
1.2.4 Identifying The Timing Of The Investigation

The data and information presented in this dissertation reflects a particular period in time. After active data collection was suspended and during the time that this dissertation was being written the Ontario Government passed legislation that significantly changed the operation of school systems in the province. The reader should particularly note three of these changes. I have referred to school: ‘Boards’. This term has now been changed to: ‘Districts’. A number of ‘Boards’ referenced in this dissertation no longer exist due to government consolidations. And Principals and Vice Principals have now been removed from union membership.

I.3 ORGANIZATION OF THIS DISSERTATION

I.3 Chapters & Their Contents

The dissertation is presented in nine (9) distinctive chapters.

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• This first chapter serves to orient the reader to the dissertation. An argument is put forth to justify the study. The investigation, the research approach and the researcher are situated. And an explanation is provided describing how the dissertation will be presented.

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• The literature of four bodies of knowledge are reviewed in chapter two (2). First, a description of the historical development of partnerships is provided, together with a review of related literature. Since the literature on ‘Education - Business Partnerships’ is dominated by educators, a second review is provided under the title that business writers use to identify this phenomenon: ‘Interorganizational Relations’. The third review concerns conceptions and writings about ‘Organizational Culture’. And, because ‘Studies on
Organizational Culture in Education have received scant attention outside the field, a separate, fourth review has been added to feature this body of work.

**CHAPTER III: Methodology**

... to describe and explain culture in this IOR context

- In chapter three (3) the research methodology and rationale is described in detail.

**CHAPTER IV: The Context of Culture**

... a particular approach to the description of TLP

- Chapter four (4) is a case study that chronicles the development and operation of The Learning Partnership of Greater Toronto through three time periods. It is a ‘particular’ approach to the cultural interpretation of this interorganizational context.

**CHAPTER V: The Characteristics of Culture**

... a categorical approach to the description of TLP

- The fifth (5) chapter offers a ‘categorical’ approach to the interpretation of the context, discussing cultural manifestations of the sum and parts of the organization under fourteen categories of working life.

**CHAPTER VI: Conceptions of Culture**

... that interpret and explain this interorganizational network

- Conceptions of Culture are presented in section six (6). These are theoretical explanations of culture based on the particular and categorical interpretations presented in the two previous sections.

**CHAPTER VII: Learnings**

... about examining culture in a systemic business-education partnership

- Chapter seven (7) closes the dissertation with a discussion of what I have learned from the study.
Following the chapters is an appendix. Nine tables are located here, together with an introductory guide identifying their format and contents. These tables are a useful reference for Chapter five which was shaped on the basis of the data in these tables.

A bibliography is presented at the end, including references and other useful materials.

It is my hope
that the journey you are about to take
into the world of inter-cultural collaboration
will be as enjoyable
as mine has been.
II:0 INTRODUCTION

The topic of this dissertation bridges four, independent bodies of literature. The first two pertain to the type of context under investigation - the context as interpreted by the field of education, and the context as treated by administrative or business studies. In education, 'Partnership' is the recently adopted term used to denote a particular type of relationship between education and business. Under Education/Business Partnerships I have sketched the history of business involvement in North American public education; discussed how 'Partnerships' came about in the United States and Canada, respectively; and identified what investigations have revealed about the phenomena. In business, the notion of 'Partnership' is subsumed under the general rubric of: Inter-organizational Relations (IOR's). This second review includes information about IOR's and what about them has been investigated.

The third and fourth literature reviews deal with the focus of the examination - 'Organizational Culture'. Under the title: Organizational Culture the complicated nature of the subject is discussed in general. Following this is a separate review that highlights: Studies On Organizational Culture In Education. The section concludes with a summary of what has been learned from these reviews of the literature.

II:1 EDUCATION-BUSINESS PARTNERSHIPS

II.1.1 Origins

The notion that business should undertake a role in public education is not new, nor is it indigenously Canadian. Since the 19th century, when education across North America emerged from home and church to become a public institution, the business community has taken part in a variety of invited and uninvited roles: plant and equipment supplier, steward, advisor, consumer, curriculum supplier, patron, critic and lately, 'partner'. Educators have historically contracted businesses to supply
the plant, equipment and supplies necessary to house and support the concurrent instruction of large numbers of students. Through representation on school boards, many prominent, local business leaders accepted a stewardship role in educational affairs, offering advice on matters of curricula and administration (Kaulback & MacKay, 1993). With the advent of rapid industrialization in the late 19th century, business recognized its role as a consumer of public education, influencing schools to fit those raised in the agrarian culture with the attitudes and behaviors required of the industrial worker (George, 1972; Hersey & Blanchard, 1988).

Early in this century, US industry's need for occupation-ready workers spurred legislators to fund vocational education programs at public high schools (Rippey, 1984). These programs inserted business-designed curricula into the school day, and offered leave to students for on-the-job experience (Karier, Violas, & Spring, 1973). Brewin reports that between 1901 and 1911 in Canada there was: "organized agitation for a system of industrial education" (Brewin, 1967: 20). The Canadian Manufacturing Association, Boards of Trade, and noted industrial leaders lobbied government to provide industrial or technical education, arguing that Canada lacked qualified workers, and the Alien Labour Act frustrated efforts to recruit skilled labour from outside the country. In addition, these groups: "appealed to nationalism, stating that industrial education was necessary if Canada was to compete with other nations" (Brewin, 1967: 31). The resulting Industrial Education Act of 1911 followed the European model of creating separate institutions - "special, general and co-operative industrial schools which would train workmen and workwomen for specific industries" (Brewin, 1967: 4). The building and operation of these specialized secondary schools came under the control of Advisory Committees composed of six representatives from local Boards of Education, three local manufacturing employees, and three local employers. According to John Seath, the architect of vocational education in Canada, the creation of these technical high schools was not wholeheartedly endorsed. "There are some educationalists and others so imbued with the spirit of the old humanities that they can see no value in this training. Some, not without reason, dread the taint of commercialism and the impairment of our present system" (quoted in Semple, 1966: 144).
In the 1930s, in an attempt to realign an education system disarrayed by the depression, business management practices including those based on Frederick Taylor’s (1923) Scientific Management Theory became adopted in the organizational structure and operation of school systems across North America (Cronin, 1973).

Following the midpoint of the century, the launch of Sputnik by the Russians provoked among Americans a widespread critical self-examination of why they had failed where their political adversary had succeeded. During this examination, business leaders joined university professors and politicians in voicing strong concern about the quality of US public school education, particularly in the areas of math’s and sciences (Burt, 1970; Howe, 1983; Joyce, 1986). According to a New York Times article: “propelled by the panic-stricken Sputnik era... business executives... focused on education, equating the United States’ prospects for success in the technological race... with top notch schools” (Kreuzer, 1994:4).

Legislation and funding by government to improve public school curricula and teacher training was augmented by business investment in the development of specific, local improvement programs. Some of these business-funded programs sought to address the findings of a national study by Coleman (1966), which: “argued that variations in school achievement were accounted for predominantly by the socioeconomic status of students’ families” (Astuto, 1994:23). Dr. LaMar Miller, professor at New York University’s School of Education states that in New York City, for example, business sponsorship enabled the development of: “all kinds of cultural programs to make up for what kids’ didn’t have” (Kreuzer, 1994: 4).

During the 1960s and early 1970s, while American business involvement and investment in higher education rose, its activities in public education diminished significantly (Timpane, 1982; Otterbourg & Timpane, 1986;). During this period, Nasworthy explains: “the business community and public schools were often isolated from one another. Earlier corporate influence on local, state and national public-education policy had been reduced by the entry of new advocacy groups from local communities, federal and state programs, unions, and public interest agencies” (Nasworthy, 1988: 9). This trend was echoed in Canada, where an increase in involvement by teacher organizations, parent and community groups, and legal actions precipitated a change in educational policy direction. “The result of
the shift in direction of educational policy was that business people tended to remove themselves from the educational milieu. Fewer companies worked directly with the schools and fewer business people took the time to seek election to school boards...their interest shifted to the universities” (Barrett, 1994: 11).

II.1.2 Emergence In The US

During the 1980s a litany of critical reports provoked widespread public disapproval of the condition of American public schooling (Levine, 1983). In 1983, the Reagan White House released the results of a national investigation into public education, conducted by a prestigious committee under the direction of the Secretary of Education. That report: A Nation at Risk: The Imperatives for Educational Reform attributed consistently poor performance by American students on international tests, and a decline in average performance on domestic standardized tests, to a systematic weakness in school programs. “Our nation is at risk,” the report warned, “Our once unchallenged preeminence in commerce, industry, science and technological innovation is being overtaken by competitors throughout the world...if an unfriendly foreign power had attempted to impose on America the mediocre educational performance that exists today, we might well have viewed it as an act of war”. (National Commission on Excellence in Education, 1983). More rigorous standards and more traditional curricula were advocated for America’s public schools. Immediately, over half the states in the union initiated investigations of their school systems. There was widespread media coverage concerning this “crisis” in education. And an array of equally critical books and commission reports followed, including those from: Boyer (1983), Goodlad (1984), Passow (1984), Sizer (1984), Martin (1984), Spady & Marx (1984), the Taskforce on Education for Economic Growth (1983), and the Twentieth Century Fund Taskforce on Federal Elementary and Secondary Education Policy (1983).

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1 Some writers have challenged the attacks of the ‘80s which criticized the conduct and achievements of America’s public education systems. In their book: The Manufactured Crisis: Myths, Fraud and the Attack on America’s Public Schools, David Berliner and Bruce Biddle provide a meticulous examination of the evidence used to support criticisms of public schooling, which they characterize as “nasty lies” (xi). They conclude that: “some school bashing certainly seems to reflect the special interests of the critics themselves; friends or business interests of the critics, or the ideological, racial, ethnic, religious, or class interests that critics represent. Such possibilities should alert us all to read criticism of the public schools with a healthy dose of skepticism” (1995:152).
Two subsequent national reports and businesses themselves related this ‘crisis’ directly to the fortunes of the business sector. The Carnegie Foundation study, *Corporate Classrooms: The Learning Business* (Eurich, 1985), revealed a need for the US to strengthen its competitive position, and called for the institution of a national education policy, and the use of private sector education providers as the remedy. And the Hudson Institute Study, *Workforce 2000* (Johnston, 1987), pointed to an American workforce that bore all the characteristics of becoming obsolescent if the education system did not establish closer links with economic and technical realities. At the corporate level, Thompson notes that, “personnel directors and supervisors” were already: “aware of employees’ deficiencies in job training, job retention skills, and basic fundamentals, such as reading, writing and mathematics” (Thompson, 1991:29).

During this period, American business was wrestling with massive re-engineering efforts to refit for an information-driven economy based on technological revolution. These re-structuring efforts were being frustrated, not only by spiraling inflation, a recession, and increased international competition. “Additional remedial education services in the corporate setting were viewed as an unexpected and expensive burden” (Thompson, 1991:30). Business leaders began to publicly voice their criticisms. David Kearns, Chief Executive Officer of Xerox was one of many business leaders paying attention to these critical reports. “It hit me”, he stated, “that by the year 2000 we’d be out of qualified workers” (Kearns, 1991: 46). Kearns made speeches and penned articles, giving his opinion that: “the American workforce is in grave jeopardy - and so is our economic survival; American businesses will have to hire more than a million new service and production workers a year - who can’t read, write or count; three out of four major corporations already are giving new workers basic reading, writing, and arithmetic courses; while every year high schools across the country graduate 700,000 functionally illiterate young people - and another 700,000 drop out of school” (Kearns, 1986). John Akers, Chairman of IBM condemned the American drop-out rate and observed that while the cost of bringing each stateside employee up to technical proficiency ranged from $200 to $2,000, in Japanese plants it averaged $1 (Salser, 1991).

In addition to publicizing the problems, business leaders gathered under umbrella organizations to seek solutions and make recommendations. In 1988, Fortune Magazine inaugurated an annual
conference for educators and politicians to engage in discussions with executives from business. The Business Roundtable established a taskforce on educational issues. And the United States Chamber of Commerce advocated educational improvement through coalitions between business and schools in their Business-Education Action Plan (Campbell, 1984)

That business should take an active role in educational reform was encouraged by White House administrations throughout the '80s. President Gerald Ford called for a renewal of co-operation among government, education and the private sector (Gold, 1982). President Ronald Reagan challenged these sectors to work in 'partnership' to address the crisis reported in A Nation At Risk (Reagan, 1983). Reagan proclaimed the 1983/4 school year as: 'National Year of Partnerships in Education'. In order to: "foster greater private sector involvement in national, state, and local efforts to improve America's schools", the Office of Private Sector Initiatives (OPSI) was established in the US Department of Education (OPSI, n.d.:1). A 1984 OPSI survey revealed that over 46,000 business-education partnerships were occurring in more than 2000 school districts. In 1989, President George Bush called a summit meeting with the governors from every state to develop a coordinated approach to educational reform. Summit calls from Presidents had been made only twice in over two hundred years. Agreement was reached to establish education performance goals by 1990, that Bush emphasized should be "national" and not "federal". White House officials and representatives from the National Governors' Association received proposals on what the goals should be from education, labor and business leaders. In February of 1990, consensus was reached to improve schools through the achievement of six national goals and 21 related objectives. Bush's statement of these goals in his 1990 State of the Union Address omitted two goals that had appeared on previous drafts. "Reference to 'the level of training to guarantee a competitive work force' (and) 'the supply of qualified teachers and up-to-date technology'...are missing" (Government of Canada, December 1990:17). At the summit, it was recognized that education was under the jurisdiction of the states, not the federal government. Washington chose to stay within its mandate. Bush used the authority of his position as President to champion the issue of reform. Congress increased funds for 'pre-school' programs, educational grants, scholarships and merit awards, and offered the states greater flexibility in their use of federal funding. However, it was up to the states to: "continue to bear the burden of school
costs" (Government of Canada, December 1990:16). The states were already hard-pressed to generate the financial resources required to engage in the significant education restructuring and reform that would be required to achieve the goals mentioned by Bush. The two goals he omitted were, among other problems, too expensive.

During this period North America was still in the grip of a recession and industrial re-orientation which had contributed to a sharp rise in unemployment, particularly among middle managers outplaced due to corporate downsizing. Consequently, motivating the support for additional taxes and bond levies to support public school improvement was difficult, if not impossible (Bennett, 1986). For many parents who remained among the affluent, public education was no longer relevant. In response to a system that they perceived no longer met their needs, significant numbers had already voted with their feet by removing their children to private institutions (Timpane, 1982).

Stateside politicians and educators quickly realized that the business sector had the resources to assist in educational reform, and a purpose, beyond philanthropy, to become involved. The Committee of Economic Development (1985) billed such involvement as: "enlightened self interest" - not a donation, but an investment with a 'quid pro quo'. According to Shanker (1984) diminished numbers of educated employees, increases in undereducated minority workers, and elevated numbers of non-English speaking immigrants had contributed to significant and rising personnel training requirements. By 1990 US corporations were spending an estimated $210 Billion on employee re-training, an amount that exceeded by $30 Billion the combined budgets of all American primary, secondary and post secondary institutions (Barrett, undated: 3). Among businesses therefore, there was an imperative need to support the development of a more qualified workforce. Recognizing that corporate training could not substitute for public education, investment and involvement in public education reform could be rationalized as 'good' for business (Timpane, 1984). Among some companies, such involvement proved good for 'business'. Gerald Levin, Chairman and CEO of Time Warner Inc. admitted that for the book industry: "ways to foster literacy...make practical sense for our business" (quoted in Kranberg, 1993). As Marshall Loeb, Managing Editor of Fortune Magazine pointed out in 1990: "Corporations are uniquely qualified to help,
with good reasons to lead in the struggle for reform. Their workers are too often the schools’ failures. Business also has the money, management skills and political influence to effect change” (Loeb, 1990:4).

And so, beginning in the early 1980s, doors from the White House to the state house to the school house opened, and business was invited back in, not as patrons, but as ‘partners’ in what Hlebowith (1988) called: “a national movement” for educational reform. By 1989\(^2\), 141,000 partnerships involving business were recorded (Heavyside & Farris, 1989).

II.1.3 Emergence In Canada With A Focus On Ontario

During the 1980s, Canadians were exposed to this collaborative re-engagement of American business and public education through transborder media, professional journals and stateside industry conferences. And Canadian education systems had come under similar performance criticism by business and the media at home. However, the partnership movement did not immediately materialize. Barrett (1994) suggests that early partnership efforts following the US ‘Adopt-A-School’ model\(^3\), which he characterizes as: “organized begging”, met with little success for four reasons. Most Canadian corporations were subsidiaries of firms headquartered in the US or elsewhere, and “their educational commitment tend(ed) to be geared to their home country” (Barrett, 1994:17). Over the previous decade Canadian education systems had little involvement with the corporate sector. The Canadian economy was locked in a major recessionary period in the early ‘80s and business and industry were investing in major

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\(^2\) The US Department of Education, when contacted for more recent figures indicated that the collection of partnership data by OPSI was not continued in the 1990’s. The National Association for Partners in Education states that their numbers represent an estimate of partnerships undertaken only by their members and will not reflect national figures. According to the Conference Board of Canada, while numbers of partnerships have been recorded by some individual Boards, no national or provincial attempt has yet been made to estimate the number of partnerships in Canada. Industry Canada states that it is currently attempting to establish a means to identify the extent of these activities, but that no data collection has been undertaken to date.

\(^3\) In fact, the “Adopt-a-School” model in which business involvement is limited to funding or equipment donation has also met with criticism in the US. Kolderie (1987) claimed that these practices are potentially harmful to schools since they can create dependence as opposed to empowerment that would be better served if business provided incentives, opportunities and consequences. Kearns (1988), Doyle (1987), the Committee of Economic Development (1985) and Timpane & McNeill (1991) agreed that it was unlikely that continual infusions of business benevolence would appreciably improve the quality of the entry level workforce.
re-engineering efforts. Consequently, business resources to invest in education were limited. The number of school boards and schools seeking support from business was small. Among the majority of school systems there was little “perceived need” for business involvement.

Canadian education systems were not experiencing the serious funding shortfalls reported among some of their American counterparts. This can be attributed to a fundamental difference between the countries in the nature of the public education revenue base. In the early 1990s, unlike the US where only 16% of municipal property taxes were paid by businesses, in the Province of Ontario, for example, the figure was 47%, rising to 57% in metropolises such as Toronto (Lowden, 1994:4). To arrive at these levels, mill-rate increases had been passed by elected officials with little political fall-out. Businesses don’t vote. In addition, Ontario school boards whose municipal tax base is insufficient to completely fund the operations have historically received grants from the Provincial government. Approximately 38% of total Ontario expenditures for elementary and secondary education in the early ‘90s were provided by the Province with the balance raised locally through property taxes (Peters, 1994:10). As a result, in a country whose per capita spending on education was only exceeded by Sweden, the school system in Ontario was: “one of the highest funded in the world” (Cadieux, 1992:4).

However, Canada’s public schools were not sheltered from mounting performance criticisms that reflected profound discontent. Canadian firms were facing the same technologically-driven imperative for more highly skilled human capital. However, in their search for a domestic supply of highly skilled workers, both outside and inside their organizations, corporate Canada came up short. During the 1980s it was reported that while as many as 700,000 jobs were available, and over a million were unemployed, people with professional, technical, scientific and trade qualifications proved exceedingly difficult to find (Litchfield, 1991:60). And, according to a Woods Gordon study, significant numbers of employees demonstrated literacy deficiencies that not only frustrated re-training efforts, but contributed to productivity and accident losses estimated at $4.2 Billion, annually (Litchfield, 1991:60).

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4 The education funding practices illustrated for Ontario apply to most Canadian provinces with three exceptions. In New Brunswick and Prince Edward Island, provincial governments levy their own property taxes to fund public education. And Quebec relies on revenue sources other than property taxes for this purpose.
In the 1989 World Competitiveness Report, Canada's education system was ranked 24th out of 44 in its ability to meet the needs of a competitive economy (E.M.F., 1989). That same year, the nation's leader, then Conservative Prime Minister Brian Mulroney publicly voiced the need to improve standards in public education. According to the editor of the Financial Post: “The PM referred to failings in fundamental aspects of education. About 17% of Canadian high school graduates are functionally illiterate; mathematical shortcomings are even more glaring. Thirty percent of Canadian students drop out before the end of grade 12” (Godfrey, 1989:10). But the Provinces to whom this message was directed did not rally to the call, as had their stateside equivalents. Godfrey reported that: “(The Prime Minister) is well aware that education is a provincial responsibility under the constitution; nonetheless he was reminded of that fact by some provincial spokesmen who seemed more concerned about protecting their turf than in addressing the problem” (Godfrey, 1989:10). Undaunted, the federal government pursued the matter, arguing that: “the federal government already spends $11 Billion a year in education transfers to the provinces. That gives us a responsibility, as well as a role in education”(Cadieux, 1992: 6). Federal efforts in the forms of research, policy statements and initiatives followed.

In 1990, the Office of Canada's Secretary of State released a report that profiled recent reforms in education and training systems undertaken by eight OECD nations: the US, Australia, The Federal Republic of Germany, France, the United Kingdom, Sweden, New Zealand and Japan (Government of Canada, December 1990). This document was widely circulated with the stated intention that: “this review of the process and content of educational reform will help to inform any Canadian initiatives that might be considered in this field” (Government of Canada, December 1990: 3). Among common features noted in the reforms instituted by these eight nations - cited as “Canada's competitors” (Government of Canada, December 1990: 8), the report noted: “clear statements of national goals and objectives”, and “without exception closer links between education and the economy” (Government of Canada, December 1990: 5). It was observed however, that: “formally addressing a theme in a goal or policy statement at the national level in each of the eight nations does not necessarily mean that educational authorities have been willing or able to implement the reform at the state or local level” (Government of Canada, December 1990: 9).
In the 1991 Speech from the Throne, Ottawa announced three national goals to: "promote a learning culture in this decade". These were: to reduce adult illiteracy by half by the year 2000; to achieve a 90% high school graduation rate or equivalency; and to double the number of science and engineering graduates (Cadieux, 1992: 6). To address these goals, the federal government did not directly interfere in the provinces’ constitutional jurisdiction, but it did appeal to the Canadian public to demand educational reform. After meetings with provincial governments and interviews with 60 representatives from business, labour, academic and social action groups, the federal government instituted public consultations across the country. These consultations were focused around: "a number of pointed questions on how we should address the problem" (Government of Canada, 1990). Shortly thereafter, in Ontario, the Royal Commission on Learning was constituted to examine and receive public input on elementary and secondary school programs, teacher education, accountability in education and the organization of the school system. And in 1992, Ottawa launched a nation-wide $300M, 5 year ‘Stay-In-School’ promotional initiative (Cadieux, 1992).

Mulroney’s 1989 message and subsequent federal undertakings did find a receptive audience in the business sector. Leaders from corporate Canada and influential business groups such as the Conference Board of Canada and the Business Council on National Issues expressed the need for private and public sector organizations to work together so that Canada could effectively compete in a global economy. Partnerships with education: "begin(ning) at the elementary school level" were required, so that current and future Canadian workers developed: “the ability to absorb, process and apply new information quickly and effectively" (Conference Board of Canada, 1991:5).

Bill Etherington, President and CEO of IBM Canada noted that: "an information-based society...gives a whole new meaning to what learning is all about" (Etherington, 1994:18). That new meaning was captured, for him, in a “dramatic statement” by 93 year old Dr. Joseph Duran. Duran had co-founded, with Dr. Edward Deming, the quality culture in Japan, and was invited to speak to IBM Canada employees about quality issues. Etherington recalls that: “somebody asked (Duran) how we can keep a focus on quality with our work-force when there is so much turmoil? Where can our employees find stability?” (Etherington, 1994:18). Duran replied that in our once agricultural society, a man’s
stability was his land. With the coming of the industrial revolution, a man found stability from his profession or the company he worked for. But in today's information-driven society, even the most highly-skilled professional can be rendered obsolescent and replaced by technological innovation. Therefore:

“your only source of stability and assuredness of future lifestyle is your ability to adapt and to learn” (Etherington, 1994:18). Like Etherington, Robert Ferchat, President of Northern Telecom, concluded that: “education is everybody’s business. We cannot afford to have it boxed up in one level of government, one ministry, one school board, one classroom. It is up to each of us, as leaders, to put that principle to work” (quoted in Godfrey, 1989:10). Other leaders from Corporate Canada joined Etherington and Ferchat in speeches promoting the importance of education, and criticizing systems that were: “still schooling for the smokestack economy” (Nixon & Ignatieff, 1994).

During the latter half of the 1980s, Canada’s first partnerships involving school boards and businesses began to be forged in areas where corporate headquarters are concentrated. In Calgary, the hub of Canada’s oil and gas industry, anticipating dramatic cuts in education budgets, the Calgary Board approached a number of major corporations to fund and participate in a variety of school-based initiatives. News of Calgary’s success in generating reciprocal involvement - bringing business into education, and educators and students into business, traveled east. Taking on the role to assist corporations to: “develop strategies for support of public education in Canada” (Conference Board, 1991:9) the Conference Board of Canada - “the leading private applied research institution dedicated to enhancing the performance of Canadian organizations”, showcased Calgary’s efforts in a business-education conference.

In Ontario, Chambers of Commerce in several communities established ‘industry-education councils’ to promote business involvement in schools. Directors of Education in two Toronto area school boards launched significant partnership initiatives. In East York, the Director established his own industry-education council, and personally recruited the support of Spar Aerospace, Unisys, the University of Toronto and NASA to re-equip, re-focus, and revitalize a secondary school that had been closed due to dwindling enrollment. The Director of the North York Board (NYB) sent a team to investigate partnerships in the US, and hired Mandy Thompson, an MBA with experience in business/government relations and education, to build partnerships for the Board. Funding support for this NYB initiative was
provided by a federal government 'innovation' grant, payable to an arms length partnership foundation

NYB had established with Industry-Education Councils in two other Ontario cities - Hamilton and

Kingston. Thompson was asked to share her partnership development expertise with numerous Boards in

Ontario. Through her influence and with the patronage of Bell Northern, regular telephone conference
calls were established so that educators across Canada could network on partnership issues and ideas.

Thompson attributes the change in partnership development - from gradual involvement in the late ‘80’s to widespread adoption in the 90s, to the emergence of: “an economic argument for it”.

Although: “when I first got involved in partnerships it was a pretty rough sell”, Thompson found that recruiting companies became easier with the ‘90’s recognition by businesses that partnerships were “a

strategic issue”. “If Canada...wanted to compete on an international scale, our education system had to be

the very best...and so, for businesses, it made sense to have them involved to see if they could make a

contribution to create a stronger education system”.

In education, according to Thompson, interest in developing closer links with the business sector

was spurred in the nineties by two issues - the need to re-establish curriculum relevance, and the advent of

budget cutbacks. Thompson observes that, “the type of learner we are dealing with is different than when we went through. We were willing to sit there and do it because it was given to us. These kids are getting

out a lot sooner if it’s not relevant”. Although she cautions that: “ we aren’t just educating for the

workforce”, Thompson believes that, “the economy has redesigned itself... the workplace has changed

completely and so the application of what we’re teaching has to be considered and changed and

readjusted”. Establishing closer links with business would assist in that realignment. Thompson also

pointed out that during the 90’s in metro Toronto, the “local tax base has shrunk incredibly...by a hundred

million a year”. Applications by Metro Trustees for provincial assistance to cover the shortfall were

denied. Moreover Ontario’s newly elected conservative government announced that it would be making

significant cuts to its education budget.

Under the relatively stable budget conditions of the ‘80s, partnership development activities

emerged gradually and selectively. The attitude that there was little “perceived need” for business

involvement in public education, prevailed. In comparison, during the ensuing period of shrinking
education budgets, partnership activities proliferated widely. And the attitude that there was little "perceived need" for business involvement in education was selectively maintained by a diminishing number of educators, particularly, according to partnership developers Thompson and Barrett, among those with strong union ties. Clearly, as Canadian political, social and, subsequently, economic forces moved into alignment with those of its dominant southern neighbour, the climate became ripe for Corporate Canada's re-engagement in public education through the US inspired phenomenon called 'Partnerships'.

II.1.4 Descriptions In Principle

In the field of education, the term: 'partnership' has long served as a descriptor for many relationships, including those between: classrooms and libraries, schools and community groups, school boards and social service agencies, pre-university and university institutions. During the late 1980's explanations of the term advanced by educators began to position 'business' first among alternative sources for such relationships. For example, a 'partnership' is defined by one Toronto school board as: "a mutually supportive arrangement between a school or school board and a large or small local business, post-secondary institution, government department or community agency" (Barrett, 1994: 2). It is interesting to note that by the mid 1990's, in school board literature and common usage, the term: 'partnership' is usually unqualified. It is taken-for-granted to mean: 'partnership with business'.

In the business sector, the term 'partnership' has traditionally described an entity, not incorporated as a limited company, which combines the resources of two or more people (Rosen, 1986:40). In a 1993 issue of Canadian Business, George Khoury distinguished a different type of partnership involving business - "a relationship involving two or more organizations that have agreed to work cooperatively with the common goal of addressing a human or community issue or set of issues" (Khoury, 1993:26). In its definition of partnerships pertinent to the 'community issue' of education, the Conference Board of Canada defined such engagements as:

"mutually beneficial relationships between employers and educators that are designed to enhance learning for students and other learners. They may involve other education stakeholders as partners, including students, employees, parents, communities, labor and government organizations. Most business-education
partnerships are co-operative relationships in which partners share values, objectives, roles and responsibilities, and human, material or financial resources in order to enhance the quality and relevance of education and training” (Bloom, 1997:2).

Among researchers on the subject of education/business partnerships, there is no definitional consensus (Sirotnik & Goodlad, 1988). Moreover, Pautler (1989) argues that the terms: “collaboration” or “involvement” more aptly describe this phenomenon, since ‘partnership’ implies an ownership connotation that, he contends, does not apply.

Whatever the appellation, Goodlad (1985) observes that such arrangements display three characteristics: they involve dissimilar members with a need for mutual dependence; they focus on goals which satisfy mutual self-interests; and they promote the self-interest of no member at the expense of another. While such criteria serve to describe ‘partnership’ in any form, to appreciate the specific and particular nature of partnerships involving education and business requires an examination of their descriptions in practice.

11.1.5 Descriptions In Practice

In practice, there is wide variety in the types of activities undertaken by educators and business people in partnership. Writers on the subject have categorized these activities based on a number of different criteria. Burt (1970) categorized partnerships on the basis of the type of activities undertaken by business in schools including: instructional program improvement, work-study program participation and curriculum revision, job placement and career information, teachers’ professional growth and students’ incentive programs, administrative support services’, public relations promotions, and shared facilities materials and finances.

O’Connell (1985) delineated partnerships on the basis of the extent of business involvement, including: one business with one school, many businesses with numerous schools in a district, business’s donation of funds or materials for specific school projects, or wide distribution of business-designed curriculum programs.
Barrett (1994) distinguished partnerships on the basis of the educational level to which business support is directed. "Classroom support" involves the provision of lecturers, tutors, and mentors, career-specific materials, equipment, sponsoring of activities such as field trips, and teacher professional development. Also included in this classification are training activities provided by educators to business employees. "School support" may take the form of scholarships, awards, and other funding for special activities, providing co-operative education placements for students, equipment donations, career, profession or operation instruction either at the school or business site. "Board support" includes the development of publications, public information campaigns, technical and equipment assistance, and large scale arrangements for co-op placements and staff internships.

Segal (1992) identified four types of partnership activities based on the objective of the arrangement. In “Adopt-a-school” initiatives, businesses provide monetary, human, and material resources to compensate for shortfalls in public funding. "Project-driven" partnerships involve staff training aimed at school or program change. In the “Reform-oriented” approach large corporations and school districts engage to address systemic change. And corporations engaged in “Policy-change” target their involvement at the legislative reform of education. Segal’s categorization bears a strong resemblance to the partnership participation levels described by the Committee for Economic Development in their 1985 publication: Investing in Our Children, which were further refined in 1991 by Timpane and McNeill into the categories: “helping hands relationships”, “programmatic initiatives”, “compacts and collaborative efforts” and “policy change efforts”.

Based on their survey of 92 corporate partnerships in 50 cities across the US, Levine and Trachtman (1988) reported on types of activities at three levels of frequency. The largest percentage of business respondents were involved in advisory, speaking, scholarship, and field trip funding activities and in encouraging employees to serve on school boards. A smaller percentage were involved in: Junior Achievement programs, work placements for students, curriculum development materials and assistance, monetary gifts, equipment donations, student mentoring/tutoring, and staff development. And the smallest percentage participated in: grant sponsorship, student and teacher summer programs and awards.
employee volunteering, assistance to math/science and engineering programs, developing course materials and management programs for board administrators.

These, and other catalogues of partnership activities give rise to seven general observations about the nature of this relationship between business and education:

- Such arrangements are not geographically restricted in North America, although it can be seen that more of these initiatives appear in urban communities than in rural locations (Gardner, 1990).

- Business’s engagement touches all levels in the education hierarchy. Contact can be seen to have been initiated with students, teachers, employed or elected administrators; from schools, boards, local, regional or federal governments.

- The number of participants vary from single party engagements involving one participant from each sector, to multiple party engagements involving groups from either or both sectors.

- The duration of these activities ranges from a few minutes to a few years.

- There is a predominant flow of resources from business to education.

- The resources exchanged involve tangible funds, goods and services; and those that are intangible, such as information and attitudes.

- All education-business partnerships claim that their initiatives seek to improve the quality of education.

**II.1.6 Assessments**

Most investigations into education-business partnerships have concentrated on evaluation studies as opposed to purely scientific research. According to Kiresuk, Larsen, and Lund (1981:199): “Evaluation is distinguished from purely scientific research by a focus on the usefulness of results”. Evaluative studies on partnerships appear to occupy two practical categories: those that describe and analyze partnerships in order to illustrate what benefits these engagements have accrued; and those targeted to illuminate factors that contributed to successful collaborations.

The benefits of partnership interactions have been chronicled:

- for numerous stakeholder groups (Deverger, 1984);
- for the community-at-large (Benka, 1974; Deverger, 1984; Bennett, 1986);
- for the business sector (McKenzie, 1983; Deverger, 1984, Burt, 1970);
- for the education sector (Gallin, 1988; Burt 1970);
- for teachers (Stodghill, 1982; Trachtman, 1985; Bennett, 1986);
- and for students (Southworth, 1988).
Some examples of tangible dividends cited to have been gained from partnerships include:

- the realization of greater financial, material and human resources;
- practical support and enrichment to curricula;
- increased information, concern and dialogue about careers and their academic requirements;
- increases in initiatives to promote safe, disciplined and drug free school environments;
- measurable improvements in academic performance and behaviours;
- official individual recognition;
- reductions in on-the-job training time; and
- tax benefits.

Intangible benefits arising out of partnerships have also been identified, including:

- increased trust, credibility, understanding and cooperation between sectors;
- increased self image;
- improved morale and professional growth;
- a heightened awareness of employee cultural diversity and the need for measures to promote equity;
- added humanistic concern to the traditional financial focus; and
- enhanced individual and sectoral public image.

While numerous publications issued throughout the '80s and '90s claim benefits that are attributed to partnerships, the majority of these descriptions do not include explanations of evaluative procedures so that the validity and extent of these claims can be established. Among academic studies providing research documentation, it is evident that some findings of tangible benefit from partnership activities alone, can be questioned. For example, improvements in student academic achievement may arise from a host of variables. Establishing 'ceteris paribus' conditions in order to prove direct attribution to any one of these variables, including partnership activities, is exceedingly difficult. It has yet to be determined if the intangible benefits said to be accrued through partnerships will prove to represent a perception of the moment or an enduring legacy. And little systematic attention has been devoted to addressing any detriments to education that may have been accrued from such engagements.

Other studies have been undertaken to uncover what contributed to effective partnerships, and what hindered the achievement of productive relationships. Such investigations have revealed that partnership success can be attributed to many factors, including: leadership, communication, planning,
and co-operative administration. It has been found that executive leadership employed early in the development of community partnerships proved essential (Gallin, 1988; Lacey & Kingsley, 1988). Multi-party arrangements needed a management coordinator (Leiter, 1983; Lacey, 1983). Open communication was necessary (Danzberger & Usdan, 1984). Thorough planning was found to be important, including: the development of mission, goals and implementation strategies, communication networks, evaluation mechanisms, and strategies to address shifting priorities, participant turn-over and growth (Lacey & Kingsley, 1988). According to Boyer (1983), partnership goal-setting needed to be realistic and could best be realized by identifying, in advance, both the objectives and their projected implementation time requirements. It was also found that effectiveness resulted more often in arrangements where planning, implementation and evaluation were cooperatively developed (Lacey, 1983).

The need for all parties to be committed, and to perceive a benefit from their involvement have proved to be consistent themes. Levine (1983) and Lacey and Kingsley (1988) recognized that feelings of ownership by all participants was critical to partnership success. Foster and Rippey (1983) and Levine (1983) pointed to the need for reciprocal benefit. Otterbourg (1986) noted that the degree to which each partner perceived benefits from the interaction determined the length of the engagement. Both Deverger (1984), and Kalish, (1987) recommended that mutual needs satisfaction was best facilitated through a process that matched schools and businesses seeking similar goals (Deverger, 1984; Kalish, 1987). And Burt (1970) and Wolford (1986) concluded that partnership should involve not only those who derived mutual benefit from common and not self interests, but also those who respected and maintained the integrity of the distinctive cultures involved.

Much of the evaluative inquiry into partnerships can be seen to reflect the framework for investigation supporting the Congruence Model of Organizational Behavior advanced by Nadler and Tushman (1980). In this framework, which these authors employed to illuminate congruence and conflict, an organization is described in terms of its context, its inputs, processes and outputs. Partnership investigations appear to view the phenomena as an 'organization'. in Tjosvold's (1986) sense of a network of interpersonal and intergroup relationships which coordinate their efforts to meet a goal. The context in which these partnership 'organizations' arose is usually described, including identification of the
participants, the locale, the problems and needs that led to the engagement. Inputs are identified including: the resources available; information on how the partnership was established and; a statement of the mission to be addressed. Then processes are discussed, including the means by which goals are reached, what tasks are undertaken, together with demographic, and psychographic information. And finally, to determine output, participants are polled to identify the benefits that they perceive have been accrued. On the basis of findings from examination of context, inputs, processes and outputs, most researchers and writers have drawn conclusions about that which fosters or frustrates the collaborative engagement of business and education.

II.1.7 Current Assessment Limitations

While partnership assessments have reported the existence of different working norms demonstrated by business people and educators in collaborative engagements, for the most part these investigations offer only glimpses into the nature and extent of these differences. Further, writings that deal with differences in values and beliefs between the domains often advance notions about what these differences might mean, especially for education, without having examined an actual partnership interaction.

In her study of four New Jersey partnerships to illuminate the reported benefits from participation, Chas (1992:133) found that: “most partnership members feel, either in whole or in part, that they neither understand the partnership members from other organizations nor do they feel wholly understood”. Her respondents perceived: “differences in attitude and behavior between members of the business and school sectors” (Chas, 1992:133). However, since this investigation was focused on identifying partnership benefits, these findings were not explored in any detail or depth in the study. Chas only advocated the need for: “recognition and acceptance of differences” (Chas, 1992:133).

Other researchers have assumed or recognized some differences in work norms between education and business organizations. These differences, which have become evident when the two domains work together, have been reported to cause difficulties. Leiter (1983) identified three hindrances
to success in partnerships: implementation barriers, organizational differences and bias. Nasworthy also put forward three barriers that impeded partnership integration: “lack of ownership by school personnel and subsequent distrust and suspicion of program staff and operations; failure of school personnel to understand the motivation of business partners; and differences in corporate and educational organization schedules and operating procedures” (Nasworthy, 1988:115). Bhaerman (1983), Levine (1983), Otterbourg (1986) and Southworth (1988) observed that business people are often frustrated by the amount of time educators require to make decisions. And Levine pointed to a fundamental difference between education and business in: “the way in which people work, and the way work gets done” (Levine, 1983:11). Most proponents of partnerships speak to observable norm differences as items to be recognized, discussed, respected, understood, accepted and mutually managed in order to foster on-going collaboration. However, comprehensive information on ‘what norms?’ and ‘what difference?’ to inform such a collaboration-building process, is lacking.

In addition, two fundamental differences in values and beliefs between the sectors have been advanced: differences in organizational purpose, and differences in perceptions about the purpose of education. According to Gold, Jung and Bushnell (1982:22):

*A key distinction is that while the aim of business is to direct individualism toward the production of economic wealth, the core aim of education is to direct individualism toward self-knowledge and from that self-knowledge toward world knowledge, of which economic wealth is just one part.*

And, as Levine and Doyle (1982:275) point out:

*One major purpose is education for citizenship, socialization, and acculturation. The other is education as human capital formation, the preparation of men and women to take their place in the nation’s work force.*

It could well be that perceptions about conflicting aims and purposes could lie at the root of resistance behaviours that have been observed among some educators to, or in partnerships. Levine (1983) noted a defensive attitude by some educators who sought to protect their instructional processes. Levine and Trachtman (1988) identified a reluctance to participate in partnerships among superintendents who suspected business of self satisfying motives. And Timpane (1982) reported that a number of educators seeking to avoid business influence, but plagued by resource limitations, have employed the rhetoric of ‘partnership’ with the real intention of accruing a one-sided financial gain.
A few critics have recently surfaced who prophesy profound consequences from education's engagement with a culture driven by an economic imperative. Fallis and Chuchmuch (1993) opine that business and others engaging in educational reform: "are not working together to seek a mutually beneficial solution. They are, instead, operating as independent special interest groups seeking to implement their own perceptions and ideals in the pursuit of their own goals and agendas" (Fallis and Chuchmuch, 1993:44). In two 1995 articles whose titles underscore their message: You Don't Get Something For Nothin' (Mahaffey, 1995), and Schooled for Profit (Molnar, 1993), the authors advocate a rethinking of the trend they perceive in the substitution of market values and corporate promotion for democratic values in public education. Barlow and Robertson (1994) advance the notion in their text: Class Warfare: The Assault on Canada's Schools, that: "under the guise of 'reforming' or even 'supporting' schools, there is a great deal of activity in education advancing the interests of the competitive-corporate ideology of the right wing" (Barlow & Robertson, 1994: vii). These authors believe that: "the public must be made conscious of what it will mean if we take the 'public' out of public education, if we turn our schools into pre-employment centers for pre-adults" (Barlow & Robertson, 1994:x). And in an equally contentious message from the other end of the ideological spectrum, Davis and Bodkin (1994) claim that learning has become a "mega-industry" enabled through technological revolution and globalization. Because of business's ability to provide more learning in more effective ways, it has already become the "unwitting" competitor to public education - "an institutional dinosaur" which will, in this new market, find itself a displaced and "marginal player".

It is interesting to note that none of the above writers indicated that the research informing their writings and positions included an examination of business and education, over time, in an actual partnership configuration. Fallis and Chuchmuch, Barlow and Robertson and Davis and Bodkin drew on selected material from the literature. Mahaffey based her notions on a course she took on corporate involvement in the classroom and her own teaching experience using business-supplied curriculum materials. All but one of these writers has considerable background in one, but not both sectors. The exception is Barlow whose background as an activist includes little extensive, professional experience in either sector. Clearly, discussions and debate on the intent of both education and business needs to be
informed by inquiry on actual partnership engagements. We need to know, first hand, what values and
beliefs are perceived to be brought to partnership interactions by the parties themselves, how different they
are, and if contact precipitates the perception that they have changed. Moreover, it is important to attempt
to surface not only the values and beliefs each domain perceives about itself, but those perceived about the
other. Such inquiry can help to ground that which is currently speculation.

II:2 INTERORGANIZATIONAL RELATIONS (IOR'S)

II.2.1 'Partnerships' As 'Interorganizational Relations'

Since the 1960s, when the concept of organizations as 'open-systems' (Katz & Kahn, 1978;
Lawrence & Lorsch, 1967; Thompson, 1967) was introduced, there has been a: “a flurry of research
interest in what organizations are likely to find ‘out there’ when they venture beyond their own permeable
boundaries” (Oliver, 1987:1). According to Oliver, this research has focused: “primarily on organization-
environment rather than organization-organization (i.e. interorganizational) relations.” (Oliver, 1987:1).
However, within the past decade there has been a significant change in the amount of interorganizational
activity, and in its importance. Czander (1993) reports that, today:

Organizations are required to engage in exchanges among other organizations at a rate that far exceeds
any in the past two decades. Increasingly, interorganizational events now permeate all aspects of
organizational life. Contemporary organizations are expected to engage in relations with their vendors
and suppliers with increased intimacy and continuity. In addition, organizations face real or potential
mergers, acquisitions and joint ventures on a scale never before witnessed. (Czander, 1993:317/318).

Oliver notes an: “increasing recognition that an organization’s survival is often determined by the
strength and characteristics of its multiple ties and interactions with other organizations” (Oliver,
1987:1). Consequently, studies addressing the relational context of organizational action have become as
viable a topic of research as those addressing the environmental context.

Interorganizational relations has been described as a process occurring among organizations.
This process was initially defined by Levine and White (1960) as: “any voluntary activity between two
organizations which has consequences, actual or anticipated, for the realization of their respective goals
Levine & White, 1960:588). Van de Ven specified the activity as an exchange which: “occurs when two or more organizations transact resources (money, physical facilities and materials, customer or client referrals, technical staff services) among each other” (Van de Ven, 1976:25). Such connections have also been described as a domain or structure in which multiple party connections reside. For Aldrich (1979): “an action set is a group of organizations formed into a temporary alliance for a limited purpose” (Aldrich, 1979:280). Van de Ven, Walker and Liston (1979) define an “interagency network” as: “the pattern of interrelationships among organizations that are vested together as a social system to obtain collective and self-interest goals or to resolve specific problems for a target population” (Van de Ven, Walker & Liston, 1979:21).

Van de Ven, Walker, and Liston (1979) described three forms of such relationships. “Pair-wise” relationships involve two organizations. Recently, for example, two formerly competing software development companies have joined forces in the creation of a mutually compatible operating system. An “interorganizational set” configures one focal organization with other related organizations in its environment. Witness the common practice whereby a manufacturer and its dealers engage in co-operative advertising programs. And an “interorganizational network” involves a web of organizations in a social system created to resolve specific problems, such as a commodity exchange. An additional variation of interorganizational network - the “hub and spoke” configuration, has been advanced by Kataoka (1995). In this case, a central organization, for instance - the United Way - is established to coordinate network activities.

IOR’s: “are characterized by tremendous variety, pervasive change and conflict, the presence of a great number of confounding variables, and especially the propensity for some organizations to socially construct their own environments” (Zeitz, 1980). As a result, consensus on a definition of the field has not been reached. And the criteria by which organizational sets or networks have been defined, vary. Provan advocates the selection of parties: “that share organizational ties that can be recognized as a bounded interorganizational system (Provan, 1983:79). Oliver explains that, although organizational set selection is assumption-dependent and therefore, arbitrary, the perception of ‘relatedness’ is necessary to avoid the problem of reincarnation. She notes that: “the more indefinable or arbitrary the boundary around an
interorganizational field, the less likely it is that the researcher’s abstract conception of that field will coincide with any real ‘thing’ which exists ‘out there’” (Oliver, 1987:11). Naturally occurring networks have been observed by: “industry, resource commonalities, perceived interdependencies or alliances, shared output markets, organizational goals or types of transactional connections” (Oliver, 1987:12).

II.2.2 IOR Research Limitations

While numerous studies have been conducted on interorganizational linkages within the private or public sectors, it can be observed that little attention has been given to the growing trend in linkages involving private and public sector organizations. For example, an examination does not appear to have been undertaken on the object of this dissertation - business/education partnerships. These partnerships that link organizations across sectors, which occur in “pair-wise”, “interorganizational set” or “hub and spoke” forms, represent naturally bounded, real ‘things’ which exist ‘out there’ in significant numbers. These facts position business/education partnerships as a viable topic for IOR research.

Further, in her examination of IOR studies between 1970 and 1985 and significant investigations prior to 1970, Oliver found that: “there is no integrated treatment in the literature of the social context of interorganizational relations” (Oliver, 1987:37). She remarks that, “despite the theoretical attention to the role of social norms and institutionalization, there have been remarkably few studies pertaining to IOR’s” (59). During and following the period investigated by Oliver, references to issues pertaining to organizational culture have been made in theoretical and empirical work. Factors underlying network-like forms of organization have been found to include not just the concern for efficiency and cost minimization, but norms of trust and reciprocity.

Pfeffer & Salancik (1978) posit three norms, which they deem are necessary to maintain stability and continuity in these relationships: norms prohibiting cutthroat competition, norms restricting undue influence, and reciprocity understandings. Boje & Whetten’s (1981) study of social service agencies found that organizations with ideologies that are different from the majority of organizations in a network will occupy a less central position and be less influential. Sebring’s (1977) case study of a university and
government agency described how differences in goals, reward structures, structural formality and time orientations can contribute to interorganizational conflict. And writings by Pfeffer & Salancik, 1978; Van de Ven & Walker, 1984; Van de Ven, Walker & Liston, 1979; Hall, 1976; and Provan, 1982 have explored the issue and importance of interorganizational communication.

Czander concludes that: “In spite of demands that organizations engage in interorganizational relations little is known about the nature of these events” (Czander, 1993: 318). In particular, we lack information on interorganizational networks established between the private and public sectors such as business-education partnerships, and we have only a limited understanding about the workings of organizational culture in these social systems.

II:3 ORGANIZATIONAL CULTURE

II.3.1 A 'Most Complex Whole' Inviting Diversity Of Opinion

Ouchi (1981), and Pascal and Athos (1981) recognized that organizations develop policy that reflects an underlying philosophy. According to Louis (1985), Sathe (1985) and Smircich (1983), organizational members share distinctive understandings. For Deal and Kennedy (1982) organizations espouse dominant values. Barnard (1938) observed that codes of conduct exist in successful formal organizations to promote commitment, identity, coherence and a sense of community. Homans (1950), Ouchi (1981), and Schall (1983) found, as had Mayo in his earlier Hawthorne investigations (Roethlisberger & Dickson, 1939), that norms were evident in working groups. Goffman (1967) and Van Maanen (1979) noted that consistent interaction behaviors are portrayed in organizations, such as the use of specialized language. Tagiuri and Litwin (1968) pointed to the feeling or climate communicated by an organization’s physical space and interaction behavior in and outside that space. And, according to Siehl and Martin (1990), organizations exhibit cultural forms such as stories, rituals, and jargon.

These examples of what constitutes ‘culture’ in organizations can be seen to reflect two, different phenomena - the abstract and invisible concept of culture, and the concrete and observable manifestations that signal and symbolize its existence. Schein states that: “the essence of culture” (Schein 1990:7)
involves the basic assumptions, beliefs and values that embody the often unconscious and taken-for-granted view of the organization possessed by its members. This view represents a shared understanding concerning the nature of: reality, truth, time, space, human nature, human activity and human relationships (Schein, 1985). Bruner (1996) contends that because these abstract phenomena lack behavioral indices, knowledge about them is difficult to attain, even by the people who hold them. As Smircich points out: “people hold culture in their heads, but we cannot really know what is in their heads. All we can see or know are representations or symbols” (1985:67). What can be observed - the manifestations of culture, include:

- ‘norms’ : “rules of behavior which have been accepted as legitimate by members ” (Haire, 1962:24);  
- ‘artifacts’: “visible organizational structures and processes” (Schein, quoted in Frost 1991:252); “tools, buildings, art, and technology “ (Owen, 1991:173-174); corporate documents and dress code (Schein, 1990:111) and ;  
- ‘symbols’: “ rituals, myths, traditions, rites, and language” (Owen, 1991: 173-174).

Culture is visibly exercised and perpetuated through these manifestations where: “ human meanings and values are transmitted literally from one generation of the organization to another”(Owen, 1991:173-4).

In the substantial body of literature that deals with organizational culture, it has been represented, not only on the basis of what it ‘is’, but also by virtue of what it ‘does’. In 1938, Barnard stated that culture allows people to find meaning in their work and life. Deal found that it: “provides stability, fosters certainty, solidifies order and predictability, and creates meaning” (1985:301). Smircich asserted that culture acts as a means through which: “organization members both create and sustain their view of the world and image of themselves in the world (Smircich, 1983a:56). According to Schein, culture represents: “a body of solutions to external and internal problems that has worked consistently for a group (Schein, 1985:19-20). These experience-based solutions are transmitted as: “ a learned pattern of unconscious (or semi-conscious) thought, reflected and reinforced by behavior, that silently and powerfully shapes the experience of a people” (Deal, 1985:301). Alternatively, Jermier takes a critical view of the workings of organizational culture which he contends: “ reflects, first and foremost, the divergent economic and political interests of capital and labor” (1991:231).
Two additional features relating to what an organizational culture ‘does’ have been noted by Hamada (1994). He observed that: “organizational life is more fluid than linear. Decisions, actors, plans, and issues continuously carom through an ever-changing labyrinth of meanings, statuses, barriers and traps” (1994:26). While organizational cultures can remain stable, they can also change over time. In fact, according to Becker: “people create culture continuously”. (1982:521) Hamada also notes that organizational culture does not exist in isolation. Rather, it: “is a socio-cultural system embedded in larger socio-cultural environments” (Hamada, 1994: 26). There appears to be a strong and dynamic relationship between organizational cultures and the larger societal cultures in which they reside. This relationship has been noted by Hofstede (1980), whose large scale survey of employees of a global firm revealed that differences in responses had to do with nationalistic differences, even though these people worked for the same company.

Any review of what has been found to constitute ‘culture’ reveals a vast, multi-phenomenal, complex, subtle, dynamic, influential ‘power’ whose ‘being’ appears to defy linguistic encapsulation in a single, accepted definitional form. Berger and Luckman (1966) note that culture is a socially constructed reality and, as such, how culture is described and defined depends on how one perceives it. That perceptions differ became clear in a study conducted by Kroeber and Kluckhohn (1952), which revealed that anthropologists had advanced no less than 164 different meanings of the term.

The concept of ‘culture’ initially applied to the study of organizations in the 1930’s: “does not come from anthropology as an intact structural package ready to serve as a paradigmative foundation on which to build the analysis of organizations” (Smircich, 1985:57). According to Reis-Louis, the study of culture is: “analogous to the Sufi story of the blind men’s efforts to decipher the elephant. Many are interested; some pursue one end of the beast, others pursue another” (1985:81). Since researchers: “do not study the same phenomena”, culture’s: “multiple layers of meaning...may be unpacked in may different ways with many different consequences” (Frost, 1991:337). Schein observes that he, and his colleagues: “find that we agree ‘it’ exists and is important in ‘its’ effects, but...we have completely different ideas of what the ‘it’ is”. (Schein, 1990:5). Consequently, “organizational culture researchers do not agree about what culture is” (Frost, 1991:7).
According to Martin, these disagreements have often led to "vehement conflict", in cases where: "one culture researcher's assumptions are, to a researcher working from a different perspective, evidence of epistemological naiveté, methodological sloppiness, or inexcusable political bias" (1992:11). A number of writers have come to the conclusion that this condition of conflict is counterproductive. Martin, for example, points out that: "researchers often fail to appreciate, acknowledge, or even read research representative of other viewpoints", with the result that: "effort is wasted and opportunities to learn are missed" (Martin, 1992:11). And Schein argues that disagreements on "how to define it, 'measure' it, study it, and apply it in the real world of organizations" threatens the acceptability and survival of 'organizational culture' as a field of inquiry (Schein 1991:243). Notwithstanding these voices of concern, inquiry into organizational culture continues to reflect the characterization Geertz applied to anthropology: "a science whose progress is marked less by a perfection of consensus than by a refinement of debate. What gets better is the precision with which we vex each other" (Geertz, 1973:29).

Two factors have been posited to explain why researchers differ in how they view and study organizational culture:
- the influence of the field and discipline in which the researcher is trained; and
- the influence of the researcher's epistemological and paradigmatic orientation to inquiry.

II.3.2 Factors Precipitating Diversity - The Influence Of Different Academic Fields

Organizational culture is a focal point of investigation by researchers from anthropology, education, organizational and administrative science, social psychology, sociology, and other social sciences. Each of these fields or disciplines has its own specialized knowledge, professional traditions, and associations. Each publishes journals whose referees determine what is (and is not) suitable for publication. Each also inculcates its students in what are (and are not) acceptable research practices, based on assumptions that are dominant in the field. Goetz and LeCompte note that: "such training predisposes researchers to examine phenomena from certain perspectives and to ignore other views of the world" (1984:43). Each of these fields exhibits many of the characteristics of a 'culture' which is capable of
influencing its participants long after graduation. Frost states that: "as a seasoned researcher designs and conducts a study, most of the time, much of what that individual does comes out of the template of his or her professional tradition" (Frost, 1991:329).

The study of organizations has experienced major shifts in focus as researchers from different disciplines have addressed the matter with their own, particular "programmed way of seeing" (Hofstede, 1980). Consider, for example, the evolution of the field - from early in this century when organizations became a focus for inquiry, to the 1930s when the concept of "culture" was applied. This period reflects Morgan's (1988) delineation of the three models of organization (or 'root metaphors') that enable people to understand organizations in distinctive yet partial ways, closing off other ways of seeing: organization as 'machine', as 'organism', and as 'culture'.

The study of organizations was initially conducted by those from the 'hard' sciences, such as engineering. Following the principles of 'Scientific Management', optimal worker behavior and performance were viewed as the automatic product of efficient production processes, demarcated tasks, and appropriate working conditions (Taylor, 1923). In the 1930's a psychologist turned his focus on an organization and triggered an entirely new school of thought. That psychologist - Mayo, found in his initial study at GE's Hawthorn Plant, that changes in output were more profoundly affected by psychological factors than by physical conditions. The engineers had focused on processes. The psychologist focused on people. For his third Hawthorn investigation, Mayo engaged Warner, who had studied anthropology under Radcliffe-Brown and Malinowski. Warner produced: "a systematic description of the social organization of an industrial working group" (Chapple, 1953:820). This work positioned him as the: "first anthropologically-trained scholar who applied the functionalist culture paradigm to industrial organizations in North America" (Hamada, 1994: introduction). The anthropologist focused on culture.

Since that time, other foci, brought by those trained in different disciplines, have illuminated previously invisible, or little known constituents of organizational culture. Examples include: the view of semiotics added by linguists, and interpretive sociologists; a focus on symbols and power, central concerns in sociocultural studies; inquiry into cultural ambiguities by those from organizational behavior and political science, and the analysis of folklore in organizations conducted by historians. As a result, the
phenomenon has grown from these insights and expanded in conceptual complexity. And definitions have been shaped around the particular, 'professional way of seeing' with which culture has been viewed.

**II.3.3 Factors Precipitating Diversity - The Influence Of Different Academic Beliefs**

According to Pheysey: "those who study organizations are themselves affected by culture, the culture of the scientific community to which they belong" (1993:190). Researchers into organizational culture differ, not only in their professional traditions, but in their beliefs about what constitutes knowledge - their epistemologies. Popkewitz asserts that, "differences in conceptual lenses...often represent deep-seated differences in root assumptions about the nature of the world to be investigated" (1984:5). In the evolution of social science, two different and competing epistemologies have emerged.

In 1894, Windelband characterized two styles of scientific inquiry: 'nomothetic' and 'ideographic' (Lammers, 1976). Each of these 'styles' is founded on different assumptions about the world. The analytical/empirical science is nomothetic - aimed at establishing 'gesetze' or general laws. In 1737, the philosopher, Hume recommended that Newton's natural science approach should be applied to the study of human life and conduct (Coppleston, 1985b). Hume was the first exponent of what has come to be known as the 'cultural rationalist position' - that human nature is regularly organized, with characteristics that are fundamental, general and constant. For those who hold this position, context is not significant.

Alternatively, the cultural or social sciences and humanities have traditionally followed historical/hermeneutic science (and later, critical social science) which is ideographic, representing 'gestalten' - "unique configurations of particular events, conditions or developments" (Lammers, 1976:30). This 'cultural relativist position' was first advanced by the Post Enlightenment philosopher of history, Herder. He believed that: "we ought to study each culture and phase of culture on its own merits, seeking to enter into its complex life and to understand it, so far as possible, from within, without judgments about better and worse, happier and less happy" (Coppleston, 1985c:143). In this case, the context is significant, since it is the variability, and not the unity of human nature that is purported to be
the essence of culture. Simply put, one perceives that organizations *have* culture, or, one perceives that organizations *are* culture (Smircich, 1983b).

Three 'paradigms', defined by Patton as: "a way of breaking down the complexities of the real world" (1978:203) have been constructed out of these two, underpinning assumption-sets. Each paradigm embodies a specific set of ideas and tools that, "either give us some judgment about the nature of reality, or a reason why we must be content with knowing something less than the nature of reality, along with a method for taking hold of whatever can be known" (Reese, 1980:352). Each defines, not only what constitutes a cultural system, but also the mode by which it is represented. Operating on the basis of the Cultural Rationalist view of human nature is the *analytical/empirical paradigm* which represents the positivist, objectivist, behaviorist, scientific approach, based on observer categories, concerned with measurement and function. According to Popkewitz: “the analytical/empirical paradigm defines ‘systems’ as independent sets of variables” (1984:48) which are objectively presented to dissociate the data from any particular meanings, interpretations or values.

Arising out of the Cultural Relativist view are two paradigms, each of which focuses on an interpretive, nonpositive approach, based on indigenous categories, concerned with meaning. In the *hermeneutic/historical paradigm*, a system is a particular situation in which consensual norms are established. The system is considered in isolation. Here, the researcher attempts to accurately and dispassionately represent the point of view of the members of the culture under investigation, in order to arrive at what is known as a 'subjective understanding’. For the critical science paradigm, “a particular system is considered, not in isolation but in relation to other aspects of society that influence its own form as well as that of others” (Popkewitz, 1984:48). Critical scientists embrace researcher subjectivity openly, as a necessary political choice.

These paradigms can be seen to have an influence on how organizational culture is currently approached and defined. Following what Schein calls the ‘analytic/descriptive approach’ (1990, 1991) are those researchers who, motivated by a need to address empirical data, focus their investigations on the observable manifestations of one or more organizational cultures. This symbolic dimension is suitable for decomposition into one or more discrete components that can be objectively observed and described. This
has allowed researchers to pinpoint their investigations on particular symbols that accord with their interest or area of specialization. Schein observes that these components often become the de facto definition of culture. For example, Periniola considers his domain of investigation - corporate rituals, to represent, in postindustrial society: “the dominant organizational model of the culture” (1982:29). For him, ritual is culture.

Schein notes that other researchers with: “a passion to measure and quantify” (1991:243), employ a ‘survey research approach’. In this case, it is not the symbols, but cultural or cross-cultural attitudes and values that are the focus of investigation. Questionnaires enable these researchers to collect responses into common dimensions established a priori or through factor analysis. Commonalities are sought based on the assumption that organizational cultures share like dimensions. Hofstede (1990), an exemplar of this approach, defined organizational culture as: “a programmed way of seeing”. For him, perception is culture.

Schein’s ‘analytical descriptive’ and ‘survey research’ approaches which conceive culture in terms of symbols or perceptions, can be seen to reflect an objective understanding of culture dictated by positivist values. However, even some of these researchers themselves point to the existence of ‘something deeper’. For example, in their discussion of the design instrument they used to gather the perceptions of 3,600 managers in 14 countries, Haire, Ghiselli, and Porter admitted that: “this form of tapping attitudes [the questionnaire] has real drawbacks - among them being that it makes it harder to go into great depth in the exploration of attitudes” (1966:2) To examine culture in depth, according to Schein, requires a different approach he calls: ‘ethnographic’.

Assumptions and beliefs cannot be observed and measured. They can only be represented and interpreted. Qualitative methods enable investigation of the ‘deeper structures’ of a particular cultural construct or milieu. According to Bryman: “Probably, the most fundamental ingredient of qualitative research is the preference for ‘seeing though the eyes of one’s subjects” (1991:206). Ethnography (literally: ‘folk’ ‘description’) is the principal vehicle used to “describe a social group, usually small...using participant observation, conversation, and interview techniques.”(Riley, 1991:216). Eschewing positivist in favour of interpretivist values, these researchers seek to understand the subjective
experiences they are attempting to describe. And, for those following critical values, it is necessary to expose the power relationships at work in the organization’s culture. Leach (1982), contends that culture is: “a way of life”. For him, a shared meaning is culture.

While symbol is culture, perception is culture, and shared meaning is culture; culture is more than the sum of these parts. It: “can never wholly be understood by one frame, through a single design, or by using one research technique.”(Frost, 1991:339). Geertz admits that: “Cultural analysis is intrinsically incomplete. And worse than that, the more deeply it goes the less complete it is” (1973:29). Therefore, organizational culture is today: “a polemical concept which does not lend itself to a single definition” (Ott, 1989:69).

III.3.4 Dealing With Diverse Opinions

The profound differences among the professional orientations of researchers who address organizational culture are unlikely to change. Specialized knowledge cultures demonstrate a strong propensity for self-perpetuation. And, according to Chapman: “the epistemological tussle between objectivism and positivism, on the one hand, and interpretive approaches, on the other, looks set to continue” (1997:24). Bruner (1996:7) states that: “there is no decision procedure known” that could resolve what he calls the “incommensurability” between positivists and interpretivists. Consequently, any research approach serves to illuminate some aspect of organizational culture, but to leave ‘out of sight’, something else. This situation begs the question: ‘how can a more holistic view of the phenomena be achieved?’.

Czarniawska-Joerges suggests that: “we live in multiple strange worlds whose colonization is quite impossible; why not accept their existence and make ourselves more familiar with them?” (1991:297). Those from different professional orientations, different epistemologies and paradigms whose work represents different perceptions about the subject: “can enable us to gain a greater insight into the whole and into the relationship of the elements to that whole” (Popkewitz, 1984:54). Soltis argued that “viewing the current scene in a more holistic manner” is: “not just a pluralistic tolerance of different
research philosophies" (1984:5). He advocates Bernstein's (1976) notion that honesty to the subject matter requires that complex social phenomena be studied tridimensionally. This approach may be easy to conceive, but difficult to execute. Reis-Louis advises that any study on organizational culture faces: "the awesome burden of comprehensiveness" which requires: "a framework for subdividing and bounding the topic" (1985:81).

A multi-dimensional framework for the analysis of organizational culture has been developed, on the basis of an examination of cultural investigations undertaken by numerous researchers representing a spectrum of professional orientations, epistemologies and paradigms. These studies were categorized, not on the basis of the conception of research they represented, but on the perspective of organizational culture they portrayed.

III.3.5 A Three-Perspective Framework

In 1987, based on preliminary work by Martin and Siehl (1983), and Martin, Sitkin, and Boem (1985), Martin and Meyerson of Stanford University released the results of an extensive review of studies involving organizational culture. They found that the authors of these studies reflected particular perceptions about culture, and that some authors represented different perceptions in different studies. Analysis of the features of similarity and difference among these studies resulted in what Martin and Meyerson call their: Three Perspective Framework. While these authors voice a critical science orientation, Frost contends that the framework is useful for those representing any scientific persuasion, who seek a broad understanding of what has been learned about organizational culture (1991:9). In addition, he suggests that researchers should: "consider studying single cultural contexts using all three perspectives sequentially so that the integrity of each perspective is preserved, yet the complementary benefits of a multiple-perspective approach are made available" (Frost, 1991:339).

Studies that represented what Meyerson and Martin call: the integration perspective, exhibited three central characteristics: "consistency across cultural manifestations, consensus among cultural members, and - usually, a focus on leaders as culture creators" (1987:625). Researchers who reflected this
perspective focused only on variables that manifest and reinforce themselves consistently across, and throughout an organization. Consensus was perceived to exist at all levels within the organization, signaling the presence of shared values. Martin and Meyerson state that much, though not all of the work they reviewed, stressed the importance of the leader's values in the development of the organization's culture - values that are adopted, and often become institutionalized. Ambiguity, which is defined as that "...which is unclear, inexplicable, and perhaps capable of two or more meanings" (1987:625), such as inconsistencies, conflict, or even subcultural differentiation were presented either as evidence of a lack of culture, or as a signal of dysfunction. Implicit in these studies was the notion that culture can be controlled. Martin and Meyerson found that "while important differences exist among (these integration) researchers, they generally emphasize these characteristics and share a common set of blind spots". whose identity and importance, "become evident if we look at culture...from alternative lenses"(1987:630).

Employing an alternative lens, Martin and Meyerson brought into focus other studies that conceptualized culture, not as a closed system, but as an open system, formed by the influence of constituent subgroups and individuals from both inside and outside the organization. In this case it was not the leader who was deemed responsible for cultural content. This differentiation perspective locates cultural consistency, consensus, and clarity primarily at the level of subcultures. "Complex organizations reflect broader societal cultures and contain elements of occupational, hierarchical, class, racial, ethnic, and gender-based identifications... (which represent) sources of diversity (that) often create overlapping, nested subcultures"(1987:630). Within a particular organizational context, these researchers focused their interest in the mix of subcultural differences that operated in harmony, conflict or indifference, even if a dominant, integrated umbrella culture was acknowledged to be present. The organization was viewed as "a mosaic of inconsistencies", where ambiguities are recognized as appearing, but are found, "only in the interstices between subcultures" (1987:633).

Martin and Meyerson cite a third group of studies that concern culture, by non-culture researchers who investigated organizations. In particular they cite the work undertaken by March and others who characterized many public sector bureaucracies and educational institutions as: "organized anarchies" (March & Cohen, 1986, March & Olsen, 1976). This work differed from each of the previous
two perspectives primarily in how ambiguity was treated. In this *fragmentation perspective*, cultural stasis at the organizational or subcultural level is not perceived to manifest itself except in transient, issue-specific moments. Organizations are complex systems, and their membership is culturally diverse. Organizations continually face a variety of issues and events which precipitate problems and change. Ambiguities arise, and it cannot be assumed that cultural members will have similar reactions. From this perspective, “researchers and cultural members see (and even look for) confusion, paradox, and perhaps even hypocrisy - that which is not clear” (1987:637).

Each of these perspectives represents different notions about authority and change. While the integration perspective supports established authority, the differentiation perspective implicitly challenges it - attempting to articulate alternative points of view, stressing the importance of difference, and sometimes acknowledging the dynamics of power, conflict, and oppression. The fragmentation perspective undermines the unifying claims of any established authority or any subgroup that would try to establish an alternative authority. Those who support the integration paradigm see change as monolithic and revolutionary upheavals as issues that can be controlled by the organization's leadership. In the differentiation perspective, change is seen as an incremental process with intentional and unexpected impact. Change is not perceived to be predictable, nor controllable across the organization as a whole. The fragmentation perspective believes that change is constant, enacted by all cultural members and by cultural forces beyond the organization.

Because of their critical orientation, Martin and Meyerson recognize multiple perspectives and promote the need to use all three perspectives as a framework to generate an understanding of any cultural context - particularly when the investigation is dealing with the issue of change. The use of a single perspective they see as incomplete, since each perspective is 'blind' to the equally valuable, but different understanding generated by the others. They further argue that the beliefs and assumptions of each perspective are fundamentally incompatible and cross-perspective theoretical integration would very likely destroy the integrity of each; it would destroy their power and political reasons for being as well” (Frost, 1991:339).
In order to illustrate its use in the study of an organization, Martin and Meyerson (1987) applied the framework in a short description of a government agency. Since that time, it has been employed by Martin and Meyerson to study a large electronics corporation (1986). Frost and his colleagues used it as the organizing structure for their text (Frost, 1991). And Martin has subsequently refined the framework, and applied it to the study of a specific, private sector company in her book: Cultures in Organizations: Three Perspectives (1992). The framework has, to date, not been applied to cultural examinations of interorganizational contexts.

II:4 STUDIES ON ORGANIZATIONAL CULTURE IN EDUCATION

II.4.1 Education’s Focus on ‘Climate’ Studies

The general literature about organizational culture has been found to often ignore investigations on this topic that have been conducted on schools. Among the enormous number of studies reviewed by Martin and Meyerson, for example, only one study relating to schools was mentioned (Pettigrew, 1979), and the authors themselves note that: “most previous cultural research has focused on private sector organizations” (1987:626). Contributions to the field of organizational culture by, or focusing on education do, I believe, deserve particular attention in this dissertation.

Owen reports that: “with the publication in 1962 of a research report, entitled: The Organizational Climate of Schools, Andrew W. Halpin and Don B. Croft introduced the notion of organizational climate to educators” (Owen, 1991:186). Halpin and Croft hail from the University of Chicago (U of C), where, in 1943, a group of anthropologists led by Warner (of Hawthorne fame) and Gardner established the ‘Committee on Human Relations in Industry’ from which the rubric: ‘Human Relations School’ emanated. But, it is significant to add that by 1962 organizational studies at U of C was no longer dominated by anthropologists. Also significant are: the timing of their study, and their use of the term ‘organizational climate’.
In 1961, Waldo issued a challenge to the practice of studying organizations by anthropologists or anthropological methods. He argued that the development of organizational theory required a positivist approach following the notion that organizations' existence as objective realities allowed them to be studied by value-free science, and explained by analyzing their constituent parts as elements of a functioning whole (Waldo, 1961). Czarniawska-Joerges (1992) has pointed out that Waldo's proclamation represented a point of departure between organizational studies and anthropology, and during the rest of the '60s: “very few anthropologists continued to work on western organizations” (Wright, 1994:15) The methodologies employed in studies addressing the social fabric of organizations began to shift from anthropological to those employed by psychologists and social scientists. And the term ‘culture’ was replaced by terms such as: “organizational climate” (Frederiksen, 1966; Tagiuri & Litwin, 1968). Owen notes that: “organizational climate is the study of the perceptions of participants of factors in the organizational environment that are likely to reflect the culture of the organization” (1991:187) Those who study ‘organizational climate’ tend to reflect Schein’s ‘survey research approach’ described earlier, in which “culture has been viewed as a property of groups that can be measured by questionnaires leading to Likert-type profiles” (Schein, 1990:110).

Halpin and Croft’s study gathered responses from elementary school teachers about teacher behavior and principal attributes, employing a sixty-four item questionnaire. To statements such as: “teachers socialize together in small, select groups”, and: “the principal set an example by working hard”, the teachers were asked to check from among four degrees of occurrence - ‘rarely’, ‘sometimes’, ‘often’ and ‘very frequently’. (1962:122-24) It was found that there was a strong relationship between how the teachers behaved as a social group, and the leadership style of the principal. From this they developed a range of school ‘climates’ – from ‘closed’ to ‘open’. For example, in schools with a ‘closed climate’, the teachers perceived that the principal demonstrated an authoritarian style, focusing on rules and paperwork over people. In those schools teacher turnover was high, and the staff was seen to exhibit low morale, little collaboration, and little engagement or satisfaction in their work. Opposite principal attributes and staff behaviors were perceived to exist in an ‘open climate’ school. Owen states that: “a major outcome of the Halpin and Croft research was the demonstration that, by using the set of perceptions that the Halpin and
Croft questionnaire probed, the organizational climate of elementary schools may be systematically assessed” (Owen, 1991:175).

Since this seminal work, other questionnaire-based examinations addressing organizational climate in schools have been undertaken. In 1967, Likert adapted the questionnaires he had employed to characterize business organizations for his studies on schools. These questionnaires solicit numerical responses, from ‘1’ (‘not well’, ‘rarely’ etc.) to ‘8’ (‘very well’, ‘often’ etc.) to questions concerning: leadership processes, motivational forces, communication processes, decision-making process, goal setting processes and control processes. By administering these questionnaires to different groups (such as principals and teachers), Likert has produced profiles that visually trace the similarities and differences in mean scores along: Climate variables (such as “goal commitment” and “team cooperation”), Leadership variables (like “support by leader”), Trust variables, and Other variables (including, “motivation”). In addition, “End Results” such as the level of frustration are indicated. From his study of many educational groups, Likert has arrived at some critical assessments of the culture, including his notion that: “the present decision-making structure of the schools requires patterns of interaction that often aggravate conflict rather than resolving it constructively” (1976: 218-219). Stern and Steinhoff (1975) developed a two dimensional ‘Organizational Climate Index’, based on teacher ‘true’ or ‘false’ responses to a 40-item list of statements. This index has proved useful in mapping climate differences among schools, and school groups; and to demonstrate, for example, the differences between the climates of new schools and those in operation for an extended period. And, Epstein (1984) has surveyed student satisfaction, school work commitment and attitudes towards teachers, via a 27-item questionnaire designed to describe the quality of life in elementary, middle and high schools.

Numerous other studies have attempted to reveal the climate of schools through the association of significant variables. Contributing to the view now known as ‘ecological psychology’, Barker (1968) theorized that environments exert a significant influence in shaping the behavior patterns of those who reside within them. Together with Gump (1964), Barker found a correlation between the size of high schools and the extent of participation by students in extraclass and extracurricular activities. This focus was pursued further by Baird (1969), who found that student performance and extracurricular
participation were related to two factors - the size of the school, and the size of the community in which it was situated. In a study on twelve inner-city London schools, Rutter (1979) found that student attendance, behavior, and grades: "were not due to such physical factors as the size of the school, the age of the buildings or the space available; nor were they due to broad differences in administrative status or organization (for example, structure)...the differences between schools in outcome were systematically related to their characteristics as social institutions" (1979:178). These characteristics included: the behavior demonstrated by the teachers, the emphasis that was placed on academic achievement, the existence of a student performance recognition system, and the degree of responsibility the students were allowed to assume. Rutter and his colleagues posited from this study that organizational culture can be managed.

Other studies have attempted to establish the dependence of some measure of school effectiveness on matters of organizational climate, following previous studies that related student performance to socio-economic variables (see, for example, Coleman, 1966 and Jencks, 1972). Brookover (1978) related the fourth grade standardized test performance of thousands of Michigan school children to racial composition of the school (percentage of white students), and a measure of student norms and expectations (established by the student's "sense of academic futility"). He found that the crucial variable proved to be the school climate norm, concluding that: "if the social-psychological climate relevant to the poor and minority is improved in conjunction with desegregation, higher achievement is likely to result" (1978:317). Moos' (1979) large scale studies involving 10,000 secondary students revealed that issues such as: attendance, grades, student satisfaction with learning and with teachers, were directly related to classroom climate variables such as: the emphasis placed on competition and rules, the extent of teacher support, and the presence of innovative activities. Moos also considered environmental factors, concluding that educators needed to attempt to provide those environments, norms and teaching behaviors that best suit student needs in order to motivate them to stay in school and maximize their abilities.

Studies on organizational culture in education that do not involve a survey-research approach are few, and dominated by one man - Sarason. Long before the national movement to change education in the US materialized in the 1980's, Sarason's investigations into the professional culture of schools revealed to
him that: “any effort to change schools that was not informed by an understanding of the culture of schools was doomed” (1995:68). Realizing, from his initial studies in the ‘70’s, that a school’s physical structure, activities, and observed temporal patterns exert considerable influence on the behavior of the participants, he undertook to explore those behaviors in greater depth. Sarason’s approach was distinctly hermeneutic, offering ethnographic-like vignettes to underscore his insightful observations about what principals and teachers are like, and how they behave and think. Sarason has observed and interviewed teachers in their milieu, employing what can be seen as an anthropological approach, viewing interviewees as cultural ‘informants’. Through discussions with individuals he has probed why specific activities are undertaken, why certain roles exist, and what consequences would result from their removal. It is his opinion that: “the concept of the school culture refers to those aspects of the setting that are viewed by school personnel as “givens” or essential features, which they would strenuously defend against elimination or marked change, and which to them reflect psychological concepts and value judgments” (1985:71). Sarason seeks “two major consequences” from his approach: “the first would be a clearer picture of what school personnel consider to be essential activities in the setting without which they would not apply the label ‘school’ to it. The second consequence would be a much more explicit statement and understanding of the thinking and reasoning of the school personnel” (1985:72). Sarason’s work has served to move our cultural inquiry from identifying manifest elements and their relationships, to describing some of their highly complex patterns and meanings. And, unlike many others, he demonstrates a multi-perspective view of educational culture - recognizing its unique subcultural differences, together with its pervasive cultural similarities.

II.4.2 Rationale For A Different Approach

In education, we have developed a rich understanding of numerous aspects of school climate, and their relationships and significance. However, few researchers have undertaken the exceedingly difficult and time-consuming task of addressing the holistic phenomena of culture. Even Sarason, one of few to attempt an ethnographic-like approach, admits that: “school culture has hardly been examined or studied
(1985:70), and that it represents: "a highly complicated and highly organized social system which we are far from understanding" (1985:78). Schein argues that developing questions with which to prompt informants to reveal their perceptions about how they look, behave and think requires the researcher to make assumptions, and: "one cannot infer the assumptions unless one has done extensive ethnographic research" (1991:252). Few researchers studying organizational climate in education indicate that they have preceded their studies with extensive ethnographic research.

Our attempts to reveal culture by stimulating participants to describe it generates an incomplete understanding, according to famous anthropologist Edward Hall, because culture: "hides much more than it reveals, and strangely enough what it hides, it hides most effectively from its own participants" (1959:53). He suggests that: "the people who live by the system ... can tell you if you are using the system correctly or not" ... but they: "can tell you very little about the laws that govern the way the system works". (1976:146). Hall claims that his understanding of 'out of awareness culture' has resulted from: "actual observation of real events in normal settings and contexts". (1976:146). But he also references another way, in his admission that: "I never would have understood the degree to which American's use time, not only to structure their lives but as a contexting communication system as well, if I had not been through the experience of observing my countrymen trying to cope with other time systems" (1976:39, emphasis added). According to Hall: "the only time one is aware of the control system is when things don't follow the hidden program. This is most frequent in intercultural encounters... by interacting with others who do not share that system" (Hall, 1976:39).

On the basis of Hall's notions, I believe that much about the 'out of awareness' culture of education might be gleaned by investigating this sector's interorganizational relations with business. Systemic education/business partnerships represent out-of-context, relatively long term working associations which provide the opportunity for educators and business people to become aware of each other's culture. Moreover, their experience in dealing one with the other, could serve to generate a cultural self-awareness, as taken-for-granted notions become visible in juxtaposition to those that are different and unfamiliar. Partnerships afford educators the opportunity to do what they don't do in the confines of their home environment, where Sarason has observed: "the relative lack of meaningful, open,
and sustained discussion among school personnel about their work, goals, professional problems, and explicit or implicit theoretical orientation” (1985:76). To “get at” this information, we need to follow Hall’s advice:

*A given culture cannot be understood simply in terms of its content or parts. One has to know how the whole system is put together...This brings us to a remarkable position; that it is not possible to adequately describe a culture solely from the inside or from the outside without reference to the other. Bi-cultural people culture-contact situations enhance the opportunity for comparison.* (Hall, 1976:195).

**II:5 SUMMARY OF LITERATURE REVIEWS**

The literature on ‘Education-Business Partnerships’ is rich in evaluative writings and research on the benefits these interactions are perceived to offer, and on factors that have been found to contribute to their collaborative functioning and perceived success. In addition, investigation of each of the sectors independently has led to polemics about the intent and consequences of such affiliations. Within this body of work, differences between the organizational cultures of education and business are either noted, as a corollary finding, or assumed to exert an important influence in these inter-sector configurations. However, a non-evaluative, systematic, longitudinal investigation of organizational culture in the actual context of a business-education partnership does not appear to have been undertaken to date, to ascertain the social nature, extent and implications of these relationships.

A review of the business literature on ‘Interorganizational Relations (IOR’s)’, has disclosed that education-business partnerships represent a form of interorganizational linkage that has not been treated. In addition, while organizational culture has been referenced theoretically, few IOR studies appear to have focused on it. Consequently, our understanding about the social nature of these events, is scant.

Literature from the field of ‘Organizational Culture’ presents a diversity of views about and approaches to this complex phenomenon from a host of researchers representing different professional, epistemological and paradigmatic orientations. While this diversity continues to spawn much debate and discord, it is now being recognized that an understanding about culture needs to be informed through an appreciation of different perspectives. Martin and Meyerson have developed a framework with which to
undertake such a multi-perspective examination. However, this framework has not been applied in any longitudinal inquiry involving interorganizational configurations such as education-business partnerships.

In education, we have developed a rich understanding of numerous aspects of school ‘climate’ and their relationship and significance. However, few researchers have attempted ethnographic investigation of education’s organizational ‘culture’, and no examination has been made addressing organizational culture in the contentious locus of an education-business partnership.

Reviews of these four bodies of literature have revealed what I believe to be a significant gap in our cultural understanding about a phenomenon that has recently proliferated in both education and business. This study seeks, therefore, to improve our understanding of organizational culture in a complex IOR configuration - the systemic education-business partnership, in order to better inform the process of collaboration, and discussion and debate about this phenomenon.
CHAPTER III: Methodology

... to describe and explain culture in this IOR context

III:1 PURPOSE

III.1.1 Questions to be Addressed

This study seeks to explore organizational culture through the study of a systemic business-education partnership. Three questions are addressed:

1) How can organizational culture be studied in such a complex interorganizational relationship?

2) What characteristics of organizational culture or cultures can be revealed through such an examination?

3) What theoretical and practical implications might be drawn from the cultural findings?

III:2 LOCUS OF STUDY

III.2.1 Site Selection Rationale

The Metropolitan Toronto Learning Partnership (MTLP, later TLP) was selected as the site for the investigation. This not-for-profit entity, created in 1993, formalized the interorganizational relationship between Toronto's business community and its Public and Separate school boards. Funded by member organizations from business and education, MTLP was constituted to initiate and coordinate bi-sectoral efforts targeted to improve education in areas of concern established by the school boards.

As a locus of study, TLP offered a number of advantages. Because the partnership was system-wide, it represented a large interorganizational network, involving, within its first three years, over a hundred businesses and seventeen school boards. A partnership configuration of this magnitude did not appear to have been previously studied and described.

TLP represented a single focal point through which I could observe an array of partnership activities, in different stages of development. I could connect with a large and varied collection of cultural
informants from different organizational and hierarchical places within their own cultures; and with
different degrees and types of experience with the 'other' culture.

In most comparative analyses of culture, groups are studied in situ by a researcher, who moves
between or among the cultural sites and to whom cultural findings become apparent. In this case,
representatives from business and education have moved 'out of context' into a neutral space, where they
can be simultaneously observed as they collaboratively address the same tasks. And cultural comparisons
and findings may be evident, not only to the researcher, but to the participants involved in the interaction.

The site was locally accessible, allowing me the opportunity to pursue a longitudinal study. TLP's
management consented to my involvement in, and study of, their organization. No conditions were
attached to my involvement, and I was granted complete access to TLP files, meetings, and members.

Goetz and LeCompte report that ethnographic researchers often: “present themselves as having something
to offer participants, a means of reciprocating for data obtained” (1984:89). Therefore, as a gesture of
thanks, I offered to volunteer my assistance in a research capacity with one of TLP’s committees. My offer
was accepted.

III:3 APPROACH TO THE INVESTIGATION

III.3.1 Classifying the Research Approach

According to Goetz and LeCompte, the classification of any social science research as
'qualitative' or 'quantitative' is “inexact” and “artificial” (1984:6). They argue, in my opinion
persuasively, that rather than residing in one or the other of these mutually exclusive dichotomies, most
research can be located along a spectrum somewhere between them. They recommend that the orientation
of a particular research endeavor can be more fully articulated by considering it in terms of four
dimensions or “assumptive modes” : “inductive to deductive”, “generative to verificative”, “constructive to
enumerative” and “subjective to objective”.

Since no previous, parallel studies could be found that had focused on organizational culture in
public-private interorganizational contexts in general, or business-education partnerships in particular, I
reasoned that an 'inductive' approach was necessary. Any theoretical categories or propositions would be built on the data collected.

Although a few observations relating to organizational culture have been made in previous examinations of partnerships, particularly among corollary findings, there appeared to be a lack of previously developed propositions about organizational culture in partnerships which could be tested in my proposed cultural context. Any categories, therefore, under which TLP participant behaviors could be subsumed or compared could not be applied or verified from other sources. They had to be created or 'generated'.

However, as Cusick (1973) has pointed out, generative studies can be informed by theory. I could not deny that my conscious and probably sub-conscious mind has become acquainted with, and undoubtedly influenced by existing theories about the nature of organizational culture - in particular, the multiple-perspective view of culture advanced by Martin and Meyerson (1987) and Martin (1992). My intent was not to verify any existing notion, but to systematically generate a conceptualization of culture that, in this context: “accounts for much of the relevant behavior” (Glaser & Strauss, 1967). The data might lead me to that which had been previously conceived through studies of other types of contexts. It might not. The point, put by Glaser and Strauss (1967) was to try not to allow what I knew to “stifle” the possibilities. And, following Martin and Meyerson, to be open to the possibility that more than one conceptualization might be required to explain this cultural configuration.

I could not pre-determine, with any confidence, the units of analysis on which this study would be based. Therefore, I elected to follow a Goetz and LeCompte's 'constructive' strategy, which is: “aimed at discovering what analytic constructs or categories can be elicited from the stream of behavior; it is a process of abstraction in which units of analysis become apparent in the course of observation and description” (1984:5).

It seemed likely that, in this case, the lived inter-cultural experience of the informants would prove to be a rich mine of data, based on Hall’s notion that cross cultural encounters provoke greater self and cross cultural awareness. The data therefore, would be ‘subjective’, seeking to: “reconstruct the
specific categories that participants use to conceptualize their own experiences and world view" (Goetz and LeCompte 1984:6).

III.3.2 *Comparison to Ethnography*

Goetz and LeCompte contend that: "ethnographic research typically is located closer to the generative, inductive, constructive and subjective ends of the continua" (1984:4). In fact, this study incorporates many features by which a number of different researchers distinguish traditional ethnographic research. The context or site of the investigation is naturally bounded (Smircich, 1985). Its participants are drawn from a particular geographic area, and they have themselves elected to form an association. The group has not been manufactured arbitrarily by a researcher. My involvement in studying TLP has been of considerable duration - more than four years. The investigation therefore, has been long term and has involved continual residence at the site (Wax and Wax 1980). The data, collected by various techniques, is phenomenological, representing primarily the worldview of the participants; and it is empirical and naturalistic, involving, in addition to my own observations, direct accounts from those involved in a real world setting (Goetz and LeCompte, 1984). The data has been triangulated, in order to correct the bias that could arise from researcher-only observations, and to confirm the accuracy of individual perceptions against other sources (Glaser and Strauss, 1967). The study is preoccupied with both interpretive descriptions and explanations of the culture(s) (Wolcott, 1980). It constitutes 'writing about people' - the literal translation of the word 'ethnography'. Like all ethnographic research, this study has been emergent in nature. The establishment of 'a priori' construct or relationship assumptions has been avoided. And there has been a strong reliance on fieldwork because, as Goetz and LeCompte note: "although some phenomena can be identified and characterized as salient prior to entering the field, many others emerge only as the fieldwork progresses" (Goetz and LeCompte, 1984:69).

Although TLP is unique in many particulars, systemic partnerships between business and education and are not an unique phenomenon. A number of systemic partnerships involving business and education exist, and are emerging across North America from Ottawa to Louisville, and from New York
to Vancouver. And other types of interorganizational relationships have been reported to be multiplying throughout the western world. To ensure that the findings from this study would be useful for others, ethnographic techniques to provide for comparability and translatability of generated findings have been applied. To allow for comparability, the terminology and analytic frames have been designed to be non-idiosyncratic, and I have attempted to clearly delineate characteristics and constructs (Wolcott, 1973). To allow for translatability across groups and disciplines, explicitness has been sought in how characteristics, analytic categories and research methods have been identified.

On the basis of the above criteria, this study is representative of ‘ethnographic research’, an umbrella term under which Goetz and LeCompte include: “ethnography, qualitative research, case study research, field research, or anthropological research which may be said to follow an ethnographic approach” (1984:3). However, this study cannot be wholly constituted in either of the classical anthropological distinctions: an: “‘ethnography’ - the study of a phenomenon conceived of as an individual entity”; or: “an ‘ethnology’ - the comparative analysis of multiple entities” (Goetz and LeCompte 1984:13). This interorganizational context was not preconceived either as a single or multiple entity. I attempted not to preconceive it at all. Based on the notion of ‘grounded theory’ advanced by Glaser and Strauss (1967), the theory fitting this empirical situation has been arrived at: ‘a posteriori’.

### III:4 DATA AND INFORMATION COLLECTION TECHNIQUES

In their approach to the development of ‘grounded theory’, Glaser and Strauss emphasize the collection of different: “slices of data (such as field and survey data)” (1967:68), that should be seen, “not as tests of each other”, but, “as different modes of knowing”. They advocate an emergent approach, in which collection techniques are not pre-planned, but are employed as information needs arise. As the study progressed, to know more about TLP and the cultures involved in it, I found the need to employ:

- Informal fieldwork
- Document review
- Observation
- Participating observation
- Unstructured interviewing
III.4.1 Informal Fieldwork

The study began with informal fieldwork. I was introduced to TLP’s staff, committees and Board of Directors by the President and Program Director, who explained that I would be participating in the organization in order to research organizational culture for my Ph.D. dissertation. For a number of months I observed meetings, and held informal conversations with participants, learning how the organization and its committees operated, how people became involved with the partnership, and what they were working on. I also held individual conversations with those who wanted to know more about the pursuit of a Ph.D. These types of informal entry practices have been characterized by LeCompte (1969) as "shagging around" or by Schatzman and Strauss (1973) as "mapping"- efforts which serve to orient the researcher to the context, and allow the participants to become accustomed to the presence of a researcher.

III.4.2 Document Review

Files at TLP were made available for my review. These included: contact lists for board members, committee members, and sponsors; minutes which had been taken at every board and committee meeting; TLP newsletters; correspondence and records relating particularly to financial matters, financial reports, TLP conference brochures, project proposal documents, speeches, and a large quantity of magazine and journal articles relating to partnerships. After hearing that Charlie Frielsticker, the founding chairman of TLP maintained, at his place of business, his personal notes and records about TLP prior to its official incorporation, I asked for and was granted access to these materials. It was here that I located valuable material from which I could trace the origins of the organization, prior to my involvement.

III.4.3 Observation

Anthropologists such as Kluckhohn and Linton, and psychologists such as Freud identified bipolar distinctions in the people, phenomena and events they studied. There were things these researchers saw as explicit, overt and conscious. And there were those that they deemed implicit, covert or
unconscious. Hall observed that these bi-polar distinctions exist in the study of culture - that culture exists both ‘in’ and ‘out of’ the awareness of the participants.

While many cultural participants are ignorant of their cultural symbols and patterns, observation of their language and behavior, particularly in cross-cultural encounters, allows the researcher to see many of those explicit and implicit traits which serve to characterize a culture or sub-culture. Field notes recording the physical environment and the interaction and activities of participants in that environment provides data which facilitates verification: “that the individuals are doing what they or the researcher thinks they are doing” (Goetz and LeCompte, 1984:110). Consequently: “participant observation is the primary technique used by ethnographers to gain access to data” (Goetz and LeCompte, 1984:109).

Following Wax’s advice (1971), in order to correct bias and distortion in my fieldwork, I chose to interact with a diversity of participants, by attending all board, committee and staff meetings. In addition, I found that the meetings held on site at TLP were often the end-product of sub-committee work that had occurred at another education or business location. Valuable insights were gained from expanding my observational frame beyond TLP, into the ‘home turf’ of the participants.

The great difficulty in observing a cultural interaction is knowing what to look for. It takes a great deal of time to develop the ability to detect a cultural manifestation, and even longer to be able to label and describe it. Group interactions are fast-paced and complex phenomena to witness. And group encounters involving different cultures are even more complex to ‘sort out’. Fortunately, Goetz and LeCompte have developed some general questions to guide watching and listening, which I found to be very useful (see Goetz and LeCompte, 1984 : 112/113). Over time, as my cultural sensing mechanism became honed, I found less need for this reference, and a greater need to move from general to specific observation. For example, Goetz and LeCompte ask themselves the question: “what behaviors are repetitive?” to guide their observation of groups. This and all their questions are not only very general but appear to have been designed for a group conceived of as a single culture. In my case, after observing for some time, and reviewing the data collected, it appeared that different types of people were displaying repetitive behaviors, and that I needed to record not just the repetitive behavior, but (in some categorical way), the source of the behavior.
The amount of behavioral data recorded in my field notes from my first observation session to the last has followed the path of a normal distribution curve. Initially, very little is recorded, because little was apparent to me. With the help of Goetz and LeCompte and others, I was able to see and record, with every subsequent observation session, an increasing number of behaviors. A point was reached where a large number of extremely detailed behavioral notations appear. After that point, the amount of new, detailed behavioral information starts to decline. Notes begin to reflect, in shorthand form, repetitions of behaviors that had been previously observed and described. By the last sessions, I found that I was no longer describing, but confirming, by placing 'checkmarks' next to previously determined behavioral characteristics.

III.4.4 Participating Observation

While a breadth of cultural manifestations were becoming visible through observation, to deepen my understanding, I chose to expand my involvement in a particular committee. I reasoned that moving from an 'observer' to a 'participant-observer' role was necessary to achieve a dimension of understanding that could only be appreciated by actually being involved. TLP's 'Retention Committee' was in the process of recruiting volunteers for their 'Summer Institute Project'. My offer to conduct the research for this program was accepted. This proved to be a rich and rare research opportunity. The committee allowed me to audiotape all of the meetings during which these business people and educators planned their project. These discussions were particularly revealing for me, because their project was about: 'organizational culture' and 'change management'. During their deliberations about how to improve educators' understanding about 'organizational culture' and 'change', the committee members often exchanged insights about their cultures.

In my research work for this committee, I designed questionnaires to gather formative and summative evaluations from attendees to a four-day workshop on culture and change which had been designed and delivered by the committee. This information was used to identify elements of the curriculum that served participant needs, and those which needed to be revised or replaced. Following the
workshop, held at the Bank of Montreal’s Institute for Learning, school participants, with the assistance of their business partners, embarked on a year-long change initiative of their choice back at their schools. Later in the first year of the ‘Summer Institute’, I was able to re-connect with some of the school/business teams to record their post-workshop experiences. In subsequent years, the videotaping facilities, equipment and staff from the Bank of Montreal’s Institute for Learning, a major funding partner in the project, were put at my disposal to record the workshop sessions, and to conduct taped, post-change interviews with the teams at school sites. It was a marvelous opportunity to simultaneously satisfy the committee’s research requirements while concurrently informing my own dissertation.

Acting as a ‘participant-observer’ served to deepen my understanding of the business and education members of this committee as I participated with them in managing ‘our’ project, reflecting on the results, and revising plans for the ensuing years. I was able to more intimately view how business people and educators dealt with, and collaborated on, a joint initiative. I observed how language and behaviors changed as a result of prolonged mutual exposure. I witnessed how individuals from various hierarchical positions from each sector reacted in a group of school personnel, how they reacted in a group of business people, and how they were received.

The ‘participant-observer’ role also allowed me to expand my observational frame beyond TLP. Over three years, I witnessed hundreds of people from schools and businesses talking and learning about organizational culture in general, about their own cultures, and about each others’ culture. I saw them laugh and joke about themselves and each other. I saw misconceptions that one organizational culture can have about another. And I saw the perplexity and anger that cultural conflict can precipitate. From this intimate contact, I was able to expand and refine existing cultural categories gathered through observation alone; add new categories; and gain insights into cultural circumstances, beliefs and assumptions that underpinned visible behaviors. This role allowed me to do something I couldn’t do through observation alone - to interrupt and ask: “why do you do that?”, or, “what was your reaction to (a certain behavior)?”, followed by: “why do you think you and your colleagues would react like that?”
III.4.5 Rationale for Interviewing

Pelto and Pelto (1978) observed that modern (and presumably post-modern) social scientists do not rely exclusively on observation. Although many researchers differentiate between participant observation and in-depth ethnographic interviewing, Lofland (1971) believed that the two methods go hand-in-hand, and he remarked that many of the data gathered through observation are often derived from formal interviewing in the field. What interviewing can do that observation cannot, according to Patton, is:

...find out from them those things we cannot directly observe...feelings, thoughts and intentions. We cannot observe behaviors that took place at some previous point in time... in situations that preclude the presence of an observer. We cannot observe how people have organized the world and meanings they attach to what goes on in the world...The purpose of interviewing, then, is to allow us to enter into the other person’s perspective (1980:196).

Taylor and Bogdan have advised that interviewing is the method to be selected to obtain: “a broad picture of a range of settings, situations or people”, allowing the researcher to study: “a relatively large number of people in a relatively short period of time” (1984:79).

Following almost two years of ‘shagging around’, document review, observation, and participant-observation, it became apparent that while a significant amount of data had been collected, these research techniques had proved limited in their ability to reveal the cultural perceptions held by educators and business people about themselves and each other. In order to obtain more perceptions than my participating-observer role in one small committee could provide, I decided to pursue individual interviews, a notion that was met with a positive response by TLP management and by a selection of informants to whom I had advanced the idea.

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III.4.6 Interviewee Selection Criteria

Meriam speaks to the need to identify and involve 'informants' in sociological investigations, defining this type of respondent as: "one who understands the culture but is also able to reflect on it and articulate for the researcher what is going on" (1988:75). Identified through criterion-based or purposive sampling (Manheim, 1977; Patton, 1980), key informants should be able to relate: "the experiences and perceptions of people having different associations with the program" (Meriam, 1988:75). According to Dexter (1970), "informants" are "elite respondents" - those with specialized information whose perspective on the situation is of interest to the interviewer.

Six factors were considered in selecting the informants who would constitute my slate of interviewees:

- the number of people involved in TLP;
- the extent and nature of their involvement in TLP;
- the variety of different types of organizations represented by each sector;
- the geographical location of the above organizations;
- the variety of different functions and hierarchical positions held by individuals from each sector;
- recommendations

The Learning Partnership represents a transactional task zone within which hundreds of individuals gather together in various group configurations. Time constraints prohibited interviewing everyone involved in TLP2. In addition, I made the assumption, based on observation, that selection criteria based on a single dimension or organizational strata from each sector would not reveal the extent to which those perceptions were reflected throughout the respective sector. Consequently, I needed to identify the different groups that composed TLP, and ensure that I had representatives from each of these groups on the interview slate.

At The Learning Partnership, a number of different cross-cultural group configurations have been assembled. At the TLP executive committee, board of directors, and operating committees, representatives of education and business were observed to meet regularly over an extended period of time.

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2 On the TLP board and committees there were a few individuals who did not represent the sectors upon which this dissertation is focused - business and public education. The number of these 'others' (such as those representing a community constituency or those from higher education) proved insufficient to merit attention in this dissertation.
For some projects and events such as the annual conference, the interaction period proved to be short for attendees and longer for those involved in program design and presentation. And there have been occasions where groups from one or both sectors have been assembled for a single consultation about a specific issue. The composition, role and function of each of these configurations was observed to be different. Therefore, to access perceptions from throughout TLP required that interviewees be drawn from a variety of configurations and that any one group - for example, the board, or a single committee should not numerically dominate the interview slate. In addition, I reasoned that cross-cultural perceptions rendered by people who had extensive exposure and working experience with a number of representatives from the ‘other’ sector, would prove more rich and reliable than perceptions put forward by those whose cross-cultural exposure and experience was limited.

A review of TLP board and committee participant lists revealed that business and education participants occupied many different functions and hierarchical positions in their organizations. From the education sector, three types of organizations predominated: the ministry, boards and schools. Three types of school boards were represented: the Metro board, Public school boards and Separate school boards. Business sector representation covered a variety of industrial, retail, and service firms from both big and small business. These education and business organizations were geographically situated in various locations across the numerous cities and boroughs that compose the Toronto GTA. With the input of informants from both sectors, I identified a selection of types of organizations, job titles, and municipal localities that could justify the claim of being ‘representative’ of those involved in TLP during the time this study was conducted.

In observation notes I had targeted specific individuals who had displayed characteristics and opinions during meetings that stimulated my interest in engaging them in an individual conversation. In addition, TLP staff, Summer Institute committee members, and interviewees themselves recommended candidates they believed could provide valuable insights. These recommendations served not only to fulfill one or more of the selection criteria I had established. They also served to broaden, in a meaningful way, the scope of the study. For example, numerous informants suggested that two important voices lacked representation in the preliminary interview slate and should be heard from - teachers and federation
officials. Having observed how important teachers were in the adoption and implementation of TLP initiatives, and having witnessed some picketing by federation representatives at the first TLP Conference, I agreed with these recommendations and expanded the slate accordingly. Each of these groups was part of the education culture, and I felt that data they could supply concerning TLP and business-education partnerships would be relevant to categories I was developing.

III.4.7 Slate of Interview Candidates:

In addition to formally interviewing 5 TLP staff members, the final slate of non-staff interview candidates listed 51 individuals including: 29 educators, 19 business people, and 3 union/activitists.

To detect and correct distortion, I spoke with at least three people from any single job category.

Titles of interviewees from the education sector included:

- 3 Ministry Officials
- 3 Trustees
- 4 Directors of Education
- 3 Superintendents
- 3 Board Consultants/Coordinators
- 7 Principals
- 3 Department Heads
- 3 Teachers

These 29 people collectively represented: the government ministry, the Metro board, Public and Separate school boards and schools covering 6 cities in the GTA. Each of these people had been involved at TLP as members of: the staff, the executive committee, the board, various committees, and the annual conference. In addition, each one of these people had experience interacting with a wide variety of business people in a number of partnership initiatives.

Titles of interviewees from the business sector included:

- 3 Big Business Presidents
- 2 Big Business Vice presidents
- 4 Big Business Line Managers
- 3 Big Business Staff Managers
- 4 Small Business Presidents
- 3 Business Employees
These 19 people collectively represented both big and small business, covering the following industries: banking, beauty supplies, communications, engineering, financial services, grocery and food services, health care, high technology, not-for-profit, office equipment, oil & gas, publishing, research and management consulting, resource development, and the media. In terms of their involvement in TLP, these people collectively occupied positions on: staff, the executive committee, the board, various committees, and the annual conference. And each one of these people had experience with a wide variety of educators in numerous partnership initiatives.

In addition, interviews were conducted with 3 union official/activists, each of whom had experience with both educators and business people in partnerships. Each was directly familiar with the work of The Learning Partnership.

III.4.8 Rationale For Selection of the Unstructured Interview Technique

Among interviewing options available, I elected to employ the unstructured interview. In this interviewing technique: “there is no predetermined set of questions and the interview is essentially exploratory” (Meriam, 1988:74). The use of the less structured form of interview, according to Meriam (1988), follows the assumption, central to this dissertation, that individual respondents may not define the world in the same ways. Patton viewed the purpose of the unstructured interview: “not to put things in someone else’s mind (for example, the interviewer’s perceived categories for organizing the world), but rather to access the perspective of the person being interviewed” (1980:196). Since the respondents might well not have a common vocabulary; questions could not be devised that would be equally meaningful to every respondent; and the context in which the question would be put might not hold a common meaning.

Moreover, I had determined that the amount of information available about the study of organizational culture in a partnership configuration was insufficient to support the design of specific questions.
III.4.9 How the Interviews were Conducted

Each interviewee was told that the purpose of our conversation was to gain information for my
Ph.D. dissertation which concerned the study of organizational culture through partnership. In addition, I
requested the opportunity to tape-record the interview, and advised the interviewee that s/he would
receive a written transcription of the interview to review, together with a written consent agreement
authorizing me to use their words in the dissertation.

I indicated that I was interested in three issues:

• how had the interviewee become involved in The Learning Partnership?;

• what was the nature of her/his involvement?; and,

• based on her/his involvement with business and education at TLP, what, if any, similarities and/or
differences had they noticed between the organizational cultures?.

For the purpose of obtaining historical information about the development of ‘partnerships’ in
Canada, certain interviewees who held positions that had allowed them to witness its development were
additionally requested to provide their perceptions about how this phenomena arose in Canada, and in the
Toronto GTA.

Interviews were audiotape-recorded during face-to-face meetings in the workplace of the
interviewee. Since this study concerned different workplaces, I believed that direct observation of these
workplaces and observations of the interviewees in their own contexts would be important. In six cases,
due to interviewee time limitations, and technological opportunity, the interviewing pattern had to be
changed. Two interviews were tape-recorded by telephone. And four interviews were video taped at a
location different from the interviewee’s workplace. In each of these exceptional cases, I paid a subsequent
visit to observe the interviewees in their workplaces.

According to Polkinghorne: “the length of the interview depends on both the amount of self-
reflection the participant feels comfortable with and the topic of study” (1989:48). Initially, the time
requested for the interviews was one hour. However, very few interviewees demonstrated body language
after a one hour period that would signal the need to bring closure. As a result, the average length of interviews turned out to be approximately 1h20m for business people, and well over 2h for educators.

Electronic recording was selected for four reasons. First, my experience in interviewing has revealed to me that I have difficulty simultaneously maintaining a focused concentration on what is being said, and attending to its faithful recording, especially when the interview is unstructured. Second, I have observed that the raw data collected by researchers who conduct large numbers of similar interviews progressively appears shorter and less precise due, I believe, to researcher fatigue. Third, preliminary interviews demonstrated that the technology did not appear to interfere with the process. Fourth, each interviewee knew that they would have the opportunity to review and edit the written transcript of the conversation which, I think, made them more comfortable during the interview.

III.4.10 Authorization Procedures and Reactions

Transcripts of the conversations were prepared, and were delivered to the interviewees for review, together with their official consent agreements. I firmly believe that interviewees deserve the right to edit their interviews. I had met with and, in many cases, worked with these people for a long period of time. I believed that the level of perceptual honesty I could expect from them was directly proportional to the amount of trust they felt in how I would treat their perceptions. While I was familiar to them and not an, ‘unknown with an unknown agenda’, in my experience what you say and how it looks on paper, can differ. And it was apparent in the observation stage that many of the senior people I would be interviewing had, in their opinion, been ‘misquoted’ in the past.

In all but a very few cases, the transcripts were returned with no change, or with a very few, minor grammatical changes. In one case, the grammatical changes made by the interviewee were extensive, but the content remained the same. In another, one significant issue was deleted, however this issue proved to be a specific example of a characteristic that surfaced in other ways, through other interviews. In two cases, the interviewees expressed a concern that their words, which, to them, had felt coherent when spoken, appeared to be incoherent when transcribed into print. They asked me to amend
the grammar, where I deemed appropriate, adding, for example, pronouns that had been omitted in speech. Two interviewees authorized the use of their names and words for the purpose of the Ph.D. dissertation, but requested the opportunity to review the use of their material for any subsequent publication.
III.5 TREATMENT OF THE DATA AND INFORMATION

III.5.1 The Need for Two Presentation Treatments

A preliminary review of the transcripts revealed the presence of two distinctly different types of references - 'categorical' and 'particular'. There were passages referencing specific cultural similarities and differences that interviewees had noted from their partnership involvement. These represented 'data', defined in the Oxford Dictionary as: “known facts or things used as a basis for inference or reckoning” (Thompson, 1995:341). This interview data, together with related data collected through other techniques could be categorized, summarized and compared in a systematic way, leading to the development of explanatory theory.

In addition, there were passages that referenced The Learning Partnership, including particular details about its development and operation. Passages about The Learning Partnership represented 'information', defined as: “something told”...“items of knowledge”...“news” (Thompson, 1995:698). Informants presented this news in the form of narrative sketches that brought to life a specific group of people who had experienced a particular, sequential unfolding of events and actions. These perceptions, together with other particular information gleaned from observation, participating-observation and document review, could be consolidated and assembled into what, in fact, it was - 'a story', narrated primarily through the named voices of those who were involved. Through this approach, the sequence of events, the personalities, the scenes in which they interacted, and their feelings could be rendered more effectively than by deconstructing the material into an anonymous data collection for analysis.

As this investigation progressed, the notion that this context would be presented only by means of data in the form of categories and properties became, somehow, profoundly unsatisfactory. To reflect only the divisible nature of this partnership would be to offer up a one dimensional picture of the multi-dimensional phenomena that organizational culture is. I came to the conclusion that to achieve congruence between the nature of the context and how it was approached and presented, I needed to both describe and explain it as fully as possible - to capture a nature that was, at the same time, unitary as well as divisible. Did a single approach exist that would allow me to do deal with the categorical and the
particular, concurrently? Apparently not. As Bruner pointed out: “there is an irreconcilable difference between causal-explanatory and interpretive-hermeneutic approaches to how we understand our own and others’ minds” (1996:102). But, he added, and I would concur: “I believe that the two modes of knowing are irreducibly different but complementary” (1996:111). Therefore, making meaning about organizational culture in this context could, and, to my mind, should be undertaken by employing both approaches to reveal the unitary nature of the context and its diversity.

III:6 MANAGING THE PARTICULAR INFORMATION

III.6.1 Information Processing

It appeared to me that the structure of my ethnographic narrative about The Learning Partnership should be influenced by two primary features of this context. TLP was officially in its first full year of operation when I entered the scene. This presented an opportunity to describe the development and first few years of a greenfields operation, which might prove useful to others seeking to develop a systemic partnership. And it became apparent that this wasn’t just the story of an organization, but the chronicle of the vision and efforts of one man. Therefore, rather than concentrating, as many ethnographies do, on developing reader identification with the ethnographer, I decided to focus on the founder who has been the constant and unifying force through which the story has unfolded. In addition, this story ‘belonged’ to those involved, and so I wanted to expose the reader directly to them, as much as possible, by using their own words. I began by collecting information from field notes, document photocopies and interview quotes into consecutive time periods - from the period that immediately preceded (and contributed to) the development of a systemic partnership in Toronto, to the point when the founder relinquished his leadership position in the fully fledged partnership. I really cannot explain how I translated this raw, dislocated information into a relatively coherent narrative form. The information went into my eyes, came out of my fingers, I lost all track of time, and I cursed a lot during the editing. The story of The Learning Partnership appears in Chapter IV of this dissertation.
III: 7 MANAGING THE CATEGORICAL DATA

III. 7.1 Categorizing the Interview Data

Through a process of coding, the interview data was categorized into cultural categories, or general subjects. Under each of these categories (like ‘time’) all similar or different cultural characteristics could be subsumed for analysis. In 1967, when Glaser and Strauss described their: ‘constant comparative method of qualitative analysis’, they did not suggest how to do this using a computer. The coding of qualitative data today can be done by using the software package titled: NUDIST, 

which stands for: ‘Non-numerical, Unstructured Data Indexing for Search and Theory Building’. Not all graduate students, however, can afford the many hundreds of dollars in licensing fees that must be invested to gain access to this software. Consequently, I decided to identify how the computer coding could be accomplished using Microsoft Word, which students may be able to access free of charge.

Using Microsoft Word, each entire interview transcript was copied into a different computer file to separate and protect the original interview from that which would be processed. Each transcript copy was reviewed. Figure #1 shows how a section of a particular interview was treated.

**FIGURE #1**

<table>
<thead>
<tr>
<th>INTERVIEW #4E</th>
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<tbody>
<tr>
<td>#4E: Quote #5</td>
</tr>
<tr>
<td>CATEGORY: DECISION-MAKING</td>
</tr>
</tbody>
</table>
| “Many decisions made by Boards are ultimately business decisions”... “For example, a plan for computerizing the office, the school offices... Staff would have to first of all present the case as being a point in which ‘X’ number of hours would be saved by manually writing out the things that could then, you know, that could be done by machinery if the computers were put in, and then rationalize the number of hours saved in terms of dollars saved, and then, putting that in the cost benefit analysis against the costs of the computers themselves and you know, the long term costs of maintenance or repairs of the computers and that sort of thing”.

| #4E: Quote #6 |
| CATEGORY: TIME |
| “...with business, the meetings start quite predictably at the time they’re supposed to start and they usually end quite predictably at the time that they are supposed to be ending, and that certainly happens at the Learning Partnership committee meetings”... “With education, things aren’t so cut and dry. People will hang around and wait for others before they start the meeting and sometimes issues come up that need discussion in great depth and detail, they will go ahead and discuss it in great depth and detail regardless of the time that it takes”.

A number and letter was substituted for the name of the interviewee: ‘Interview #4E’ represents the fourth interview conducted, which involved a person from education. This was done so that my focus on ‘what

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3 A humorous though appropriate title for a practice which reduces material down to its ‘bare essentials’
was said' was not complicated by any particular thoughts about 'who said it' at this stage. Material that was not deemed to be 'relevant data' was deleted - for example, the 'how do you do's', and my questions (unless required for understanding the response).

The remaining responses were physically separated by spaces into 'quotes'. Each quote dealt with a particular category. Each quote was numbered - i.e. 'quote #5' was the fifth quote in the interview. Each quote was titled with the interviewee number, the quote number, and a category code name which was abstracted from the language of the interviewee. In the first quote shown in exhibit #1, for example, the interviewee used the word 'decision' and the passage appeared to relate to the category of 'decision-making'. In the next quote the interviewee spoke about 'time' and this term was used as the category code name. Titling each passage with its interviewee and quote number would allow me to easily locate the quote in its original context. And identifying the category code name facilitated the process whereby all quotes relevant to a particular category could be identified and electronically collected together.

I should mention that Microsoft Word offers a 'bookmark' function which would appear to facilitate the collection of similarly coded information. However, the 'bookmark' function did not help in this case. You cannot give all bookmarked text a similar, general category identification, i.e. 'decision-making'. Each piece of text to be bookmarked requires a different identification - for example, 'decision-making 1' for the first passage that related to 'decision-making', and 'decision-making 2' for the second, etc. With a large quantity of data, after a while, it becomes more time consuming to keep track of what numbers have been used and what number should come next, than to just type the dimension name over the passage and 'edit, delete' the passage into another file where all the quotes relating to 'decision-making' will be collected. I have formally communicated with Microsoft headquarters requesting that they consider developing a general bookmarking function so that qualitative researchers, or others could define pieces of text and have them automatically assemble under a single, general heading.

For each category, an individual computer file was created. Every quote from each interview was electronically cut and pasted into its appropriate file.

As Glaser and Strauss (1967) point out, data coding is not a 'one time' exercise. Categories are added, deleted, consolidated and refined based on a continual process of comparison between the quotes
being added, and the quotes already pasted. During the coding process, following Glaser and Strauss' advice, I recorded my "musing over theoretical notions" in order to "relieve conflicts" that arise in "the emphasis of (one's) thinking" (1967:107). I created a separate file for this purpose. The Microsoft Windows application allowed me to quickly access the 'musings' memo file, record a theoretical notion, and revert to the dimension file on which I had been working.

Ultimately, all of the data was coded into fourteen (14) files, covering the following categories:

- Competition
- Decision-Making
- External and Internal Relationships
- Financial Matters
- Performance and its Measurement
- Power & Authority
- Professional Development
- Promotions & Reward Systems
- Risk-taking
- Roles & Responsibilities
- Stakeholders
- Time
- Transformation & Change
- Verbal & Non-verbal Communication

III. 7.2 Editing Transcript Data

Figure #2 gives an example of how the quotes were edited. Extraneous or duplicated references were deleted. Long comments were shortened. Every effort was made to retain the integrity of the passage including as many of the exact words and key phrases as possible.

FIGURE #2

#4E: Quote #5
CATEGORY: DECISION-MAKING

ORIGINAL QUOTE:

"Many decisions made by Boards are ultimately business decisions"... "For example, a plan for computerizing the office, the school offices. Staff would have to first of all present the case as being a point in which 'X' number of hours would be saved by manually writing out the things that could then, you know, that could be done by machinery if the computers were put in, and then rationalize the number of hours saved in terms of dollars saved, and then, putting that in the cost benefit analysis against the costs of the computers themselves and you know, the long term costs of maintenance or repairs of the computers and that sort of thing".

#4E: Quote #5
CATEGORY: DECISION-MAKING

EDITED QUOTE:

"Many decisions made by Boards are ultimately business decisions" made on the basis of "cost benefit analysis"
III.7.3 Developing a Framework

Even after editing, I found that each of the category files contained a huge quantity of quotes. Further review revealed that four types of perceptions were present in each category:

- perceptions about business by business
- perceptions about education by education
- perceptions about business by education
- perceptions about education by business

And, four types of cultural forms were represented:

- perceptions about physical attributes - what things and people ‘look like’
- perceptions about language attributes - what people ‘say’
- perceptions about practice attributes - what people ‘do’
- perceptions about opinion attributes - what people ‘think’

Figure #3 shows the headings and layout of two frameworks that were created, based on the above observations, by employing the Microsoft ‘Table’ function. For every category, each of the quotes was cut and pasted into its appropriate cell. Then, quotes that were saying the same, or virtually the same thing were grouped together. In addition, related data collected through document review, observation and participant-observation were added.

**FIGURE #3**
Working with two separate frameworks for each category proved to be cumbersome. What I needed was a single, more simplified framework to facilitate comparative analysis of the data. Through a process of trial and error, what seemed like hundreds of different summary framework configurations were attempted, critiqued, sworn-at, ripped up, and thrown out. Finally, I found a design that summarized a vast quantity of data into a form, as simple as possible, that would facilitate data analysis. This framework, whose headings and design is illustrated in Figure #4, records cultural forms under three major headings (alphabetically ordered): ‘Business’, ‘Education’, and ‘The Learning Partnership’.

**FIGURE #4**

<table>
<thead>
<tr>
<th>DECISION-MAKING</th>
<th></th>
<th></th>
<th></th>
<th>CROSS-CULTURAL JUDGMENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>FORMAL PRACTICES</td>
<td>INFORMAL PRACTICES</td>
<td>BELIEFS</td>
<td>EXCEPTIONS</td>
<td></td>
</tr>
<tr>
<td>BUSINESS</td>
<td>data about business</td>
<td>data about business</td>
<td>data about business</td>
<td>data by business about education</td>
</tr>
<tr>
<td>EDUCATION</td>
<td>data about education</td>
<td>data about education</td>
<td>data about education</td>
<td>data by education about business</td>
</tr>
<tr>
<td>THE LEARNING PARTNERSHIP (TLP)</td>
<td>data about TLP</td>
<td>data about TLP</td>
<td>data about TLP</td>
<td></td>
</tr>
</tbody>
</table>

Under ‘Business’ and ‘Education’, I was able to capture all the data under five (5) cultural forms:


- ‘Formal Practices’ worked as a more inclusive title under which to subsume not only physical cultural forms, but operating structures, and practices established by regulation and tradition. These represent, if you will, the official ‘state of affairs’.

- Under ‘Informal Practices’ I could include language, behaviors, and myths and stories⁴ - linguistic forms used to underscore particular behaviors.

- Under: ‘Beliefs’, opinions, attitudes, values and meanings about one’s own culture were recorded including, as well, myths and stories⁵ which underscored some belief.

---

⁴ Too few myths and stories were presented by informants to warrant a separate column. In addition, these were found to underscore either a particular behavior or a particular belief. Consequently they were subsumed under the form whose purpose they illustrated.

⁵ See footnote above
There were quotes and other data which referenced specific groups or situations where different-than-general norms were noted to be followed. These were recorded under the title: 'Exceptions'.

And to capture statements of opinion or criticism about the 'other' culture’s formal practices, informal practices, or beliefs, the heading 'Cross-cultural Judgments' was created.

For data relating to 'The Learning Partnership' only three categories were required to capture the data: 'Formal Practices', 'Informal Practices' and 'Beliefs'.

After all the data had been electronically pasted into its appropriate category framework there was still too much data to manage. However, I realized that I couldn't simplify the framework further until I further simplified the data.

III. 7.4 Generalizing the Data

Glaser and Strauss point out that: "to master his data, (a researcher) is forced to engage in reduction of terminology"(1967:114). With all of the data in summary frameworks, this process of generalization could begin: to reduce related data into pithy encapsulating statements. As this was occurring I found the need to add much more theoretical musing to the file created for that purpose. And often, to move back and forth between data in the category frameworks and the particular information located in the story of the Learning Partnership. The categorical did play out in the particular, and the particular did assist in underscoring the data with meaning.

Each of the framework files was replicated, to save the 'original', and to produce a 'working' file for the generalization process. In each new 'working' category file, similar data were grouped under a generalized 'headline'. The headline was composed of the two references present in most informant quotes - reference to an issue about a category; and a characterization about that issue. For example, although they were all voiced differently, a very large number of quotes essentially said that in education: 'Decision-Making Time is Lengthy. In this case each quote dealt with the category of 'time' and with the issue of 'decision-making time'. And each quote characterized this in education as 'lengthy'.

Headlines were created only around data that could be triangulated in three ways:

- with other interview data from the same sector (i.e. numerous educators (or business people) said it)
• with other interview data from a different sector (i.e. both educators and business people said it)
• and with data collected in other ways (i.e. it I observed it)

Eventually, in the 'working' files, only the generalized headlines were retained for the formal practices, informal practices and beliefs. However, the judgments proved to be too complex to generalize. Therefore, the only treatment applied to the judgments was to carefully edit out any repetitions. Figure #5 demonstrates the result of the generalization process for the category of 'Time'.

**FIGURE #5: ‘TIME’ NORMS**

<table>
<thead>
<tr>
<th>FORM</th>
<th>ISSUE</th>
<th>TLP NORM</th>
<th>BUSINESS NORM</th>
<th>EDUCATION NORM</th>
<th>EXCEPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Formal Practice</td>
<td>Outcomes Realization Period</td>
<td>-Short Term for financial outcomes -Longer Term for non-financial outcomes</td>
<td>Short Term</td>
<td>Long Term</td>
<td>B - CEO's and HR also focus on longer term B - Outcomes are realized more slowly in big business than in small firms</td>
</tr>
<tr>
<td>Formal Practice</td>
<td>Decision-Making Time</td>
<td>-Short for policy/ project selection -Lengthier for project implementation</td>
<td>Short</td>
<td>Lengthy</td>
<td>*</td>
</tr>
<tr>
<td>Formal Practice</td>
<td>Formal On-The-Job Time</td>
<td>Longer than Education</td>
<td>Longer than Education</td>
<td>Shorter than Business</td>
<td>E - Longer than Education at Boards</td>
</tr>
<tr>
<td>Formal Practice</td>
<td>Demographic Temporal Orientation</td>
<td>Adults</td>
<td>Adults</td>
<td>Children</td>
<td>E - Boards are oriented to Adults</td>
</tr>
<tr>
<td>Informal Practice</td>
<td>Role &amp; Place Turnover</td>
<td>- Relatively Low for staff -High for volunteers -Low but rising for financial supporters</td>
<td>High</td>
<td>Low</td>
<td>E - high place turnover for Principals, VP's, and lower level Board people</td>
</tr>
<tr>
<td>Informal Practice</td>
<td>Sense of Urgency in Language &amp; Behavior</td>
<td>High</td>
<td>High</td>
<td>Low</td>
<td>*</td>
</tr>
<tr>
<td>Informal Practice</td>
<td>Concern for Time Management at Meetings</td>
<td>High</td>
<td>High</td>
<td>Low</td>
<td>E - higher among Board people</td>
</tr>
<tr>
<td>Informal Practice</td>
<td>Investment of Personal Time On-The-Job</td>
<td>Expected</td>
<td>Expected</td>
<td>Discretionary</td>
<td>E - Expected for Board people and those seeking promotion</td>
</tr>
<tr>
<td>Belief</td>
<td>Rationale for Time Orientation</td>
<td>The Time Frame Needs of Business and Education are Different and Must both be Accommodated</td>
<td>The Need for Decisiveness calls for Short Time Frames</td>
<td>The Need for Deliberation requires Long Time Frames</td>
<td>*</td>
</tr>
<tr>
<td>Belief</td>
<td>Criteria for ‘working hard’</td>
<td>-Time and Resource Related</td>
<td>Time-Related</td>
<td>Function-Related</td>
<td>*</td>
</tr>
</tbody>
</table>

- The time Educators take at meetings, and to make decisions, is frustrating
- Educator’s formal on-the-job time and discretionary personal time investment at work does not represent “real life”
- Educators don’t work very hard
- Educators are “lazy”

- In Business, your working day is your life
- Business people are impatient and have short term time expectations
- Business people focus their time on performance over relationships
Figure #6 removes the characteristics from Exhibit #5 in order to demonstrate the general format.

FIGURE #6

While these frameworks, all following the same format, proved to be valuable tools for me to use in the analysis stages of this examination, some test readers found them difficult to understand without explanation. Therefore, I used these frameworks, not only by which to conduct the analysis, but also as guidelines for the production of a full text explanation for each category. These explanations, which provide a ‘categorical’ look at TLP and its constituents, may be found in CHAPTER V.

III.8 ANALYZING THE DATA AND INFORMATION

III.8.1 Moving Beyond Description

At this stage of the examination I had arrived at two descriptions of TLP - one particular, and one categorical. In addition, I had produced an electronic journal of theoretical ‘musings’ during the process of managing these data and information. But as my journal notes made clear, moving from description to explanation would not be an easy task. A review of the data even in its most simplified form produced not one but many ‘aha!’s’. As many cultural researchers before me had found, a single, overarching conception of culture to account for all of the data and information eluded me.
On the basis of the question: 'if there is no big picture yet, are there little pictures?', I began to analytically deconstruct the data and information I had so carefully constructed. The data was subjected to nine (9) stages of analysis until all the data was accounted for. Each stage unpacked different constellations of characteristics - specific formal practices, informal practices, and beliefs or judgments from all of the fourteen categories that connected into a recognizable pattern. The constellations identified in each stage were electronically cut and pasted into tables which may be found in the APPENDIX. These tables juxtaposed related constellations attributed to different cultural loci to facilitate comparison. The contents of these tables is discussed in detail in CHAPTER VI of the dissertation.

It is important to stress that while it was the data that was treated, the particular information was consulted during each stage of the analysis. In numerous instances particular information, such as an event, an interaction or a change over time reported in the story of the Learning Partnership, informed an analytical approach to be taken with the data.

III.8.2 Deconstructing the Data into Constellations Of Characteristics

**STAGE 1 OF THE DATA ANALYSIS**

From all fourteen categories, the characteristics attributed to TLP alone were culled and classified. The objective was to determine if a consistent and pervasive constellation of characteristics could be found that was unique to TLP, which set it culturally apart from its constituent organizational cultures. That analysis can be seen in APPENDIX, TABLE #1.
STAGE 2 OF THE DATA ANALYSIS

The search for pervasive, consistent constellations of characteristics that would define a 'culture' was continued by addressing the business columns for each category, followed by a review of the education columns. The data about business was juxtaposed against the data from education in APPENDIX, TABLE #2. This juxtaposition served to illuminate the extent of difference between the cultures thus establishing how unique they were perceived to be.

STAGE 3 OF THE DATA ANALYSIS

APPENDIX, TABLE #3 became the repository for the judgments advanced by educators and business people which were juxtaposed in order to determine how the judgments related to cultural norms.
STAGE 4 OF THE DATA ANALYSIS

While the pervasive and consistent characteristics had been accounted for, the exceptions remained. In the case of TLP, the first analysis of its characteristics had just dealt with those that were different from both business and education and defined TLP's uniqueness. This stage focused on the characteristics where TLP mirrored business and where it reflected education. These, in juxtaposition, can be seen in APPENDIX, TABLE #4.

STAGE 5 OF THE DATA ANALYSIS

Pursuing exceptions further, those perceived about education were juxtaposed against education norms to illuminate the locus and nature of the difference. This analysis was captured in APPENDIX, TABLE #5.
**STAGE 6 OF THE DATA ANALYSIS**

<table>
<thead>
<tr>
<th>CATEGORY TITLE</th>
<th>FORM</th>
<th>ISSUE</th>
<th>TLP</th>
<th>BUSINESS</th>
<th>EDUCATION</th>
<th>EXCEPTION</th>
</tr>
</thead>
</table>

Characteristics ascribed to business in general were juxtaposed against its characteristic exceptions in APPENDIX, TABLE #6 to identify the locus and nature of difference.

**STAGE 7 OF THE DATA ANALYSIS**

<table>
<thead>
<tr>
<th>CATEGORY TITLE</th>
<th>FORM</th>
<th>ISSUE</th>
<th>TLP</th>
<th>BUSINESS</th>
<th>EDUCATION</th>
<th>EXCEPTION</th>
</tr>
</thead>
</table>

In this analysis both the norms and the exceptions ascribed to education were juxtaposed against business norms. The objective was to identify if there were any similarities between the sectors and the locus or loci of the similarity. This analysis appears in APPENDIX, TABLE #7.
**STAGE 8 OF THE DATA ANALYSIS**

In APPENDIX, TABLE #8 analyzes the categorical data - the norms and exceptions of business and education that relate to change, a theme that repeatedly surfaced in the particular information. This analysis moves beyond the identification of the loci of similarity established in stage #7, to explore the nature of the similarity between education and business.

**STAGE 9 OF THE DATA ANALYSIS**

In this stage all of the data was consolidated into one table (see APPENDIX, TABLE #9). This table, together with the particular information presented in the story about The Learning Partnership (see SECTION IV) was reviewed, to inform a discussion about some things that defied pattern-recognition. These anomalies were analyzed to attempt to explain them.
III.8.3 Finding a Theoretical Interpretation Based on the Analyses

A tenth stage of analysis was undertaken in this examination - analysis of the nine stages that had come before. A review of the nine tables in the APPENDIX revealed six constellations, not of cultural characteristics, but of cultural viewpoint. These constellations represented different conceptions of culture, each applying a different focus or lens on the data and information. These conceptions represent the theoretical explanation that was sought from this examination of an empirical phenomenon. Descriptions of these six conceptions appears in CHAPTER VI of this work.

III.8.4 Responding to the Original Questions Posed

This study sought to address three questions:

1) How can organizational culture be studied in such a complex interorganizational relationship?

2) What characteristics of organizational culture or cultures can be revealed through such an examination?

3) What theoretical and practical implications might be drawn from the cultural findings?

The first question related to methodology - how organizational culture could be examined in an interorganizational relationship. The approach taken was inductive, generative and constructive. It focused on the lived, inter-cultural experience of a large number of the participants involved, uncovered through extensive fieldwork and a variety of data-gathering techniques. To capture the particular nature of the context, context-dependent information was gathered and mounted into an ethnographic case-study form. To allow for comparability and translatability, data that was context-related, but not context-dependent was collected and assembled in categorical form. By means of constant comparison within and between these two 'modes of knowing' grounded theory to explain culture 'of' and 'in' this complex empirical phenomenon was achieved.

Chapters V, and VI of this dissertation respond to the second question addressed by this study, offering detailed descriptions of the characteristics of organizational culture(s) that have been revealed through this examination.
And, in response to the third question, the theoretical and practical implications that have been drawn from the cultural findings are presented in Chapter VII. In addition, Chapter VII contains a critical analysis of the methodology undertaken for this study, and what might be addressed by future examinations in this area.
CHAPTER IV: The Context of Culture

... a particular approach to the description of TLP

IV.0 INTRODUCTION

The investigations undertaken for this dissertation centered on a systemic partnership between numerous businesses and school boards located in and around Toronto, Canada. Assembled from participant interviews and document review, the following case study describes this interorganizational relationship through three developmental phases. The first phase, titled: Background and Development chronicles the period from 1991 to 1993; from the concept’s development to its realization as The Metropolitan Toronto Learning Partnership (MTLP). Phase two reports on MTLP’s Growth and Initiatives - detailing achievements in membership and financing, and initiatives developed or launched between 1993 and 1996. By 1996, the organization had entered a third phase, characterized by reflection and change. This final section titled: Challenges and Change explores the major learnings garnered during the first three years of operation which motivated significant change in the organization’s external relationships, structure, operation, name and leadership.

IV.1 1991-1993 : BACKGROUND & DEVELOPMENT

IV.1.1 A Businessman Redirects The Focus Of His Volunteer Work

Asked to define the organization whose creation he inspired and championed, Charlie Pielsticker responds: “The Learning Partnership is a partnership where business and education focused on four primary goals to develop the NUMBER ONE school system in North America”. Charlie never does things by halves. He thinks big. He talks big. There is only one standard - the best. Charlie is used to it. Educated at Upper Canada College (UCC), modeled on Eton in Britain, and the University of Western Ontario, the ‘Harvard Business School’ of Canada, Charlie, now over fifty, still occupies a blue chip domain on the 29th floor of the Toronto Dominion Center on Bay Street - the ‘Wall Street’ of Canada. It’s expensive
overhead for a one-man shop. But appearances matter in his business as a financial counselor to the elite. Charlie wears his success well: from the immaculate silk suit, to the designer tie, to the custom made French cuffs sporting gold cufflinks scripted into his initials. From the top of his well coifed head to the dazzling shine on his Dacks, this is 'one classy guy' with a gift for sales both in his business dealings and in his community volunteer work.

Charlie recalls that, in 1991, when another in a series of successful UCC fund raising campaigns in which he had been a driving force was winding down, "I happened to see an article on the 'Number One' school in Toronto in Regent Park...and I thought, 'Gee, why not take the number one at the other end of the scale?'". Compared to the conspicuous affluence of UCC - with its ivy covered bell tower presiding over well equipped buildings surrounded by a manicured acreage dotted with tennis courts and cricket pitches, nestled in a neighborhood of multi-million dollar homes, Regent Park was indeed, "the other end of the scale". Based on an assessment of its inner city schools, the Toronto Board of Education had identified Park Elementary School in Regent Park as 'Number One' - a "dubious distinction" according to John Godfrey, since the designation represented the: "worst housing, lowest family income, highest unemployment, worst educated parents, most crowded living spaces and strongest mix of culturally different people" (Godfrey, 1991:9). According to Park School, of the 94 students who left grade 8 from Park in 1984, 72 had dropped out of high school, 28 of these during grade 9. Of the 22 who finished high school, only 6 held enough credits to enter college or university. Such performance paled in comparison to the norm posted by the rest of the public schools in the province, seventy percent of whose grade 8 students had gone on to graduate from high school. Park was a very troubled school with a Principal who was committed to changing the academic prospects of his students.

The article about Park School appeared in the Toronto Star on a Sunday. By Monday morning Charlie had arranged a meeting with a man he had never met - the Principal, Byron Grant. For Charlie, "he's a Columbo to me...a great guy...and he had never worked with any business people at all". Charlie was impressed: "a third of his school is white, a third Asian, a third Black, and he knows them all by first name". At the end of his visit, Charlie made a request: "put down Regent Park in your words and then your school in your words. Tell me about it because you know about it and I don't. Then tell me about
some things that would make a difference in your school...this is not a money thing. What are the types of things that could help you?". Over the summer, Byron created a document targeted to inform and motivate business people to become involved at the school. Charlie and his wife Sue, a longtime volunteer in Regent Park, helped Byron to set up a not-for-profit organization called: "Friends of The Park" through which non-public funding and volunteer activities could be administered. Although many activities, much new equipment and considerable funding were achieved, the Pielstickers' initiative was eventually frustrated by Toronto Board area administration under pressure from local trustees who did not welcome the presence of the upper crust of business in their territory.

IV.1.2 Charlie Tries Again, On A Bigger Scale

Other articles, such as the Wall Street Journal's description of how venture capitalist Martin Koldyke had mounted a personal campaign to assist the inner city schools of Chicago (Kotlowitz, 1992) rekindled Charlie's enthusiasm for another foray into public education. But it was an article in Fortune Magazine (Ramsey, 1992) that brought to his attention the fact that a large number of senior managers in the Fortune 500 companies were investing a significant and growing amount of their charitable efforts in US secondary, and particularly, elementary public schools. This article gave Charlie both a personal stimulus and a sales pitch for a larger vision - for a Toronto where: "people here will talk about their educational system and with as positive an outlook as they do about the Blue Jays and the Maple Leafs...(and) we made a difference".

Charlie visited a small number of influential business people he knew well. He asked each to guess: "what percentage of (the Fortune 500 companies') senior management were actively involved in educational reform?" They were all surprised by the answer quoted in the article - 84%, and further amazed by the involvement in primary schools which had risen from a reported 27% in 1990 to 65% in 1992. After citing what the article said was happening stateside, he posed the question: "does it make sense for us to do something like this?". By: "something like this", Charlie meant getting a large number of senior business people involved in assisting a large number of Toronto's secondary and particularly
elementary schools. And to manage and coordinate these efforts across the metropolis, Charlie believed a not-for-profit organization, like that established in Regent Park, should be formed.

Based on the enthusiastic response he had received from these direct contacts, he began to build a network of interest beyond his immediate professional circle. Friends such as Eric Barton at KPMG introduced him to senior executives who had a known interest in education such as John Palmer and Art Eggleton. John was Deputy Chair and Managing Partner of KPMG a major, worldwide accounting and management consulting firm. Art had just retired as the longtime Mayor of Toronto and was consulting with KPMG while determining what future direction his career would take. Both John and Art committed their assistance. Charlie located a number of organizations that connected business and education, such as the Higher Education Forum in Montreal, and the Educational Subcommittee of the Conference Board in Ottawa. Their rosters provided further contacts. Charlie reasoned that: “if you are on the Conference Board and the Corporate Higher Education Forum such as Bob Peterson at Imperial Oil...he’s got to be very interested in education...it is a big burning issue”.

Putting his pitch to paper, Charlie wrote to the Presidents of organizations targeted with an interest in education. Many of these letters stimulated responses that led to the recruitment of more executives to his project. Tom Hennebury at Northern Telecom reports that: “when the letters rattled around from Charlie, Northern people write marginal notes and say ‘over to you’...and (it) finally bounced down to me”, because, “I have a reputation in Northern Telecom and BNR (Bell Northern Research) I suppose, being the longest standing person involved in education relations.” Tom then explains, with a smile: “The thing from Charlie came across (my desk), and I made the fatal mistake of phoning him...don’t ever let yourself get attached to the living mouth of Charlie Pielsticker...I couldn’t get off the phone!” He was intrigued with Charlie’s plan and agreed to come to speak to a group of interested executives about his company’s work in public education and particularly, “about our Ottawa experience with the Earl of March high school”. Impressed with the caliber of people Charlie was recruiting and with Charlie’s ability to diplomatically, “allow them to speak their peace and then still weave it all together”, Tom committed his personal and corporate involvement.
IV.1.3 Charlie Surveys The State Of Partnerships In Toronto

Charlie’s conversations and investigations revealed to him that efforts to bring business and education together in Toronto were largely unknown and lacked coordination within and between these sectors. He found examples in business where “things were being done” to assist education, but these efforts were not widely known in the business community, “at the senior, nor operating levels”.

Witnessing the rising eyebrows around the table during Tom’s presentation of his companies’ pioneering partnership activities, Charlie realized that this was not only ‘news’, it was relevant. Here was an impressive Canadian example that underscored Fortune Magazine’s data on the exploding partnership trend in the U.S. - an example offering a solid business rationale for such engagements. Hennebury’s partnerships addressed his companies’ human resource needs - needs that were shared around the table.

Tom’s companies - Bell Northern Research and Northern Telecom were well known for their partnerships with Universities, a number of which had become defacto R & D branch plants for the companies’ pioneering research endeavors. Little known, however, was the fact that since the early 1980’s these companies had reached deeper into the Canadian education system in a number of ways: engaging high school teachers for summer work and learning placements in order to bring a more technologically advanced understanding to the science curricula; developing a “professional engineering program for young high school students who want to work in engineering”; and running: “The National Institute”. In this program, “representatives from schools and Boards, educators, students, trustees and customers” who have teamed in development of a technological innovation are brought to Toronto for training in: “quality exercises and planning and project management and so on”. After this training and, “a heck of a lot of sharing, then they’re funded for two more years”. In addition, co-op and internship programs were established with specific public schools. Tom explained that, lacking a technological infrastructure in Canada most companies in the early eighties, “had to go to Europe and the Far East and the Iron Curtain countries” to recruit qualified personnel. However, he noted, “in the last few years we’ve realized that it is a core competency of our business that we’re able to secure supplies of technically qualified young people on a steady basis”. It was reasoned that to secure an increase in supply of qualified candidates required a
stimulation of demand among Canada's youth to seek careers in science and technology. As a result of these efforts with public schools, Hennebury reported that: “our numbers of students on average who stayed in the math and science stream have gone up, and the numbers of young people who attribute their university studies...to their early experience here are quite significant”.

For Charlie, the education sector proved as unconnected and uninformed about partnership activity across the region as the business sector had proved to be. He couldn’t locate a central place to find out what the various school boards in Toronto were doing about partnerships with business. Having attended private school, he was unfamiliar about the structure of public education in the city. “Phoning around” to “ten Boards of Education” revealed that the number of schools and teachers in the area was huge, and that “each Board did have somebody” who “coordinates between business and education”. He found that while the focus of this coordination included the development of partnerships, most of the efforts were being directed towards establishing ‘co-op’ education placements for students to gain ‘real world’ experience. Charlie’s research also revealed that: “by the time I got to the fifth or sixth (school) board, I realized that they didn’t know each other”.

**IV.1.4 Charlie Connects The Partnership Developers In Education**

During his calls to various boards to find out what they were doing about partnerships with business, Charlie was connected with Mandy Thompson, the North York Board’s Director of Partnerships. Thompson is generally considered to be the first person engaged by a school board in Metro Toronto to focus exclusively on developing ‘partnerships’ with business. She was instrumental in pulling together her fellows from a number of area Boards on January 21, 1992 for a day of dialogue at the Inn on the Park Hotel, hosted by Charlie and his wife. The purpose, according to Charlie was: “for these people from each of the Boards to meet each other and to tell each what they were doing...and now there is a group called ‘T.A.P.’ - Toronto Area Partnership Network, and they meet at least once a month”. He states that, “one of the reasons for looking at connecting those people (is) because people in business don’t know a border...there are things called NAFTA...GATT and everything else where we are negotiating a
Charlie wanted to "try and understand the differences between education in Etobicoke, East York, North York..." and other Boards across Metro Toronto. According to Thompson, Charlie's suggestion to get together was timely. "I was talking to Pat Brandon in East York and we said we really do need to start sharing dialogue...why not get something going just in Metro to share experiences, and at the same time Charlie Pielsticker was talking to me and he wanted us to get together to share information with him. So it just all happened at the same time". Thompson remembers that a few of her colleagues were "skeptical" about "his intentions and his private agenda". For her however, the fact that, "Charlie got involved with us because he wanted to tap us for information...worked out to be just fine" because she felt, "he was really genuine in what he wanted to do and what struck me about his genuineness is his family involvement in Park School. He'd been involved for years in the education system".

Charlie deliberately avoided, as his entry point, the political side of the Boards - the trustees. This was understandable, since it was they who had frustrated his partnership efforts at Park School. Instead he concentrated on the educators themselves, starting with Board personnel who were positively disposed to business because partnership development was their functional responsibility. For Charlie, the political dimension of education, "is not something that business either should be or ever has been effective in getting involved". However, it transpired that it was through the advice of a trustee that Charlie was ultimately able to bring both the professional and political leadership of education across Toronto, quite literally, 'to the table'.

IV.1.5 A Trustee Helps

Metropolitan Toronto is divided into six districts, each with its own public Board of Education including: the Borough of East York, the City of Etobicoke, the City of North York, the City of Scarborough, the City of Toronto, and the City of York. These Boards, together with a Council responsible for education in the French Language fall under the jurisdiction of an overarching administrative entity called the Metropolitan Toronto School Board. The Metro Board is run by a
Director, a small administration and a Board composed of elected trustees nominated to represent each constituent Board. As the ‘Board for all Boards’, its purpose is to manage the equitable distribution of funding between government and the Boards, to coordinate capital budgeting, to negotiate collective agreements with all teaching and non-teaching support staff, and to coordinate co-operative ventures among the Boards. Such co-ventures include: the development of curriculum materials, the application for special federal grants, and the management of a central warehousing and distribution center for materials and supplies. Metro is involved neither in the ownership of any facilities and equipment, nor in the operation of the individual school systems. By the early 1990’s, when Charlie’s systemic partnership efforts were begun, the Metro School Board represented seven Public Boards collectively responsible for 293,916 students in 551 schools, employing 18,823.5 full-time equivalent teachers and 11,000 support staff. The Metro area budget was over 2.2 Billion dollars. (The Metropolitan Toronto School Board, 1996).

Ann Vanstone, Chair of the Metropolitan Toronto Board, and the Pielstickers’ neighbor recalls the day her friends and constituents invited her for coffee and a discussion about, “the concept of a ‘learning partnership’” - a not-for-profit center to coordinate business/education partnerships across all Boards in Toronto. For Ann this was a notion that, “wasn’t in anybody’s mind right then... nobody had thought at all, as I remember, of the sort of larger, much larger vision Charlie had, which was to bring in the entire area”. She noted that Charlie and his growing band of executive supporters, “were very clear that they didn’t want to be involved with politicians...they didn’t want to get tugged by the politics of the thing”. So she: “suggested to Charlie that at that time that probably his best route was to...talk to the Directors of Education who are the top staff people in each school Board...Directors can make things happen...it’s pretty hard in an organization as hierarchical as the school system to have anybody with the ability and freedom to take risks below the Director’s level. The Directors can take risks. The Directors can make decisions provided that they know their Board, their elected Board is supportive”. After some meetings with Directors at which he had been accorded a lukewarm reception, Charlie returned to Ann for more advice. She understood, explaining that: “it’s really a little difficult because people want to hold things in their own Board”. Ann put him in touch with Ned McKeown, the Director of the Metro Board, and the much respected senior statesman among all Directors in the Toronto area. To further Charlie’s
efforts, Ann recruited Donna Cansfield, President of the Ontario Public School Board's Association.

Donna: “had been at the Conference Board of Canada meeting and she had met Charlie and he had talked to her, too. So both Donna and I were in there saying to Ned, ‘this sounds really terrific - you’ve got to make it a go’.

Ann saw the value that the Boards could accrue from a closer, more coordinated relationship with business, and she empathized with Charlie’s previous difficulties in gaining support from Toronto trustees. Though a long time Toronto trustee herself, and its representative to the Metro Board, which later voted her their Chair, Ann’s own ideas about business partnerships in education had met with similar frustration. At a conference she had attended in Halifax in 1986 on Community Education, “I heard about the adopt-a-school movement in the U.S. and how, in fact, some of that activity had taken entire communities and revitalized the economies of them...I came back all excited about it, but in Toronto there was a feeling that an adopt-a-school approach was a right-wing type thing, and that you were turning your students into ‘the cannon fodder of the corporations’...and so I was just irritated and said: ‘well then I’ll go back up to the north end and I’ll organize things where I think they should be organized’”. She explained that, “philosophically and ideologically the Board was dominated by a group of (left wing party) trustees, and, you know, back in the mid to late ‘80s the idea that government could achieve everything and should achieve everything and pay for it and everything else was the one that dominated the Toronto Board. So most of the individual partnerships that the Toronto Board was having were forged almost outside the eye of the trustees because it was the only way”.

**IV. 1.6 Charlie Finds His Champion From Education**

Charlie took Ann’s advice and met with the Metro Board’s Director, Ned McKeown and, according to Ned, “we had a long conversation about what might be made to happen”. Ned saw the potential value of a coordinated approach to education-business relationships in the city. In Ned, Charlie found the appropriate ambassador to direct and manage the education side of the equation. Ned was the non-elected leader of the Board that was mandated to control government revenue distribution, and
coordinate the work of all public Boards in the city. He had risen quickly through the teaching ranks at the Toronto Board to become its Associate Director and Director, posts he held throughout the decade of the seventies, and where he became known as a man who successfully managed both the tough jobs and the very tough political environment. He had proved to be the logical choice to be the Director of Metro, a position in which he had further distinguished himself for over a decade. No stranger to the business sector, Ned had begun his career in the fifties as an advertising and insurance salesman. The skills learned then had proved valuable in his later roles as an educational administrator: in “dealing with money matters”, “negotiating”, in “situations where people had to be fired”, and in “making decisions” in an environment where: “they were accustomed frequently to not having decisions made”. Ned says that when he moved from sales to teaching, “I saw then and still see a very close relationship between selling and teaching. You’re just selling a different product. I mean, you’ve got to be able to ‘deal with your clients’ (as business people say)”. Because of this bi-sectoral experience, in his dealings with business people, “we were able to talk sort of similar language, because I maintain my interest in business, have maintained, for example, my subscription to Fortune magazine which I have been getting for more than thirty years now”.

Ned realized that to move the project forward, three attitudinal resistance points had to be overcome: the real concern by business people and Directors about trustees whose leftist political orientations had traditionally opposed business involvement in education; the negative attitude of those Directors seeking to protect their own business partnership ‘turf’; and a problematic attitude by business people about how to ‘fix’ the education system. Ned advised Charlie that “if you’re going to make things happen, you have to know how to use the political process”. Given the fact that operationally, according to Ned, the elected Board Chairs are: “supposed to be steering the ship while the Director paddles”, he believed that Charlie’s vision needed the support of both the elected trustee Chairs and the professional Directors. Bringing them all ‘on board’ would be a tricky business. Since, in his view Charlie and his colleagues, “had no experience in dealing with politics and politicians”, he reasoned that what the vision really needed was Ned himself - front and center. He offered to invest what he describes as: “a knowledge of how to use the political process, a facilitation process and a willingness to take on a leadership role in
pulling people along”. Support for the initiative by those in education could only be mustered by a man in his position, by one with his personal influence, and by someone too close to retirement to worry about future career implications. In his opinion:

_I don't think that anybody other than the Metro Director could have pulled (the Directors) together. Now, whether a different individual as Metro Director would have done it, could have done it, there is no way of knowing. But you couldn't have visualized (one of the Directors) sitting around the table with their colleagues saying 'you know, we really should all be in this together'; because a number of the Directors would look at that Director and would say, 'why is he saying this, what does he expect to get out of this that will advantage him, if we're all in this together?'. Does Ford compete with GM? Do Public Boards compete with the Separate Board?... Do schools compete with one another?... Sure. It's a fact of life._

Ned took pains to disabuse Charlie and his cadre of high powered business associates from the notion that business could ‘fix’ education. During initial conversations, they had demonstrated to him, “a belief in results oriented approaches, a belief in being able to measure and count things and that if only things were done ‘the right way’ (read ‘the business way’) the Boards would be more efficient and learning would be better”. But it wasn’t so simple in today’s complex educational environment and, for business people who couldn’t grasp that point after a long and careful explanation Ned drove his point home in a more direct style. “I’ve adopted the practice of saying ‘yes, if we’re taking on a couple of financial people from (the bankrupted) Olympia and York to help us with our budget setting’...and that usually (worked) - they sort of give me a sick grin at that”. Ned made them understand that business support could not involve telling education what to do - the educators had to control the agenda. He suggested that the concept should be discussed at a meeting that included Directors from all the Boards and some very senior business people committed to the project. In such a public forum the Directors would be motivated to relinquish vested interests in favor of the appearance of cooperation. After establishing a mutually acceptable proposal, as a united front they could seek endorsement from the trustees.

_**IV.1.7 The Concept Is Presented To Leaders From Both Sides**_

_June 9th, 1992, Ned McKeown hosted a meeting of education Directors and business leaders._

Joan Green, Director of the Toronto Board states that the meeting was presented as an invitation: “to talk
about how we might organize a more focused way in which business leaders and educational leaders could discuss the issues of the day respecting education and could come to some conclusions about how we might work together*. The choice of attendees from education was made by Ned to include all the Directors of every public Board, a representative from French Language education, and the Director of the parallel Metropolitan Separate School Board, which represented Toronto's publicly funded Roman Catholic schools. Charlie brought 12 executives from some of Canada's major corporations including: 3 Board Chairs; 3 Presidents; a Deputy Chairman and Managing Partner; 5 Vice-Presidents. Also attending were the former Mayor of Toronto, the Vice-President for the Canadian Institute for Advanced Research, and the Chair of the Business-Education Committee of the Board of Trade of Metropolitan Toronto.

Charlie felt it was important to include companies with a demonstrated interest in education, and to invite, "people who can command serious mutual attention. It's got to be the Directors...of the Boards as well as having very senior business people who said: 'this is a priority...for all of us'....You have to have the sponsorship of the idea and the commitment that working together does make sense. You've got to have that from the top".

A number of the leaders from both sides had sat together on boards such as the Governing Council for the University of Toronto. However, given the focused agendas of such venues, the opportunity for meaningful dialogue about education issues, particularly those related to elementary and secondary schools, was limited. And, according to Joan Green, current circumstances necessitated some frank talk. She states that there was:

... a very heartfelt and strongly held view that education was under intense and enormous scrutiny, suffering from almost insatiable demands in the face of declining resources and, in the Metropolitan Toronto situation, in an environment of increased diversity. Those were the issues in the minds of the educators....that was what brought me to the table... A recognition that...the world was not what it used to be...and that, in actual fact, we are looking at survival and prospering based on new ways of seeing the world, new ways of relating to others, new networks of communication and support. And that we would probably no longer be able to manage in any kind of splendid isolation, even if we defined it as splendid and others didn't.

Earl Campbell, another Director, saw the invitation as an opportunity to deal directly with: "a lot of negativism coming from the business community" he had witnessed through "the media", "the Conference Board", "the Board of Trade", "Chamber of Commerce publications", "businessmen's
comments at luncheons, and where you interact with them at committees”. Campbell wanted to: “see what their agendas are, invite them to become involved...because in education it is very complex. We can’t do it all alone”.

Charlie maintains a vivid recollection of that first group encounter:

... the Directors didn’t know any of the business people and the business people didn’t know any of the Directors. That’s really where it was. The interesting thing in June of 1992, we, economically, you know where we were. We were right down here. Yet... you call a meeting from 12 o’clock...22 out of 24 people are there by 12:15. FA - bulous! (T)The Directors didn’t really know or believe that the business people would come... we really hadn’t picked up the phone to talk to each other. It is that basic. We hadn’t been communicating. (Our knowledge of each other) grew out of what we read in the newspapers, heard on the radio and saw on television. That’s how the educators have known about business and, ‘the terrible things that they do’. And that’s how business people had known about educators and, ‘the lack of concern that they had’ . So, “we set up, gave a little kick-off and then just started to dialogue. And it was interesting. Talk about cynics! We had one of the Directors saying: ‘well, all that business is interested in, is fodder for the assembly line’. And one of the Presidents of one of the organizations said: ‘look if all we had was the three R’s like I was taught, life would be beautiful again’... “It’s great to get those two poles... verbalized, because once you’ve got that type of thing out on the table, at least you are being honest. At least we can create a dialogue around that. If there are hidden agendas, you go nowhere.

At this meeting Charlie presented his concept in the form of a working draft for a proposed, not-for-profit organization drafted on the basis of discussions involving himself, Ned, Art Eggleton, John Godfrey from the Financial Post, David McCamus of Xerox and Wes Scott of Bell. The reaction of the educators to this concept was, according to Ned “very cautious”. Some Directors of Education met the idea with “enthusiasm”. Others who had been “entrepreneurial” and had developed strong partnerships with business in their own Boards appeared, to Ned, transparent in their: “fear that if the partnership worked it would make things less satisfactory...they had their own things going”. In spite of the presence of “some cynicism”, as reported in the meeting minutes, consensus was achieved to pursue the issue in greater depth. A bi-partisan ‘steering committee’ was struck to develop a “blueprint for action” based on an assessment of Toronto’s needs and resources, and an investigation of models of successful partnerships in other jurisdictions. This ‘steering committee’ included: Charlie and Ned, together with Art Eggleton (former Mayor), George Cobbe and (later) Dan Branda (Chair and President of Hewlett-Packard), John Palmer (Deputy Chairman and Managing Partner of KPMG - Peat Marwick Thorne), Wes Scott (President Bell Ontario), Tom Hennebury (Vice-President, Northern Telecom), and Joan Green, Earl
Campbell, and Tony Barone (Directors respectively, of the Toronto, Scarborough, and Metro Separate School Boards).

**IV.1.8 The Steering Committee Explores The Notion In Depth**

Over the summer of 1992, the steering committee held more than a dozen meetings, each hosted at the workplace of a different committee member. These meetings proved very important, according to Ned, in generating a real mutual understanding:

*We just talked and talked and talked and you know that kind of thing, you get to know people as people and you get to understand then what their problems are, what their concerns are...we have been able to start to use words that have similar meanings to the business people and the Board people....there were two different realities. I mean you talk about two solitudes in Quebec, you have the business people here and the Board people there and they would meet around the copier in two groups and (each group would say) 'they don't understand our problems' kind of thing...I think the ignorance of educators about business was probably at least as great as the ignorance of business about education. I think (in general) there is a perception out there of business being, by definition 'bad'. I think most educators are small 'L' liberal, in fact a lot of people in education have been openly allied with the (political left) and with that then business is by definition 'bad'. And this broke down particularly in the smaller group initially. (Business and education leaders) used to talk by the hour and that was, I think, very helpful.*

The business leaders on the steering committee found more common ground with their counterparts from education than they had anticipated. Like Tom Hennebury, they found that the senior educators: “are all running...multi-billion businesses” that were, “bigger than most of those (business) folks sitting in those big glass towers downtown...And yet, the public at large is totally in the dark and they think of them as being a bunch of teachers, and so does business”. For Dan Branda of Hewlett-Packard those: “at the highest level” in education, “who run the whole systems” demonstrated: “the same, very similar generic concerns as business people”. He also noted that “if you think about who started this thing, it was individuals who had a change agent mentality”. Ann Vanstone observes that: “the business people suddenly saw across the table from them some people who looked very much like CEO’s in the business world...people who knew that change was coming, who embraced change”.

*It was made clear to the business people that while the educators shared their professional management and change orientation, they had “a very different enterprise to manage”. Despite Ned’s early efforts to persuade them otherwise, and “despite all the protestation to the contrary”, the business
people continued to convey, as one Director put it: “a tone of ‘we’ll come in and fix you up...and then you’ll produce the kind of product we need’”. It was a notion that the educators found to be naïve, ignorant and offensive. Joan Green felt strongly that: “this kind of partnership had to unfold with people really coming to an understanding of what we were trying to do...the complexity of what we’re dealing with in public education.” Such an understanding she deemed necessary to overcome the propensity: “to impose, out of some sort of sense of unrelenting righteousness or rectitude, a nostalgic view of what we need to do to prepare people for a world that’s entirely different from past experience, and to prepare a range of people whom we’ve never really dealt with before...a richness of people who represent many cultural backgrounds.” In addition to the complexity accruing from sheer operational size and student diversity, the educators communicated: “how complex our worlds were politically and why CEO’s of education had a very different enterprise to manage than those from the private sector, involving many vested interests and lobby groups who had a direct influence on elected officials.” Green believes that the hours invested by the group in open, and often heated dialogue proved, “very productive and reciprocally enlightening”, resulting in: a “change in tone”, a “movement towards an understanding of how complex our operations were” and a conclusion that “we all had a fundamental obligation to the kids”. And, for Green, the only woman among the CEO’s on the steering committee, the significance of her gender and her role as leader of major organization employing 16,000 employees, “was not lost on the group”. After establishing a common ground for mutual respect and an improved appreciation of each others’ operational challenges, the members of the steering committee reached out to people experienced in partnerships from other jurisdictions across North America. They met with the Director of the systematic partnership that had been started a few years before in Ottawa/Carleton. They sought information from representatives of the Conference Board of Canada in Ottawa, the Corporate-Higher Education Forum in Montreal, and the Commission on Excellence in Education in New Brunswick. They communicated with the staff of the National Alliance of Business in Washington and Chicago, and the Boston Compact in Massachusetts. How did they find these people and organizations? Charlie says: “I picked up the phone...(asked) ‘who knows so and so where’ and you just nose around. If you pick up the phone and you know enough people, you can bludgeon your way through anything”.

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IV.1.9 The Steering Committee Finds A Stateside Model

Concurrent to their deliberations, considerable press attention appeared in the U.S., concerning what was touted as ‘the’ model of what a successful partnership can accomplish - the partnership between the business community and the Jefferson County School Board in Louisville, Kentucky. Charlie recalls that a contact at the National Alliance of Business in Washington had cited Louisville in response to his query: “we are looking for the best examples...we want to see what the best have done. Who would you recommend?” As it happened, the Metro School Board Director and steering committee member Ned McKeown had met the Superintendent of the Jefferson County Board. Arrangements were made for Ned, Charlie, Art Eggleton and Wes Scott to meet in Louisville with members of this partnership for one day in mid-August. For Charlie, the Canadian contingent was a representative group: “you’ve got a politician (Art Eggleton - the former Mayor) who understands the mechanics of things like that and how they work. You have Wes Scott, President of Bell which has a big interest in all kinds of things in education. You have Ned McKeown as Director of the Metro School Board who knows all the politics”.

In Louisville, Charlie and his associates were met at the airport by: “(P)rofessionals of two of the banks, the Mayor and the Superintendent of schools”. He states that, “they told us about Louisville back in 1982” enumerating the many problems the community had faced, including: a school system that had only two computers, a very heavy black population, bussing, de-regulation, armed guards at the school trustee meetings, and a drop out rate they hoped to lower to 30%. After the partnership had been in operation for almost a decade, according to Charlie, Louisville boasted: “750 partnerships between business and education...the highest SAT scores of any metropolitan area in the United States... a 2.5% drop-out rate... and one computer for every six students from Kindergarten through grade 12”. The business community, according to the Chair of the Jefferson County Public Education Foundation, had invested time, expertise, resources and over $40 million in the system. Charlie admits that while it was an easy matter: “to impress Charlie Pielsticker...as to what kids can do and so on, I mean, when was the last time I was in seeing what grade two students did? It was a long time ago”, but he saw that, “if Ned McKeown was really impressed
with what he saw there, then I’m really impressed because his business is education. Mine isn’t”. And Ned, according to Charlie, was as impressed as he was.

Ned reports that: “there is no question that the relationship between the business community and the school system was very close, very strong...They were doing some very significant things down there”. For Ned, it was important that the relationship in Louisville was constructed as a not-for-profit organization involving business and education directly, rather than the more common systematic partnership configuration subsumed under the auspices of, for example, the Chamber of Commerce or the Board of Trade. Ned saw that: “the partnership in Louisville was viewed, because it was separate, as not being either business or education, but being both”. Ned’s position in support of this type of configuration stemmed from a long standing feud he had had with the Toronto Board of Trade (TBT). Ned describes TBT’s relationship with education as: “nastily negative”. On a number of occasions, Ned recalls, the Toronto Board of Trade had published reports about education, giving numbers that conflicted with Board of Education figures. Ned gives the example that, “they would say that ‘more than 50% of the people employed by the Toronto Board of Education are not in the classroom’.”. When Ned met with them to present his evidence that, “the people who are not in the classroom represent...just about 4 1/2 to 5% of the staff”, the result was: “they’ve never made the change (and their numbers) get picked up in papers, in articles”, to the detriment of the school system. In his view: “the Toronto Board of Trade is still one of the major barriers to...improvement in education because of their attitude”.

Although Ned saw that Charlie’s not-for-profit structure had worked in Louisville, he did note the difference in size and scope between the Louisville effort and that planned for Toronto. “There was a single school system...here we’ve got nine school systems in Metro and another eight in the GTA and if you were big employers down there...you’d call Don (the Director) on the phone and say ‘Don, let’s have lunch’. Here, just getting a meeting is very complex, and you’ve got the natural competitive nature (of the Boards)”. While Ned was considering the structural and organizational questions he says that, “the computers were what caught Charlie’s eye”. Charlie states that: “I’ll never forget...seeing what the kids in grade one (produced) that the teacher brought out, and the teachers were so excited to show us. They took time off their holidays to come in for us...showing us the computers and CD ROM’s...”.
IV.1.10 The Leaders Agree In Principle

At a second meeting of the education and business leaders in September of 1992 the steering committee tabled the findings from its investigations, and the Directors of Education were asked to come to agreement on: “what areas the Directors think that business can be of assistance in reaching specific goals” (Steering Committee Meeting Minutes, 1992). By November of 1992 these priority areas had been established and added to the: “Framework for a New Organization” prepared by the steering committee. Attending this third meeting was a much larger number of business executives who had been recruited since the initial meeting in June. The number of education participants had also increased. Most Directors had brought with them the elected Chairs of their Boards of Trustees. The political dimension was ‘in’ because, according to Ann Vanstone: “the Chairs of Boards wanted...to be involved...to get the positive political fall-out from it”.

Under Ned’s guidance, the Directors had reached agreement on four areas for business assistance:

- the promotion of science and technology, with an emphasis on developing a greater and sustained interest by girls and young women;
- efforts to improve student retention;
- efforts to improve student readiness for school and learning;
- increased student literacy.

Charlie noted a change in the tone of the discussions at the meetings in September and November. Somehow the confrontational style he had witnessed in June was being replaced by a more collaborative approach. Nobody talked about ‘cannon fodder for the assembly line’. Nobody yearned for ‘the good old days of the three R’s’. He states that: “I think there is a strong recognition that all of us have changed and I think that for the better of everybody...everybody could see that there really were a lot of good things and the direction and focus was not going to be just mandy pandering around this.”. Charlie attributes the increase in comfort level and growth of collaboration to three factors: that a number of influential Directors and CEO’s had established a level of trust and a strong rapport through a great deal
of open dialogue; that the school Boards had been formally issued the control of the MTLP agenda and its priorities; and the fact that this project was strongly action oriented. As he puts it: "there's lots that's been written on educational reform, the need for this, the need for that...You and I can read forever on the need and what can be done. Well, that's great...who's going to do it?...let's find the best things, the things that are going to made the best difference...Let's find it, let's talk to them and put it into action....and let's get a vision where all ten Boards can work together." Charlie's vision for a systematic partnership between business and the Boards of Education in Toronto was endorsed in principle by the end of the November meeting.

IV.1.11 The Framework For A New Organization

The Framework for a New Organization (FNO), submitted by the steering committee, articulated the purpose, partners, advisors, rationale, vision, priorities, goals, organizational structure, funding, staffing, and physical operation requirements for a not-for-profit, systematic partnership entity to be called: "The Metropolitan Toronto Learning Partnership" (MTLP). This document had expanded and matured considerably since its initial presentation in June of 1992 as conceptual skeleton on which to build a collective body of thought. In the intervening period Art Eggleton had enlarged and revised the copy based on information and agreements emerging out of steering committee work.

According to the draft of FNO presented in November 1992, MTLP would operate as a stand alone entity, independent from the Board of Trade or Chamber of Commerce. There was a provision for advisors to be included from other educational stakeholders, namely: "labor, government and parent/teacher organizations". In the rationale, "education and training" were presented as "a collective enterprise" involving "all sectors of society" and particularly "the business community" which was cited as: "dependent for its success on the quality of education and training". MTLP was presented as the means to overcome the absence of an: "obvious and convenient mechanism to encourage and facilitate that involvement in Metropolitan Toronto", and the lack of any: "coordinated effort between the business community and the ... school Boards in Metro". This organization would assist the education system to
respond to changes in: “national, international and global demands and conditions”. The goal was to
develop an education system that fostered: “learning as a life-long process for every individual”,
becoming: “second to none” in its: “accessibility, flexibility, accountability, adaptability and equity”. As a
result the system would be able to make: “a significant contribution to the competitiveness of Metropolitan
Toronto”. MTLP’s “initial focus” was located “on the primary and secondary school system”, to act as “a
catalyst and a broker for partnership programs”. “Committed to action and to launching specific projects”
this organization would “not directly conduct research”, but would “gather information” and “form
alliances”, “as necessary for research purposes”. However, “an evaluation, review and reporting” would be
conducted annually “to ensure accountability of outcomes”. Participation in MTLP would involve
“members” identified as: “business organizations and school boards operating in Metro”; and “associate
members” defined as: “individuals, foundations and various types of not-for profit organizations” who met
the criteria of: “supporting the aims of the Partnership”. A twenty-five member Board would be
constituted with ten representatives from business elected by the business members at the annual general
meeting (AGM), and one representative from each of the ten participating Boards of Education. In
addition, 5 additional community representatives from the “associate membership” category would be
“selected annually by the Board of Directors”. The Chair of the Board would be established by election at
the first meeting after the AGM, as would the Executive Committee, which would be composed of three
business and three education representatives together with the Chair. The Board would meet quarterly,
and the Executive Committee monthly or, as required by the Chair. Financing would be generated
through membership fees from business and education entities based on a factor to be determined that
accounted for differences in size of operations and consequent availability of funds. The organization
would be initially staffed by: “a full time Executive Director, Program Administrator and
Secretary/Receptionist” working out of an office in “a central location”, “accessible by public transit” with
“parking” and a “boardroom”.

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While the Framework for a New Organization articulated enough about the proposed organization to gain its acceptance in principle, many details remained to be determined before the initiative could be publicly announced and commence operations. How would the organization decide on initiatives and measure performance? What would this venture cost? How could all the Boards obtain the formal endorsement of a majority of their trustees? How could the educational representation on the MTLP Board be arranged so that it would not be dominated by the politically elected Chairs? And, who would start up the operation until a paid staff could be hired?

Early in 1993 John Palmer, steering committee member from KPMG circulated a memo (Palmer, 1993) stressing the need for MTLP work to be evaluated in order to measure progress and establish the effectiveness of the partnership - something he knew the business community would require to justify continued investment. He proposed that, for: “literacy, school readiness and science and technology, we develop and conduct standardized tests that will measure the level of student knowledge at a particular point in time...using statistical sampling techniques”. While acknowledging that that: “erroneous judgments” might arise given the fact that performance of certain schools might differ because of social conditions, and not due to the quality of teaching, he stressed that: “the purpose of our benchmarks is to measure progress and not initial differences”, and: “we will be less interested in what occurs at the district of school level, except to the extent that we need to shift resources to assist areas that appear to be lagging”. He further proposed that MTLP should motivate and assist: “all Metro Boards of Education to agree on a common definition of “drop-out”. On how MTLP would operate, he advocated the creation of a “long list” of specific projects brought to the organization by a “small task force”. Projects to be undertaken would be those that represented, “high impact” initiatives that directly served the issues mandated by the Directors of Education. Prior to circulating his memo, Palmer had it reviewed by Joan Green, fellow steering committee member and Director of the Toronto Board. In the covering letter introducing this memo, Palmer notes that while her: “comments were diplomatic...reading between the lines I think it fair to say that Joan considers my proposals to be well intentioned but naive.”
Green states that while both she and Palmer agreed on the need for evaluation, it took her some time to persuade him that her criticisms of his call for standardized testing did not mean that she was rejecting any assessment. Her criticisms had to do with the prevailing belief among educators that standardized tests only "rank, sift and sort" students and are not helpful in motivating academic improvement, and moreover, that student evaluation was not MTLP's role. While Palmer was: "very well intentioned", in his search for a means to identify where MTLP should most efficiently and effectively direct its resources, she believed that standardized testing was not the appropriate means. Green notes that her discussions with Palmer about this issue brought to her attention: that expectations needed to be made clear, that emotions needed to be removed from accountability issues, and that accountability had to be explained to people.

On his part, Palmer acknowledged later in the covering memo that: “Joan’s well presented arguments” moved him to: “concede that there is a good deal I don’t know about standardized tests and the alternatives”, persuaded him that there are: “some circumstances” where “standardized testing may be unworkable”, and convinced him that: “it is the school system that has the primary responsibility for evaluating the progress of its students”. None-the-less, he still saw a value for “standardized tests” and “other assessment techniques” and strongly and consistently maintained in this paper and at later meetings his: “belief that the MTLP has a responsibility for ensuring that an acceptable mechanism is put in place for measuring progress in each of the four principle areas of activity that we have selected”.

Although the recommendations made in this memo did not win steering committee endorsement at that time, Palmer’s notions, characterized by one education member as: “an extremely gracious hostile take-over bid, based on ignorance” and a business member as: “probably the right thing to do, but probably not doable with the educators”, represented an inspired precursor of what was to come. Three subsequent occurrences prove interesting to note. MTLP has not involved itself in any student assessment. However, Joan Green subsequently agreed to head the Education Quality and Accountability Office - an independent body constituted by government Act and Royal Assent in 1996 to create, administer, and report on province-wide testing of students to standards. While MTLP did not officially involve itself in settling inter-Board definition and measurement differences regarding ‘drop-outs’, many of the Boards
themselves have moved to resolve their differences on this issue. And, within three years, MTLP did adopt the single committee structure for the selection of projects, with a focus on those with “high impact”.

Back in 1993, agreement was reached that while evaluation and reporting of MTLP project performance would remain a requirement, the administration of the organization would determine how this would take place. And, it was determined that four committees would be struck - one for each of the mandates of the organization collectively proposed by the Directors of Education: the Readiness Committee, the Retention Committee, the Science & Technology Committee, and the Literacy Committee. The leadership of each of these committees would involve a representative from business and one from education who would be recruited by the leader of MTLP, and the Chair of its Board. These co-chairs would then recruit their respective committee volunteers, develop project ideas and, following MTLP Board endorsement, make those projects happen.

A preliminary target budget of $400,000 was established by the steering committee, based on projected operational costs and budget levels of other systemic partnerships. The contribution for each member organization was set at $10,000. Ned McKeown crafted a plan whereby the Metro School Board, on approval by its Board would invest $70,000 on behalf of all eight boards (including itself), to ease the process of gaining approval. It could then be perceived as ‘a Metro decision’. He explains that: “some of the Boards, Toronto being one of them, was afraid that if they went back to the Board to get the $10,000 there would be a class war on the floor of the Board and they wouldn’t get the money”. Ned “sold” his plan to them: “saying, ‘look we’re saving ten grand by doing it this way’, and it meant that there was only one debate about paying the money to the partnership and that was on the floor of the Metro Board which is removed to a significant extent from the local battles”. To ensure that the education representation was not exclusively political, it was agreed that for the first two year Board term, of the ten representatives from education, five would be Directors and 5 would be Chairs. For the second two year term, the Directors would step down in favor of their Chairs and vice-versa. Metro Chair Ann Vanstone states: “when we were structuring the first (MTLP) Board of Directors I remember sitting down with Ned saying ‘how are we going to persuade some Chairs not to be there? Well, what I decided was that I would take
the lead and I would say, ‘Okay folks you know I’ve been in this thing from the beginning, but I believe that Ned, Metro Director, should be on the first Board’.

While Ned and Ann were shepherding the commitment through the Metro political process, the search for a leader for MTLP was undertaken by a KPMG recruitment specialist offered at cost. Until that person was officially hired, Bell Canada assigned, gratis, one of its young engineers, Jennette Chau, then between assignments, to assist the steering committee in managing the start up of MTLP. Chau worked with a legal and an accounting firm, engaged at a nominal fee to incorporate MTLP as a not-for-profit, charitable entity equipped with the financial necessities for operation. She set up a computerized contact listing to track recruitment calls and donations. She also developed a newsletter for distribution to business contributors, potential contributors and to the Boards for communication of the concept and its progress. And Charlie took his sales pitch on the corporate road to add $330,000 in business contributions to the $70,000 committed by the Metro Board on behalf of its member Boards.

On May 12, 1993 the Metropolitan Toronto Learning Partnership was officially launched with great fanfare at the offices of the Chairman of Metropolitan Toronto, a level of government that represents all of the cities and boroughs in the Metro area.

**IV.1.13 MTLP Becomes An Operating Reality**

Donated space in major newspapers carried the announcement of the search for a leader for MTLP. From over 400 candidates, Gordon Cressy was named, not ‘Executive Director’ as proposed in the Framework, but: ‘Founding President and Chief Executive Officer’. It was arranged that Cressy would be seconded in a: “three year leave of absence from his current position as Vice President of the University of Toronto” with MTLP paying him a salary, while U of T continued his benefits package. Cressy had a history that reflected the multi-dimensional criteria established by the steering committee. Educated as a social worker, Cressy had served as a Trustee and Chair of the Toronto Board of Education. He had held teaching positions at the Ontario Institute for Studies in Education, the post graduate education center, and had consulted with numerous Boards across Metro on a variety of issues. As President of the United
Way of Greater Toronto, Cressy had been credited with: “renewing the spirit of the United Way as a healing force in the community”, and “championing” the achievement of a record $35 million in donations in 1987. Cressy was widely known, not only in education and business circles, but also among many of the ethno-cultural groups and organizations in the community.

Cressy, a radical socialist in his youth, who had considered Regent Park to be: “my spiritual home”, looked at his situation at the University of Toronto and said to himself: “to be dead honest, the U of T is a little elitist for you. You are more of a populist”. MTLP represented something that was: “closer to your soul and fundamentally it’s much bigger than business/education - it’s really talking about humanizing society in the latter part of this century”. This would give him a platform to do what he loved best. In the style of Will Rogers, to tell stories (some perhaps apocryphal) that in the telling yielded a commitment of the heart. According to the influential past President of Xerox Canada, David McCamus, “he has the unique ability to bridge the gap between groups with different perspectives to help them recognize how much they can accomplish by working together”. According to Charlie, “I’ve known Gordon since United Way days and I’ve been talking to him about this as we were going through the process, you know from the little seedling interest to going along and making sure that we kept him advised of various things”.

A lengthy job description for the MTLP project administrator position was posted at all of the participating Boards. After the steering committee and President of MTLP had interviewed a number of candidates, the position was assumed by Lori Cranson from the Scarborough Board of Education. During her twenty-one year tenure with the Board, Cranson had taught in the business department of a secondary school, where, according to her: “when I taught business finance, I didn’t care if the kids knew the details of some of the theories we talked about, what I wanted them to be able to do is pick up the business section of the Globe and Mail, read it cover to cover, and understand what they were reading. That was the kind of teaching that I did”. After authoring a book on management studies on her personal time, she decided to apply for promotion, quickly moving from Assistant Head to Head, while teaching courses in entrepreneurship. As one of the few educators pioneering this course of instruction, Cranson was often called upon by the government Ministry of Education to assist in developing guidelines and curriculum
materials, and in designing and delivering staff development on methods of instruction for this new subject area. Her expertise led to the authorship of another text, many requests for her presentations at educational conferences across North America, and an idea. Motivated by the difficulty she found in securing co-op placements in which her students could pursue practical entrepreneurial learning, she proposed that her school board establish an entrepreneurial co-op placement center where: “instead of the kids going to work for someone else, which is traditionally how co-op works, they go there and they work for themselves. They create their own businesses and they do it in an incubator kind of environment where they have the support of the teachers, the resources, they get a mentor from the community and we have the computers, the fax machine, the secretary. everything there. They have their own offices with desks and everything and they do their business plan. We bring in a lot of speakers so they get the advantage of hearing all different kinds of entrepreneurs.” After developing the idea, bringing the written proposal to the Board and obtaining $300,000 in federal grants, Cranson’s Center for Entrepreneurship was approved and opened. Because of this unique portfolio of business related experience, the Director of the Scarborough Board and MTLP steering committee member, Earl Campbell, arranged for her Superintendent to bring the MTLP posting to her notice. And after a great deal of thought, Cranson agreed to take on this new challenge.

By October of 1993, the staff of MTLP had moved into premises in the prestigious Eaton Center Complex located in the business heart of Toronto. The space and furniture was provided at no cost by Canada Post Corporation. Equipment was donated by Xerox, and computers by Hewlett Packard.
IV.2 1993-1996: GROWTH & INITIATIVES

IV.2.1 Membership:

Between 1993 and 1996, the number of MTLP's education participants grew substantially. The ten original school boards were joined by eight additional Public and Roman Catholic Boards from the suburbs immediately adjacent to the Metro core area. Three Universities and four Community Colleges signed on.

The number of large business corporations joining the roster increased steadily. According to Charlie: "at the very beginning if you're going to get the attention and commitment of pretty big institutions, which have budgets from three hundred to seven hundred million dollars", you've got to show them that other 'like' organizations are 'in' - big people, big organizations that have lots of people". Since it was clear that big business support was established and growing, Charlie devoted some of his attention to recruiting firms from small business. He noticed that the Canadian Federation of Independent Business (CFIB) had made a presentation to an education commission convened by the Ontario government. Meeting with the Director of CFIB, Charlie was direct. He said he had seen CFIB's submission to the education commission which, based on surveys of its members conducted between 1988 and 1993 spoke to: "a notable drop in member satisfaction with the performance of high schools and universities in preparing young people for their role in the workplace" (Thompson, 1993:3). He then asked how many Directors of Education CFIB had spoken with. He knew from his now extensive education contacts that the answer would be 'none'. He then asked the Director if she knew where the Metro School Board was located. She was unaware that it was a few hundred yards away from her own office. Charlie then relates: "I said 'if 85% of the net new jobs are created with companies of employees of fifty or less, how important is it for you to have this dialogue?...not to sit back, but to say 'okay, how can we develop things together, what types of programs can we be doing together with them and vice versa'...if the major impact on students is up through grade six, when was the last time that we communicated to the Principals of primary schools, let alone the teachers? Do they even know what a small business is like, or is it all the stuff that they read about in newspapers, hear on television?'". As a result of this and other calls, the small
Business sector began to take an interest in MTLP. By 1996 over one hundred businesses and community organizations had been recruited.

IV.2.2 Finances:

For the periods ending December 31: 1993, 1994, 1995, and 1996 respectively, the revenues generated by member contributions, specific sponsorships, conferences, contributions of fixed assets, interest and other income moved from: $457,464 to $625,948 to $874,425 to $3,649,958. Year-over-year growth represented increases of: 36.8%, 39.7% and 317.4%. The significant increase in revenues between 1995 and 1996 reflects the addition of two new and extraordinary sources of reported income: government funding and the market value of ‘gifts-in-kind’.

While there had been a tacit agreement, expressed by business members of the steering committee that MTLP should operate without government financial involvement, notwithstanding this intention, MTLP had applied for, and secured one-time government grants for specific projects, amounting to $30,000 in '94, $58,000 in '95 and $1.78M '96. In addition, a significant amount of ‘non-cash’ resources such as volunteer time and donated advertising space had been received by MTLP. For example, it was determined that the investment of $15,000 in media to initially promote the ‘Take Our Kids To Work’ project (described later) had actually yielded over $200,000 in media value. Such gifts however, could not be recorded in the income figures according to Generally Accepted Accounting Principles owing to the difficulty in establishing a market value. But, in 1996 MTLP embarked on an initiative that involved the receipt of cash and goods in the form of computer hard and software. A market value for the latter could be established, which prompted the audit committee to recognize $594,645 in the category: ‘gifts-in-kind’ in MTLP statements. As a result of the inclusion of government and non-cash resources, revenues for the 1996 year greatly exceeded the $988,055 generated from member fee receipts.

Expenses for the same fiscal periods grew from: $122,395 to $531,160 to $722,670 to $2,782,964. Expenses include: salaries and benefits, office and general, professional development, depreciation, professional fees, post and courier, meeting expense, equipment services, advertising and promotion, brochures, manuals and newsletters, external facilitators and other project costs.
In sum, the organization opened with significant on-hand funding. After three full years of operation MTLP remained in a surplus position in the seven figures. In addition, unrecorded future revenues in the form of pledges of cash and goods for future projects also amounted to over $3 Million.

During 1994, Charlie and Gordon realized that the sales effort was becoming too big to manage alone. Conversations with MTLP Board member Gordon Cheseborough, Chairman & CEO of Scotia McLeod Inc., led to a two year commitment for a number of his brokers to manage the sales effort, using Charlie and Gordon only where their time could be justified. During 1995, a specialist in fundraising was engaged to make a comprehensive assessment and to recommend strategic future directions for resource development. Many of her recommendations were adopted including: refining donation levels and sponsorship offerings, more strategic targeting, and a greater involvement by the MTLP Board in generating funding. In addition, the part-time services of a professional fund-raiser were engaged.

IV.2.3 Initiatives:

From its official inception during 1993 to calendar year-end 1995 MTLP undertook 12 project initiatives. During 1996, in addition to repeating or re-mounting eight of the established initiatives, MTLP undertook three new ventures which dwarfed in scope and resource-commitment all that had gone before.

Descriptions of these initiatives, which follow, reveal a variety of single day events, longer term programs, and one major research initiative. Each initiative involves a cross section of people from both sectors. There is a pre-dominance of big business involvement. The nature of the interactions which have been repeated vary - from information sharing to specific skill development, with an emphasis on the transfer of information from business to education, and on the development of skills related to technology. A majority of the initiatives that have been dropped involve community not-for-profit agencies. Of the 14 initiatives launched, 6 represent Canadian versions of efforts undertaken previously in the U.S. Of the remaining 8 Canadian-developed projects, three were externally developed and recommended to MTLP from individual school boards, alone or in combination with community agencies. And five projects were
internally championed by business people from the MTLP Board and committees together with MTLP staff members.

**Descriptions of Events:**

**IV.2.4 ‘TAKE OUR KIDS TO WORK’**

*launched - 1994*

In this initiative, grade nine students spend a day in the workplace of a parent, friend or relative. Gordon Cressy learned about such an endeavor while on an American holiday prior to joining MTLP. He later found that this initiative, titled “Take Our Daughters To Work”, created by the Ms. Foundation, had been mounted in Canada as: “Take A Student To Work” by the Durham Board of Education in the Toronto GTA. The original MTLP proposal outlined ‘Take Our Kids To Work’ (TOKW) as a means by which educators could satisfy government guidelines which mandated that students at the grade nine level should explore future career possibilities and the educational paths required to achieve these careers. This exploration would assist them in critical course selection in grades 10, 11 and 12. TOKW was presented as a means to: “create a better understanding between parents and children about work”, and “to strengthen” businesses’ “relationships with schools” in order to “dispel the stereotypes on both sides”. Benefits for the business community would include opportunities: “to showcase their work”, “to connect with future labor”, and to recruit candidates for “summer or part time jobs”. Additionally, the experience: “will allow business to communicate directly to students and educators the new skills and knowledge it is now requiring”.

Employing a paid, part-time individual to manage the project, MTLP purchases and generates considerable free advertising for the day, and assists in recruiting business involvement and sponsorship. In addition TLP has created and distributed materials to assist all participants in making the day a positive learning experience. These include: letters, (in any of nine languages), to assist Boards in announcing and explaining the project to parents; and, (in English and French), curriculum materials with suggested lesson plans for teachers, and information guides for business people.

In 1994, 60,000 students participated in the GTA. By 1995, the participation rate had risen to 120,000 students across the province and, in response to external demand, MTLP shared their expertise
and materials with pilot sites in other areas in Canada. By 1996, MTLP had attracted the official participation of many communities in Ontario, Manitoba, New Brunswick and the North West Territories as well as the entire Toronto GTA. Student participation in that year was estimated at 175,000.

**IV.2.5 'THE PARTNERSHIP CONFERENCE'**  
*(launched - 1994)*

Since 1994, MTLP has held an annual spring forum billed in promotional brochures as a vehicle for educators and business people to: “share ideas”, “explore partnership opportunities”, “unearth tips on how to develop, implement and evaluate business, education and community partnerships”, “search for ways to help students make the transition from school to work” and “find new opportunities for employee professional development through community involvement”.

MTLP’s first conference, titled: “Breakthrough and Beyond” attracted over 800 delegates from education and business to hear presentations about education/business partnerships, to engage in workshops on specific partnership issues, and to participate in some of over fifty a number interactive round table sessions on issues related to the subject. Attendees to the 1995 Conference: “Real Partnerships - Real Results” numbered 600. And by 1996, approximately 400 participated at: "Better Together".

**IV.2.6 'WORK-FAMILY-EDUCATION CONNECTIONS'**  
*(launched - 1995)*

By the end of 1994, MTLP’s Readiness Committee, composed primarily of educators and representatives from non-profit and government-sponsored organizations had, under the direction of its Chair from education, engaged in much serious dialogue about the issue of student retention. With the replacement of its retiring Chair with David Williams, President of Loblaws, the dialogue was supplemented by research throughout Toronto on the issue, and a specific initiative materialized. The committee decided to mount a series of seminars in workplaces to share ideas about how businesses can recognize and support their employees’ family needs. While the committee had found that a large number
and variety of family services were available, there was a lack of understanding in the business community about these services. In addition, their research had also unearthed some unique and meaningful corporate employee-support programs that were not widely known. As a result, the committee saw a three-part role for MTLP: as a promoter of the notion that business should take an interest in supporting its employees’ family and education issues; as a connector to facilitate the dissemination of information; and as a motivator for more ideas and action in the business community. Three seminars were conducted in each of 1995 and 1996 involving hundreds of people from education, the social service sector and the business sector, with significant representation from Loblaw’s extensive suppliers and related companies.

**IV.2.7 ‘Principal For A Day’ / ‘Community Leader For A Day’ (Launched - 1996)**

Based on a similar project Charlie Pielsticker had witnessed during a business trip to New York, MTLP staff began in 1996 to work out the details of a reciprocal job shadowing arrangement between Toronto’s education and business leaders. The formal proposal for this initiative specified a half day interaction where leaders from business, not-for-profit firms, and government agencies would: “observe schools firsthand”, “dialogue with Principals, teachers and parents”, by “working along with Principals”. At a later date to be mutually determined, the Principals would: “visit and be part of the community leaders’ workplace”. This initiative would serve the stated goals of: “developing a better understanding of the perceived differences and real commonalities between school and community”; “becoming aware of the diversity of talent in our students who are future citizens, customers and employees”; “creating opportunities for building strong relationships and partnerships”; and, “sharing ideas on the leadership and management of learning organizations”.

A team consisting of MTLP’s coordinator for “Take Our Kids To Work” and a recently retired Principal developed a plan to facilitate connections, produced communications and resource materials, and arranged to host a celebration event for all participants following their experience. By year end 1996
arrangements were far enough advanced to announce a date in May of 1997 for the first run of this initiative, and to establish an initial numerical target of between 400 and 500 participants.

**Descriptions of Programs:**

**IV.2.8 THE ‘ENTREPRENEURIAL ADVENTURE’ PROJECT**  
(launched - 1994)

Acting on the advice of Ian Barratt, a partnership specialist with the Etobicoke school board in Metro Toronto, Lori Cranson contacted officials in Milwaukee, Wisconsin who had created a partnership program targeted to developing entrepreneurial skills among elementary school children. In MTLP’s initiative, a business partner is paired with an elementary school class, from Kindergarten to grade six, to assist them over the period of a year in developing and operating a business or community venture. Teachers and business partners are trained in entrepreneurial education and given curriculum guidelines. Between 1994 and 1996 this project was piloted by Bank of Montreal local branch managers and twenty schools in the Toronto GTA. During 1996 an official assessment of the program was conducted. Numerous changes were recommended to allow for the program to be expanded; to ensure that the program would be self sustaining; and to refine and expand communication and curriculum materials. This program has been scheduled to be re-launched in 1997 once changes have been completed.

**IV.2.9 THE ‘EXPLORING CHANGE’ INSTITUTE**  
(launched - 1994)

Each year since 1994, at the Bank of Montreal’s Institute For Learning, MTLP has brought together school administrators, teachers, parents and business people for a four day exploration of organizational culture and change. Subject professionals from education and business worked with MTLP staff to design a highly interactive curriculum in which participants can learn about the importance of culture in organizations and about models for changing culture through case studies. School board departments and school teams use the information presented to collaboratively design an action plan for
change at their workplace. Each team is assigned a volunteer business partner to assist in executing the change over the ensuing school year.

This initiative was inspired by a visit made by Lori Cranson, MTLP’s Program Director and Courtney Pratt, President of Noranda and co-chair of MTLP’s Retention Committee, to the high-tech, experimental school River Oaks in the Halton Board of Education located in the Greater Toronto Area. They came to the realization that the excitement for learning they had witnessed at the school had more to do with the culture of the school than the fact that it was the showplace for technology. Reasoning that a school’s culture represents a critical factor in student retention and schools needed help to build more collaborative cultures that kids wanted to stay part of, Courtney contacted Jim Rush. Rush had been previously engaged by Courtney to effect change in the organizational culture at Noranda. A former member of the faculty at the University of Western Ontario’s prestigious School of Business, Rush had recently been recruited to create and manage the Bank of Montreal’s $50 million dollar complex dedicated to training of Bank employees from around the world. He and Courtney reasoned that the change program Rush had developed for Noranda could be replicated with educators.

After the first Institute, it became apparent that there were difficulties in establishing the relationship between the program’s content and changes in student retention. However, the program’s contributions in assisting staff members to develop a more collaborative culture were found to be both beneficial and measurable in the short term. This program helped staff to more effectively and harmoniously cope with the exponential demands for educational change in the Toronto GTA that arose in the mid 1990’s. During this period the provincial government changed from left to right, resulting in a concurrent change in Ministry direction and a significant cut in education budgets. Simultaneously, the results of a number of government commissions were announced, calling for more outcomes-based curricula and a structural consolidation of the system through Board amalgamations. Within the system Principals were being encouraged to employ a more collaborative and less authoritative leadership style, and they had recently been mandated to involve local parent councils in school decision-making. These and other influences precipitated a radical shift in the dynamics of school operating environments that mirrored, in the minds of Retention Committee members, the tumultuous changes that had first gripped
many businesses during the 1980's. It was reasoned that business’s experience in dealing with downsizing and re-engineering occasioned by economic downturn, mergers, acquisitions, and technological revolution would prove useful to educators. And based on the results of program research, it was.

School involvement in this program moved from 37 people from 9 schools in 1994, to 80 people from 23 schools in 1995 and 138 people from 31 schools in 1996. The number of business partners grew from 4 to 23 to 31. Both designers and participants determined that the number of participants should not be expanded from the 1996 levels, in order to maintain the participatory nature of the program.

Extensive pre, during, and post program evaluations were conducted with individual education and business participants. Written and videotaped case analyses were made with the assistance of many school teams and their business partners. Some schools made significant and measurable changes in their operating cultures, while other schools showed little effect. However, two major achievements were revealed by the research. The four day program in its location, design and delivery methods was universally heralded as “the best” and “most meaningful” personal professional development educator and business participants had experienced. And participants agreed that bringing a hierarchical cross section of educators from different school boards together with business people dramatically improved “understanding” and “respect” of each sector for the other, smashing previous misconceptions and stereotypes for even the most strongly union-affiliated representatives. By 1996 MTLP began to receive requests by other communities in Canada for information and the opportunity to observe this initiative.

**IV.2.10 THE ‘INVENTOR MENTOR’ PROGRAM**

*(launched - 1994)*

MTLP connects business mentors with student invention teams from grades 6, 7, and 8 to invent a new product or process. This program was based on the: ‘Future Makers Inventor/Mentor Program’ piloted in Oregon where 12,000 students had, by 1994, developed over three thousand inventions. Lori Cranson arranged for a representative from the Oregon initiative to travel to Toronto to introduce the program to a group of local teachers. In MTLP’s initiative, participating teachers were involved in a three day training session, funded by a grant from Industry Canada, a federal government agency. Students
learned about Canada's Patent and Trademark legislation and the protection of intellectual property. With the coaching of the business mentor at sessions both in the school and in the business partner's workplace, the invention teams created their idea, established criteria for evaluating it, and developed a visual display and oral presentation to be given at a year end: 'Invention Convention', hosted by MTLP. At this event business mentors evaluated and offered feedback on the work displayed. The pilot, which was run between 1994 and 1996, involved 12 schools in Metro Toronto, a school in Manitoba and Queen's University. One of the schools worked with Northern Telecom to develop a network that connected all participating schools enabling long distance communication and learning throughout the project term.

In the assessment of this pilot program, teachers voiced concern that the program was "too American"; that topics needed to be explored in greater depth; and that the material needed to be more connected to the Ontario Ministry Curriculum Guidelines. During 1996, MTLP hired a professional firm of educational consultants to re-engineer the program to accommodate teacher recommendations, and to test these changes in a two school pilot. The program is scheduled to be re-launched in 1997.

IV.2.11 THE 'READING PARTNERS' PROGRAM
(launched - 1994)

This program was inspired by Jeanette Chau from Bell, who had assisted the steering committee in the start up of MTLP and subsequently volunteered to sit on the Literacy Committee. Volunteers from business invest two hours each week reading to children in an elementary school. After receiving training from a special team of language arts consultants recruited from Toronto school boards, the volunteers are paired with a class to share their love of reading with the students under the supervision of the classroom teacher. In 1994, 21 current or retired employees from Bell Canada participated as volunteer readers. By 1996 the program had been expanded. Employees from Kodak and Scotiabank, and representatives from the Toronto Intergenerational Group, (representing volunteers from the seniors community), were trained and placed in Toronto area schools.
**IV.2.12 THE 'TEACHER PROFESSIONAL DEVELOPMENT’ PROJECT**
*(launched - 1994)*

Based on the notion that those who have been teaching for many years have had limited exposure to modern business or industrial practices, the City of York Board contacted MTLP to make arrangements for any secondary school teacher to spend a half-day of their professional development leave observing the workplace of a major business or industry. This program was especially designed for educators other than guidance counselors and business teachers. It was piloted with educators from the City of York Board in 1994. By 1996 this program had expanded to include teachers from the Scarborough, North York and Metro Separate Boards. It remains an “on request” service of MTLP.

**IV.2.13 ‘PARENTING FOR EDUCATION’**
*(launched - 1994, subsequently discontinued)*

This seminar and its Parent Guide were developed by US West Education Foundation and is licensed in Canada by the Niagara Peninsula Industry Education Council. The program, according to the MTLP outline provides skills in: “building the understanding, confidence and skills today’s parents need to support their children in school”. Hewlett-Packard agreed to loan staff that had been specially trained to deliver this program for an MTLP pilot project. A Trustee and MTLP committee member from the Etobicoke Board, located near the H-P headquarters, arranged for the pilot to be conducted with 25 of her parent constituents. By 1996 the program was determined to be too expensive to roll out across Metro.

**IV.2.14 THE ‘SUMMER INSTITUTE IN COMMUNITY SERVICE’ PROJECT**
*(launched - 1994, subsequently discontinued)*

MTLP connected with community agencies to assist teenage immigrants in adjusting to their new environment and to practice the English language during the summer. After coaching in resume writing, interview skills and workplace expectations and behaviors, these New Canadians were offered six week placements in community agencies. MTLP was contacted by the North York Board to pilot this program, funded by a grant from the Federal Government. In 1994 twenty adolescents from the North York and
Metro Separate School Boards worked with preschool children, seniors and challenged adults in libraries, offices, and camps, receiving one high school credit in co-operative education for their participation. As a result of the decision by the Federal Government to cut their grants to such initiatives, although a number of Boards picked up the initiative on their own, MTLP canceled this program.

**IV.2.15 THE 'VOLUNTEER GRANDPARENT' PROGRAM**

(launched - 1995, subsequently discontinued)

MTLP was contacted by the Family Services Association of Metropolitan Toronto (FSA) and agreed to a pilot effort among FSA, two local area Boards of Education, the Family Services Association of Metropolitan Toronto, and the Metropolitan Toronto Housing Corporation (MTHC). As described in the MTLP initiative outline, retired and senior volunteers living in MTHC apartments were matched with children from single parent, low income immigrant and refugee families who lack the support of extended families. This connection was reported to give the volunteers who: “have no opportunity to do so”, “the opportunity to share their life experiences, time and love with children”. For the families: “parents are relieved from the burden of being the only adult influence in the child’s life and have the chance to take a break from child care responsibilities”. By 1996 this program was determined to be too expensive in costs and resources to continue.

**IV.2.16 'HANDS ON I.T.'**

(launched - 1996)

Stimulated by what he had seen of the computer generated work created by the students in Louisville, Charlie Pielsticker asked his daughter, then enrolled in educational studies: “what science and technology programs are you taking and what type of software development are you are using?”. He was astounded that she replied: "none. Zero". This prompted Charlie to seek the help of Dan Branda, President of Hewlett Packard to recruit representatives from the teachers’ colleges at local universities and various computer companies, in order to discuss what MTLP could do to stimulate the development of information technology in school systems and teachers’ colleges. After considerable investigation and
discussion these participants in what became MTLP's Science and Technology Committee came to three realizations. First, that education needed to become involved in the worldwide revolution in information technology. They reasoned that this wasn't a matter of dropping computers into the classrooms. Rather, information technology should be presented and used as a tool to change teaching and learning in order to make the act of learning more powerful. Second, that schools in Toronto lacked technological resources to do so. And third, that many teachers, particularly in elementary schools, lacked both the capability and the disposition to use computers and to integrate information technology into their curricula. As a committee member from business put it: "The world is there, but the education system isn't. Many teachers are at the back of the bus on this issue and some of them are phobic about it". Both the representatives from business and those from education endorsed the need to target the entire teaching staff at specific elementary schools as the focus for an experimental pilot involving information technology.

In the resulting initiative, titled: "Hands On I.T." ('I'formation 'T'echnology), MTLP's (by then) seventeen school boards each designated an elementary school where every teacher would be loaned a computer, modem, CD ROM drive, printer, and software for the period of three years. At the end of this period the equipment would revert to the Boards. Each school staff would be trained in three areas: in the use of the equipment; in how to connect with other technologies; and in strategies for integrating information technology into their work with students. Student teachers from the University Faculties of Education assigned to practice teach at the designated schools would also participate in the program. And internal and external evaluations would be undertaken to determine the outcomes; if the outcomes could be traced to the program or other sources; and how such an effort could be effectively and efficiently replicated beyond the seventeen pilot schools.

By the end of 1996, MTLP had hired a retired principal and teacher, together with an administrative assistant and a retired consultant from business to coordinate the project. Seventeen Boards had each selected a school site designated as "opportunity limited", following MTLP's request that this pilot project should not involve schools in affluent neighborhoods. In addition, all staff members of every school had signed an agreement stating that they were committed to learn, to change, and to invest some of their personal time in this endeavor, in addition to the 30 days over three years during which supply
teachers would relieve them to attend their courses. The Boards had committed the funds necessary to generate release time for the participating teachers. They had begun to work with the designated schools to ensure that they were wired and provisioned for internet access. And a team at each Board were prepared to receive the hardware, load the software, and arrange for school delivery.

MTLP, together with the Boards and the schools themselves developed courses to instruct the teachers in how to use the equipment. MTLP arranged with Toronto’s McLuhan Institute to mount a connected intelligence workshop with representatives from each school. MTLP also began to develop a program to provide strategies on how to integrate computer technology ‘seamlessly’ into the curriculum, and had set up a web site to facilitate communication among the participating teachers across the system. Both the University of Toronto and York University Faculties of Education had committed to participate. The Faculty of Education at Queen’s University, located east of Toronto, in Kingston, Ontario was engaged to design and perform the external evaluation. A $2.4 million “Technology Incentive Project Plan” grant had been secured from the Ontario Government, and the MTLP part time fund-raiser had secured commitments for 80% of the projected $4 million in cash and in-kind donations targeted from the business sector. Secured through donations and purchases from a variety of manufacturers, 400 of the projected 724 computer hardware/software equipment packages had been distributed in 1996. Complete distribution was projected to be (and was) achieved by mid 1997.

IV.2.17 ‘KIDS’ MUSE’
(launched - 1996)

By 1996 massive cutbacks in funding to the school boards in the Toronto GTA were generally considered to be negatively impacting arts programs at area schools, and the MTLP Board of Directors felt a need to add ‘the arts’ to their original four mandates. Putting together four occurrences and some motivation from Charlie Pielsticker, Lori Cranson arrived at an idea. She had been informed that the Ontario Government had introduced some new grants to encourage technological development targeted to increase literacy and numeracy. According to a number of recently released educational studies she had
reviewed, involvement in arts activities had led to a measurable increase in the literacy and numeracy levels of the students studied. By accident, she tuned into a radio program on her drive to work which profiled a very bizarre program undertaken by a school class in Atlantic Canada. This elementary class had studied taxidermy, and, with the assistance of the local highway department, (who provided the class with some unfortunate victims they had collected), had, under the direction of a professional taxidermist, developed knowledge on the subject which they had shared with other students. She reflected on the benefits to these children's reading, counting, and collaboration skills; and to their self esteem by reaching outside the classroom and sharing their creativity with other students. Among her many connections with businesses, she recalled a conversation with people from Silicon Graphics who had indicated their need for an “international showcase” for a new computer product they had developed, and some content from education to use on this equipment. And she had recalled Charlie's advice to “think big”.

The result was “Kids' Muse”, a project placing $16 million dollars of donated Silicon hardware into the hands of children in grades 1-3 from 94 participating schools. This equipment included very sophisticated computer hardware, including a web server, that was capable of animation, video and audio communication. Participating schools were selected by their Boards to fulfill MTLP criteria of being wired, having computers already in the school, and having the full support of all of the primary staff. MTLP would arrange for the Silicon equipment to be connected to other computers in the school, and for each of the schools to be networked so that one group of children: “who created a ballet for example, could share that creation with other participants”. A complete curriculum for the project would be developed by Cranson, a group of participating teachers, and a number of arts groups and institutions such as the Art Gallery of Ontario, the Royal Conservatory of Music and the like. A further $2 million from the Ontario Government's technology grants would cover the costs of materials development and other administrative and coordination requirements. By year end 1996: commitments for all of the private and government funding had been secured. Silicon Graphics and the Boards had enthusiastically embraced the project. The school selection and arts community recruitment was in process, and the curriculum development had begun.
Description of Research:

IV.2.18 THE 'LEARNING PARTNERS' PROJECT
(unlaunched to date)

In mid 1993, while MTLP was in the process of start-up, Charlie Pielsticker met with Jim
Levins, chief of Human Resources at Imperial Oil. Jim accepted the challenge of: “trying to figure out
where mentoring fit in this thing”. Jim contacted Fred Reichl, recently retired from Imperial who agreed
to invest his time in exploring the concept. With the later assistance of another recent retiree from Texaco,
Dan Presley, Fred recruited a group of individuals representing the Secondary School Teachers’
Federation, Boards of Education, and a number of social agencies such as the YMCA to form a sub-
committee on “Mentoring” which was later attached to MTLP’s Retention Committee. This sub-
committee embarked on a three year journey to thoroughly investigate the subject in Toronto and
elsewhere, with a view to developing a strategy to recruit and place hundreds of thousands of volunteers
into Toronto schools.

Their investigations involved a search of the literature, numerous meetings with social agencies
and schools, focus group discussions, and a visit to Kansas City Missouri. This stateside connection was
stimulated by a newspaper article reporting the successful recruitment of tens of thousands of community
volunteers for Kansas City Schools. Over a five year period, this city had mounted a major effort to build a
‘mindset for change’, holding numerous town hall meetings with residents aimed at improving their
school system and the ‘feeling for community’ in a very troubled city. These deliberations had resulted in
a renewal process to make Kansas City the ‘child opportunity capital of the world’. Through discussions
with Kansas City officials, MTLP’s mentoring subcommittee gained a number of practical insights about
volunteer recruitment strategies and the infrastructure required to coordinate such an effort.

According to Fred Reichl, all of these research efforts revealed that while: “mentoring is
interesting and can be powerful, it cannot be made to happen in Toronto on the scale of hundreds of
thousands originally proposed”. Social agencies themselves were struggling in their efforts to recruit
volunteers. “While it is generally thought to be cheap and simple, it is neither” since volunteers, “need to
be supported and that costs money". It was found that volunteers sought short term interactions of between six and eight weeks, rather than any long term commitment. Many social agencies voiced concern at any new volunteer recruitment effort that might siphon off their existing or potential volunteer pools. School people expressed concern about the amount of work such an effort would require. While the idea of fostering interactions between adults and kids to support the process of learning at schools was universally embraced as ‘wonderful’, every group advocated the undertaking of a small scale pilot rather than a full scale promotion of mentoring that would be costly and difficult to administer.

It was finally proposed that the most practical solution was for MTLP to use its position as a bridge between education and business to bring together those from business interested in mentoring and schools with specific needs for community volunteers. MTLP could communicate with the newly adopted ‘parent councils’ the Ministry had mandated to be established at each school. These councils would be encouraged to identify their community volunteer needs and create a ‘home page’ identifying their requirements. MTLP would create a master web site where potential volunteers could choose from a menu of options such as a favored geographic location or specific interest, on the basis of which they would be directed to the matching school home pages for details. MTLP could work with businesses to create their own internal volunteer home page connected to the MTLP master web site, and would undertake a publicity campaign targeted to position volunteerism as “the thing to do”. Costs and administrative requirements to coordinate such an effort were explored. By 1996, the project still remained in the ‘proposal’ stage. At this point the education system, laboring under massive change demands and imminent structural consolidation occasioned by a change in provincial government from the left to the right, was deemed to be in “too much turmoil” to undertake such an initiative.
IV.3 1996: CHALLENGES & CHANGE

1996 proved to be a year of change for MTLP. Clearly, as the previous section shows, revenues in that year took an exponential upward surge. In addition, a new focus on a few, high-impact, system-wide initiatives emerged. These surface manifestations of change paralleled a profound realignment of the organization as a whole. In 1996, major adjustments were made in MTLP’s external relationships and its internal structure and operation. There were changes on the Board of Directors. And even the name of the organization was changed. Such significant change does not just happen. In this case, change was, for the most part, the product of three major learnings and one significant change in personnel. In 1996 MTLP’s leadership translated what they had learned about external resistance, about heterogeneous committees, and about performance expectations into new ways of working. And motivating this translation was the Chair of the Board. It wasn’t Charlie.

IV.3.1 Learnings About External Resistance

During its first two full years of operation, MTLP had encountered three main sources of external resistance: from unions, from some partnership directors at Boards, and from some individuals and schools within the education sector. Gordon Cressy realized from the beginning that resistance could be expected from the teachers’ unions. He states that: “One of the strategic things I did actually before taking the job was to make sure the Teachers’ Federation was ‘on side’. And I wouldn’t have taken the job if that had not been the case, because I felt it could have been sabotaged.” He had convinced union officials to take positions on the MTLP Board, and took great pains to ensure that they were informed and involved.

None-the-less, during the first three years, two union locals had picketed the Learning Partnership Conferences, handing out leaflets at the entrance of the hotel which criticized specific MTLP sponsoring companies for, among other things, abdicating their responsibilities to education by engaging in tax avoidance maneuvers. One union group had passed a resolution that endorsed the concept of ‘Take Our Kids To Work’, but not the one mounted by MTLP. And in 1994, the Ontario Federation of Labour
published eight “Guidelines for Business-Education Partnerships”. These guidelines included positions such as:

- “educators should not sit down one on one with business groups”;
- “business access to funding sources should give it no advantage in establishing school curriculum or policy direction”;
- “corporate ‘partners’ should not receive tax deductions, product promotion, free labor, or the right to influence curriculum or educational policy”;
- “school, teacher and student participation in projects arising from ‘partnerships’ must be voluntary”;
- “no individual school should receive goods or funds directly from a corporate donor”, rather, that funds should be donated to “a publicly-administered foundation which would ensure the equitable use of the funds”;
- “exposing students in the classroom to advertising of any type is exploitive”;
- while: “initiatives to help prepare students for work are important...planning for these should include labor as well as business and should be broadly conceived so as to include an understanding of health and safety, workers’ compensation, the role of unions, and the rights of workers”.

From these occurrences, Cressy learned that one could not expect the wholehearted endorsement of any partnership by people who sincerely held the belief, voiced by Jim Turk from the Ontario Federation of Labour that: “no one segment of society should have undue influence or priority” in education matters. “The school system is to be a place where people have the ability to develop critical thinking powers to question and pursue ideas and interests...and in which there’s not an alternative objective other than the intellectual development of that child”. For those who held this ‘hands off’ position there were three ‘alternative objectives’ behind business’s involvement in education. Business wanted: “to develop brand loyalty in young people and young adults”. “Corporations are interested in the schools themselves as a market”. And business has: “a real interest in shaping the priorities in education” towards: “a corporate view of the world”. No amount of argument could move those for whom this critical platform was their raison d’être. After numerous unsuccessful attempts to persuade them otherwise, Cressy concluded that all one could do was to keep the communication lines open, and: “not to be dragged down, but to get on with it”. He took great pride in small successes: in those instances where ‘official’ Federation endorsement was achieved for particular initiatives; and in learning that a union member who attended an initiative had written to the union management expressing the opinion that the interaction
appeared to be supportive and not the work of a 'corporate plot'. But by 1996 MTLP had learned not to anticipate, nor to muster resources to obtain a major turn-around in how unions viewed partnership efforts.

Resistance also appeared from an unanticipated sector - from some partnership specialists at school boards who advanced the criticisms: that MTLP had presented some Board inspired efforts without appropriate recognition; that MTLP had not recognized and directly involved the specialists in their decision making; that specialists often learned about MTLP initiatives after-the-fact; and that they were not consulted about the schools to be assigned for various pilot projects. Ultimately, the "Toronto Area Partnership Network" (TAP) originally established by Mandy Thompson to connect public and separate partnership developers across Metro were motivated to prepare a draft of a "Proposal for the Development and Implementation of Partnership Projects". This memo outlined the "division of roles", the mechanism for "getting schools on board" and various recommendations articulating the working relationship that should exist between TAP members and MTLP. MTLP staff reviewed the draft, offered their input and both sides agreed to commit to these tenets. Subsequently, a more harmonious relationship appeared to develop between the two organizations. By the end of 1996, it was decided to make the annual partnership conference a joint venture between MTLP and TAP, with each sharing equal billing. None-the-less, a few members of TAP continued to distance themselves and their efforts from MTLP.

During the implementation of a number of initiatives, resistant behaviors were demonstrated by some individuals and schools within education, even for those projects which had received enthusiastic commitment from their school boards. In the "Take Our Kids To Work" (TOKW) project, for example, it was reported by a business participant that: "in dealing with this education side, when you needed their activity or you needed information from them, you didn't get it....they didn't always deliver the things - 'a' when you need them, or 'b' never delivered at all...whether that's their nature and their work ethic, I don't know. And maybe that's because, you see, I'm the type of person that, you call me, you send me a message, I reply. I am very customer oriented and customer focused". Resistance was also felt by Education Directors, one of whom was confronted by some principals and teachers who: "thought it was an elitist program. 'Take Your Kids to Work' meant that parents who had jobs where kids could go to
benefit from it would have a first shot at it.... And I had to stand up at all the meetings and say that we have to take a very active role in ensuring that our children in the inner city, and our children from families that are under strain, don’t find themselves disadvantaged, or don’t have to declare a disadvantage...we have to be sensitive to that. It’s not good enough to say ‘we’re launching a day that’s going to make the front page of the Star (newspaper)”. Although MTLP responded by establishing a service to provide ‘host’ work placements for children lacking them, many sites “wanted to shelter them and not let them go....hold them back in the school that day and have a ‘career day’”.

MTLP staff realized that school board endorsement of their initiatives did not ensure classroom commitment to these efforts. As a result, by 1996 MTLP began to require the written commitment of all teachers involved in the two megaprojects: ‘Hands-On-I.T.’ and ‘Kids’ Muse’. In addition, more teachers were directly involved in specific parts of the design, delivery and assessment of many projects.

**IV.3.2 Learnings About Heterogeneous Committees**

In addition to the challenges posed by external resistance, inside MTLP frustration had been experienced in and about the committees. Although chaired by senior management from both sectors, the committee volunteers came from a range of positions in the hierarchies and the community at large. While the investigations and dialogue undertaken by the Readiness, Retention, Science and Technology and Literacy committees had resulted in a great deal of learning about these issues, each committee had struggled in its search for projects to stimulate improvements in these areas. By 1996 only four initiatives had evolved out of committee deliberations: ‘Hands-On-I.T.’, The ‘Exploring Change Institute’. The ‘Reading Partners Program’ and ‘Work-Family-Education Connections’. Each of these initiatives was championed by a business person.

According to one project champion - Jeanette Chau of Bell: “The...Committee is set up of a group of people from all different areas....it seems slow moving, that’s my general impression...We don’t meet that often and I guess that’s where some of the difficulty lies...We only meet once a month and we review things, but I don’t think that anything really gets resolved that often”. Frustrated by this slow
progress, Chau, with a specific project in mind, sought out another business person on the committee,

"And so we got together in sort of a smaller committee and then we just developed it on our own". Then, they recruited specific education people from the committee to bring participants from that sector on board, and the project moved forward. Echoing Chau's frustration about how long it took MTLP committees to arrive at agreement and action, another committee member from business noted fundamental differences between how business and education organizations work, saying:

There's a lot of frustration about the amount of time things can take to happen. I think in many cases in business, you're used to just saying: 'we'll do it' and it's done'. But in the committee, those from education often responded to suggestions with: "'I don't know if it's fair' and, 'in which school?' and, 'what about the equity?'; 'will the trustees agree?'; and 'how do you position this to the teacher?''. And if you're a business person, and you think you're giving something away, you're not used to people saying 'well I don't know if I really want it', 'I don't think it should look like that', and 'we'll have to package it', and 'if you don't give to one we don't want it', and all these things that have to do with the culture inside the educational system, because you can't 'top down'. You have to get consensus and it has to be politically right. All the donations have to have all the diversity issues, a poor school has to get it as well as a rich school, and every Board has to be participating. There has to be a Catholic one, a Public one and all these things become major and the trustees have got to agree, and the Teachers' Federation has to agree, and the Ministry has to agree and all this sort of stuff. In business' perspective: 'all I'm trying to is give you something and all this! If you don't want it, fine, I'll take my money and go!'.

Lori Cranson attributes the limited number of project outcomes accruing from committee deliberations to two sources: leadership and direction. Cranson noted that committees who had arrived at outcomes had a leader who: "has been consistently there...listens to what everyone is saying and is able to pull it together in a way that people see some common ground". These were the characteristics she ascribed to one committee leader from education. She also observed another leadership style that appeared to generate outcomes - that employed by a leader from business who, "instead of bringing issues to the committee for discussion...has small groups discussing it ahead of time and then brings it to the committee almost with a solution". Cranson notes that some educators found fault with the latter style: "because we need to understand, when we have committees that are made up of education, business and community representatives, we need to take the time to understand each other, to understand what's important and how we get to things. Not to just have it laid on in a way that is familiar to the Chair".

Cranson also believes that project outcomes were not readily forthcoming because committees were constituted with little direction. They: "are bringing people from such diverse backgrounds, workplaces, histories, the job is not clear. In fact, the committees have had to define their job". The
committee titles and mandates: Readiness, Retention, Science & Technology, and Literacy were not explained - “So the committees really had to define what their area was”. For example, the members of the Readiness Committee spent a great deal of time coming to grips with ‘readiness for what? - for school? for the transition to high school? for the transition to university or work?’ By way of comparison, Cranson pointed to the faster decision-making and greater output accruing from a special operating committee set up by MTLP to handle public relations. The members of this committee were also from education and business. However, each member, whether at a Board or a business, performed the P.R. function. According to Cranson: “they have met quite often and they know what they’re doing. You see, you’re talking about a group of people that come from similar interests or places in the world of work and so they have a great deal in common...They understand why they’re here, and so all of that background doesn’t have to happen. You can just move forward, and it did, right from day one”.

By 1996, three other important realizations emerged about the MTLP committees. First, that while the measurement of success and achievement towards improvements in the four general areas proved difficult to establish, measuring the success of specific projects was achievable. Those on the Summer Institute Project, for example found that there were too many variables to connect their work on improving school culture directly to an improved retention rate. But they could identify if their project achieved a perceived positive difference for the educators involved. A participant concluded that: “I don’t think that any one organization can make a huge difference in any one of the four areas...but (MTLP) can be very successful in niche areas or projects”. Second, it appeared to some that the work of the committees and the four mandates themselves proved to be “overlapping”. For example, MTLP’s ‘Kids’ Muse’ project could be related to the mandates of the Science and Technology Committee and the Literacy Committee. And third, that: “volunteers can be most effective in working on the committees, but especially the projects...for the volunteers just on our committee, there is a lot of chat and no direct involvement...for those on our project, its been a wonderful experience”.

Dan Branda, President of Hewlett Packard, who participated in MTLP’s original steering committee, served on the MTLP Board and chaired the Science and Technology Committee, noticed, “a lot of differences when it gets to the committees”. At the level of the steering committee and Board:
“you’re finding commonality, change management, things like that and ...you’re having ‘mom and apple pie’ type discussions’. But at the committee-level: “you want actions, and actions usually require work to be done. And that’s where the rubber hits the road or sometimes misses, because now you’re trying to get people who have full agendas in the real world, school systems or in business” to do that work. In his opinion: “most CEO’s select new projects, but they don’t take a project and drive it themselves from top to bottom...other people who are more project oriented have to take it...those skill sets are different....Are CEO’s good committee members? Probably not, because they certainly don’t live in that world”...

When you have executives that’s one thing...but... middle level managers don’t necessarily know where to go, how to go do this. ...You’re really talking about change. Change is not a grass roots, evolutionary thing and that’s where...it gets hung, at the committee level”.

All the learning cited above crystallized in 1996 into a new committee structure. Following the logic articulated by Dan Branda, MTLP separated those who decide on initiatives from those who make them happen. A single ‘Program Committee’ was constituted, comprised of senior representatives from business, education and the community. These individuals would inspire and/ or approve suggested projects. Once a project was approved, specific individuals from this committee would champion the undertaking and recruit, with the assistance of MTLP staff, a group of volunteers from outside the Project Committee whose interests and skills matched the project in question.

**IV.3.3 Learnings About Performance Expectations**

Late in 1995 it became apparent to Gordon Cressy that influential members of his Board of Directors, particularly those from the business community strongly believed that MTLP needed to deliver: “much greater and more substantive results”. Those most intimately involved in MTLP’s operation recognized that a great deal had been accomplished in: “setting things up”, “getting people to dream similar dreams”, “crossing some barriers between business and education”, “getting a very high level of sponsorship”, and mounting a number of initiatives. However, given the fact that three major projects - ‘Hands On I.T.’, ‘Kids Muse’ and ‘Principal For A Day’ were yet to be launched, the only visible
initiative with perceived 'major impact' status MTLP could demonstrate after two years of effort was: 'Take Our Kids To Work'. And according to one executive: “TOKW is not going to change the bloody school system. Take Our Kids To Work is a great visibility project”. To those viewing MTLP from the outside, particularly those who signed the cheques from business, the question looming, and already quietly voiced, was: 'what have you accomplished that makes a systemic impact on education?". There was a growing concern that: "Gord and Charlie achieved progress based on their contacts...the next time you go back...you need to be able to say: 'you gave us this money and look, this is what it achieved'...if this is not possible, people will feel there are better priorities”. For Gordon and his new Chair of the Board (see next section) the question became: 'how pervasive is this burgeoning discontent?'

Midway through 1995, Gordon Cressy was approached by Morrey Ewing, head of a consulting firm that specialized in organizational change management. Ewing had heard about MTLP, was intrigued, and offered to commit his voluntary efforts wherever Gordon might deem them helpful. By late in 1995, Gordon realized where, and engaged Ewing to: “interview a representative cross-section of the Board and other significant friends of the Learning Partnership...to capture the thinking of this group on their hopes for the Partnership...and the lessons to be drawn from its early years”. The results of this independent research would be useful in guiding a strategic planning session that Ewing would also facilitate.

In his individual, face-to-face discussions with MTLP stakeholders, Ewing found that, while perceptions concerning MTLP performance-to-date converged, on future direction there proved to be significant divergence of opinion. Everyone endorsed the partnership concept, the MTLP systemic model, the ‘high powered’ caliber of the creators and the Board, the commitment, skills and professionalism of the staff. People were pleased by what had transpired to date in terms of building an understanding between education and business, and in creating a fully funded organizational reality with some community visibility. However, it was generally recognized that real, hands-on support in the form of direct volunteer involvement had been undertaken by only a very few people. And while a number of initiatives were recognized, only 'Take Our Kids To Work' was perceived to have made an impact that was system-wide and classroom-deep.
Opinions about 'the road ahead' varied. A wide spectrum of concerns emerged on issues such as:

- the challenges MTLP should address because of the political and social environment; how MTLP
- 'success' should be defined and measured; on what and how MTLP should focus; how MTLP should
- approach the generation of resources; how the Board could be more effective; and how to be more
- effective in attracting volunteers.

Ewing reports, about the survey and the Board retreat that followed, that he was:

... surprised by how many people had not only different perspectives, it wasn't so much different
perspectives in that they came from different sectors ... there were the people who had been around since
the beginning, versus those who have been around for a year and may have not made all the meetings,
versus those who had just joined ... Some people were really needing to get back to 'what is this all
about? Let me wrap my head around the whole purpose of this organization' ... and other people were
saying 'back in the old days we did it this way, and we did it this way for a very good reason', and the
underlying message was 'don't mess with it too much' ... Those who had been in at the start had had the
kind of formative experience that was almost magical for some of those people ... Initially, there were
people ... from the business community went in there with some ideas about how they were going to 'fix
things' ... But, they concluded that: 'you tell us what your priorities are that you think we can help with,
and that's what we will do'. And that became a real legacy of attitude that they all referred back to...as...
that's where they 'got it right' ... in that this was not going to be an organization where the business
people told those ... educators what to do ... The business people talked a lot about how they learned from
this ... they'd come in underestimating them ... The educators themselves had this really positive and
strong feeling ... 'we got to set the goals, this wasn't a bunch of people coming in to do finger pointing ...
This was something that was as much ours as it was theirs'.

...(But both the new people and the old guard) were acknowledging that they needed to move to the next
stage ... (The Board session) did end up with a sense of: 'there are some key things we must do' ... 'we
need to move from phase one to phase two. We can no longer consider ourselves a cute start up, we have
to actually start doing stuff. And we need to put the statements of direction and organization design in
place that will get us to that next phase so we'll be delivering more versus promising more.' The
important outcome ... was the permission for a small group to go forward and develop those pieces of
work.

The small group that was subsequently constituted to 'go forward' and translate this input into a
concrete 'future focus' included: Earl Campbell, Director of the Scarborough Board of Education,
Courtney Pratt, President of Noranda Inc., Dan Branda, President of Hewlett-Packard Canada Inc., Harold
Braithwaite, Director of the Peel Board of Education, Morrey Ewing of The Change Alliance consulting
firm, John Fraser, Vice Chairman of KPMG Management Consulting, and Florence Guily-Davis,
President of her own communications company.
**IV.3.4 Learnings Are Translated Into A New Structure**

The document produced by this sub-group of the MTLP Board, titled: 'Future Focus of The Learning Partnership' details: the mission, guiding principles, primary, secondary and explicitly rejected roles, the work, volunteer structure, Board of Directors composition, committee structure and function. It also details: "how our work flows through our structure" and provides project guideline criteria. This document can be seen as a complementary expansion on the: 'Framework for a New Organization' produced three years earlier. While the 'Framework' generally specified why and how the entity would be constituted, the 'Future Focus' articulated very specifically what the entity would do, and how that would happen. Both documents:

- are focused on projects that seek to improve student retention, readiness, science and technology and literacy;

- acknowledge that it is the educators who determine the organization's priorities;

- require that the organization be accountable and outcomes focused;

- reject as a primary role the undertaking of research projects

There are a number of points of difference between the two documents, including: a difference in language and tone from general to specific; explanatory to action-oriented; sentences to bullets. And differences in content from an emphasis on 'why' to an emphasis on 'how'; from a sketchy outline of the organization's role to a specific rendering of how the organization works with explicit detailing of what the organization does and does not do. The differences between the documents reflect not only an expansion on what was originally proposed. A number of proposed changes were cited in the latter document. These included:

- increasing the number of Board representatives to "up to 17" from 10 for both education and business;

- increasing the number of Board representatives from the community to 9 from 5, and reserving one seat each for the Universities, the Community Colleges, and the Teachers' Federations;

- changing the 'Executive Committee' to a 'Management Committee' which would oversee two sub-committees - one dealing with financial matters including fundraising and membership development, and another managing nomination and candidate selection criteria for the Board and Management Committee;

- merging the four existing program committees (readiness, retention, science and technology and literacy) into a single "Program Committee" which would determine projects or initiatives to be undertaken and recommend for Board approval those that are deemed 'major'. This committee would also be responsible
for volunteer recruitment and support. A ‘project team’ would be constituted for the duration of each initiative involving volunteers drawn from the membership. Such project teams would either implement initiatives established by the program committee, or bring to the committee “a business case” for initiatives they created. And;

-mandating on the Board a regular review of overall performance

These adjustments in structure and operation were adopted following a determination that, given the increase in the geographic area covered by the membership, the name of the organization should be changed from: ‘The Metropolitan Toronto Learning Partnership’, to: ‘The Learning Partnership of Greater Toronto’ (TLP).

**IV.3.5 Charlie Relinquishes The Chair**

During 1995, the term of the original MTLP Board was coming to a close, and a decision had to be made about who should be nominated as Chair. What was needed was someone who could lead the organization in the delivery of substantial results by which the support of both business and education could be sustained and increased. Two decisions were reached. First, that in spite of the original notion that the Chair should rotate between business and education, the outcomes nature of the assignment dictated that it should be a businessman. Second, that the man for this job was not Charlie.

A Director of the new Board explained that:

*There was a sense that in order to get outcomes, we need to become more professional. We need to become more systematic and disciplined. And an enormous liking for Gordon but at the same time a sense that Gordon is not Mr. Discipline either. So Gordon plus Charlie was not the combination to get you there. Gordon plus Courtney (Pratt, President of Noranda Inc.) was ...*

... Charlie is the ultimate salesman. And at a time when what you had to do was to convince the people that this thing was for real, convince them to put big dollars in, convince them to put their name...on the Board...all those things that were critical to...just making it happen. Courtney couldn’t have done half of that in the same degree. I don’t mean that he can’t sell, and he certainly has a ton of contacts and networks...Courtney is appreciated and enormously respected for what he does (as the Chair of MTLP’s Retention Committee and the very successful Summer Institute Project) and a whole bunch of other things. But he’s not a: ‘grab you by the collar and say ‘you’ve just got to be part of this, this is the most exciting thing you’ve ever seen!!!’, which Charlie does to perfection.

Courtney Pratt, unlike Charlie, is a ‘boundary spanner’. He had been a teacher and educational administrator early in his career. His background differed from traditional CEO’s. His rise to power had not been through the traditional ranks of marketing, operations or finance. He had moved up from human
resources. And he had felt a need to remove his children from a public system that had not served their needs. His approach, while equally motivating, lacks the “obsession” that had characterized Charlie’s commitment. For those most intimately involved, Charlie had demonstrated, in Ned McKeown’s estimation: “a personality that can be very grating on people...there are those out there who think Charlie’s a ‘pain in the butt’, but they have to recognize that nobody else could have made this happen”.

Charlie encouraged Courtney Pratt to stand for Chair, and continues as an active Director of the TLP Board. Another Board member commented: “So Charlie goes off the Chairmanship, and the first thing he does is say: ‘we’re going to have ‘Principal for a Day’’. And lo and behold it happens”. And what has he earned from all these efforts? Charlie claims that he has not achieved anything but expenses from his work concerning The Learning Partnership. But in the Boards and Boardrooms across Greater Toronto, the name, ‘Charlie Pielsticker’, means something more than it ever has before. And, in honour of his contribution as founder and first Chair, TLP’s Board created the “Charlie Pielsticker Leadership Award” which would, commencing in 1997 recognize: “an individual at the local school level who has made a significant difference in the initiation, development and successful implementation of partnership projects that benefit our students, our schools and our community”. And so Charlie’s name came to officially represent that which had pervaded his lexicon in every memo, at every meeting, in every speech he ever made about what he wanted his business/education partnership to be - “a winner”, “the best” and “Number One!”. 
CHAPTER V: The Characteristics of Culture

... a categorical approach to the description of TLP

In the previous section, TLP was described in the form of a case study that sequentially chronicled the particular personalities, events, and activities that shaped the organization's development and first years of operation. It was a 'cultural relativist' viewpoint, focusing on the whole organization, following the notion that: 'Organizations are culture' (Smircich, 1983b).

In this section the 'cultural rationalist' viewpoint is explored, focusing on aspects of the organization, following Smircich's other notion that: 'Organizations have culture'. In this case cultural characteristics perceived to be exhibited by TLP, Business and Education are described in juxtaposition under fourteen categories of working life. These categories, that are themselves disembodied from particular personalities, events, activities and temporal locations, include:

V.1 'Competition'
V.2 'Decision-Making'
V.3 'External & Internal Relationships'
V.4 'Financial Matters'
V.5 'Performance And Its Measurement'
V.6 'Power & Authority'
V.7 'Professional Development'
V.8 'Promotions & Reward Systems'
V.9 'Risk-Taking'
V.10 'Roles & Responsibilities'
V.11 'Stakeholders'
V.12 'Time'
V.13 'Transformation & Change'
V.14 'Verbal & Non-Verbal Communication'

Under each category, from 'Competition' to 'Verbal & Non-Verbal Communication', four cultural forms are presented:

- The 'FORMAL PRACTICES' exhibited by TLP (T), Business (B), and Education (E) - including the state of affairs dictated by physical environment or operating structure, and practices established primarily by regulation.

- The 'INFORMAL PRACTICES' exhibited by TLP (T), Business (B), and Education (E) - including language and behaviors, together with attendant myths and stories.

- The 'BELIEFS' exhibited by TLP (T), Business (B), and Education (E) - including opinions, attitudes, values and meanings, and any related myths and stories.

- The 'CROSS-CULTURAL JUDGMENTS' exhibited by Educators and Business people - including statements of opinion or criticism about formal practices, informal practices or beliefs.

This section describes and explains the data from TABLE #9, located in the APPENDIX.
V.1 COMPETITION

FORMAL PRACTICE:

Opportunity for Competition

TLP has taken steps to effectively maintain its regional domination, and to maintain control of the partnership programs it develops. TLP was conceived to be 'the' systemic partnership in the Toronto GTA. It is unlikely that the boards involved could afford to extend their time and financial resources to concurrently support more than one entity of its kind. Initially, TLP invited boards to become members as a group under the umbrella of the Metro Board, which paid the annual dues on behalf of all its constituent boards. This made withdrawal by any one board in Metro very difficult. TLP increased its geographical coverage area and name to include the entire Toronto GTA, thus impeding the emergence of a parallel organization in the immediate vicinity of Toronto.

According to the 1996 document: Future Focus of the Learning Partnership, while TLP does: "encourage others to take over leadership of initiatives first sponsored by The Learning Partnership", TLP retains the rights to "formal sponsorship". This allows the organization to maintain financial, and effective control over the replication of its work by any other entity.

The opportunity for competitors to become members of TLP varies by sector. There are no barriers to membership by business competitors. Competitors in a number of industrial sectors have become members, as have businesses operating outside Toronto. However, TLP internal and published documents formally establish barriers to restrict education membership. Membership has been offered only to publicly funded school boards operating in Metro, and, subsequently, the entire Toronto GTA.

With the exception of a diminishing number of government legislated monopolies, the majority of businesses in Canada are not subject to competitive restrictions. Numerous people from big business referenced recent legislative changes, including the lifting of trade restrictions, privatization, and industry deregulation, which have introduced competition into a number of business segments that were previously protected by competitive barriers. For example, a representative from the financial services
sector stated: "clearly all of the pillars have been knocked down. There is a level playing field. There has been all kinds of other organizations that have disintermediated (us). Our original role...is being eroded".

Government accreditation and funding restrictions limit the opportunity for competition in the provision of elementary and secondary education. Although other provincial governments were reported to have recently mandated charter schools and adopted voucher systems, in the Toronto GTA the legislative easing of competitive barriers was noted not to have occurred.

**INFORMAL PRACTICES:**

**Orientation in Language and Behaviors**

TLP’s attempts to establish and maintain a monopolistic position in Toronto and to retain sponsorship control of its programs represent competitive behaviors. However, within TLP, inter-sector and intra-sector collaboration has been encouraged. Representatives from both business and education have been invited to participate in TLP’s development, and throughout its hierarchical structure. Business competitors, particularly from the technology sector, have been approached for funding, and have been invited to participate in TLP events and sit on TLP’s board and committees. To overcome what he called the “natural competitive nature” of the Metro area school boards, Ned McKeown used his position as Metro Director, his influence as a senior statesman in education, and the financial incentive of reduced membership costs for group participation, to promote inter-board collaboration with respect to TLP.

During TLP meetings, when business people used competitive language and made proposals that would involve competitive programs in education, TLP staff were observed to politely: “discourage the use of competitive terms and practices, in favor of those that were ‘cooperative’”. To discourage businesses from viewing TLP as an entry point from which to market products and services to the education sector, in the Future Focus document (1996), among ‘Roles Explicitly Rejected’, it was stated that: “we are not a broker of competing interests within the school system”. Consequently, TLP has dissociated itself from supporting competitive behaviors in the education sector.
It was self and cross perceived that business people frequently “talked about” competition and used “competitive terms” and “competitive sports analogies” in their language. They recommended and employed competitive tactics. Educators also noted that business people: “feel comfortable with competition” and that, for business: “that’s the way of life”. Business officials observed, however, that they suspended their competitive behavior, “in public”, when they were: “working for a common cause”. For example, no overt competitive behaviors have been evident among business representatives at TLP meetings. For the ‘Hands-On-I.T.’ program, for example, many high tech competitors agreed, without reservation, to pool resources and work together.

Educators were self and cross perceived neither to reference, nor to use competitive terms, but to employ: “collaborative language and behaviors”. A school department head remarked that: “business people use language that education people are not comfortable with...The analogy to sports and that kind of stuff - the competitiveness which I think education has really moved away from”. However, it was self perceived that boards exhibit competitive behaviors among themselves - in their competition for resources from government and business; in their competition for personnel; in their ‘off the record’ statements that position one board to the detriment of another. This competitive behavior was observed to be suspended when board people were brought together, “in public”.

**BELIEFS:**

**Definition of ‘Competitors’**

During strategic planning sessions and fundraising meetings, it was apparent that the leadership of TLP considered their ‘competitors’ to include all not-for-profit organizations which seek charitable funding, regardless of the nature or focus of their work.

Business people advanced a broad conception of competition, expressing the belief that their competitors constituted “anyone” who produced a similar or substitute product or service.

As one president admitted: “we got scared like hell because we know that if someone produces something at a cheaper price than we can, people are going to buy that”.

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Educators referenced a narrower definition of competitors than did business people, citing only those institutions that are similarly mandated and funded by government. As one director put it: 

"do public boards compete with separate boards? Sure, it's a fact of life".

Rationale for Orientation to Competition

In the 1992 TLP charter document: Framework for a New Organization, the "rationale" and the "vision" speak to the principle of synergy - the belief that through the efforts of business and education in collaboration, economic competitiveness in the larger, community sense could be strengthened.

Numerous business people voiced or implied the belief that the principles of economics and consumer behavior necessitated competitive behavior not only in business, but in other sectors, such as education.

Educators generally expressed the view that competition fosters "aggressiveness" and "conflict", and "winners and losers" and "discrimination" which can contribute to psychological and sociological dysfunction in a classroom or in society.

CROSS-CULTURAL JUDGMENTS:

By Business People About Education

Focused on a broad view of what constitutes competition, numerous business people observed that, "alternative ways of learning" via television and the internet represented competitive threats to public education, which educators did not appear to recognize. Educators' propensity in their language, informal practices and opinions to ignore or discourage competition was criticized as a "blindness" to the fundamental principles of economics and consumer behavior. It was said that: "educators think: 'we're the only game in town, so we may have a little bit less money to do it, but we're still going to be the only game in town' - there's a whole culture that goes with that." Business people judged that increased competition in education: "is going to be there", and "if school systems, for whatever reason are incapable of change...what will occur is a new system will come in and replace you".

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By Educators About Business

A director echoed a body of education opinion that the opportunity for competition that exists in business would be detrimental if it were to be adopted in the public education arena. The director argued that competitive alternatives to public education: "end up creating the school for the elite", leaving public schools to serve: "a very disadvantaged part of the population and probably woefully underfunded". This, he felt would result in: "a polarized society".

V.2 DECISION-MAKING

FORMAL PRACTICE:

Decision Authority

Individual, hierarchically shared, and shared decision-making have been practiced at TLP. Lower level staff at TLP were not observed to be involved in operational decisions which, for the most part, have been made by management individuals. However, TLP management does share decision-making with representatives from its business and education membership. Policy and program decisions advanced by TLP management require board and committee involvement and approval. During 1996, the four operating committees - literacy, retention, readiness, and science and technology, which made decisions regarding the initiatives to be pursued, were collapsed into a single program committee. In the four original committees, whose membership had been hierarchically heterogeneous, decision-making had proved to be slow-moving, consensus oriented, and to a large part focused on subjective interpretation of the committee's role. By 1996, it became evident that locating the decisions about what projects to undertake among these four committees was not resulting in the rapid development of a host of project initiatives that was perceived to be needed, particularly by participants from business. In response, a single program committee was constituted, whose representatives held senior management responsibilities in education and business. As a result, while decision-making to arrive at project initiatives continued to be shared, it became hierarchically restricted. However, decision-making regarding project implementation has continued to be not only horizontally shared between the sectors, but also vertically shared with all of
those involved, regardless of their positions in the hierarchy. Over time, for example, more and more teachers have been involved in project implementation decisions.

Business decision-making authority is self and cross perceived to reside with management individuals. By formal practice: “people are empowered to make decisions, not necessarily by committee and group consensus”. Educators often made the remark about their business colleagues that: “they can make decisions, themselves”.

In education, by formal practice, policy decisions are made by government and are noted by directors to be “mandated on” school boards, which decide how these policies are to be implemented. In boards, decision-making is shared by directors with their trustees. A few directors were reported to: “take tough decisions” upon themselves, informally, although most “leave the tough decisions to the politicians”. And throughout the hierarchy, educators were self and cross perceived to make decisions by: “committee and group consensus”. The Education Act, however, does empower the position of principal with the individual authority to make school-based decisions.

**INFORMAL PRACTICES:**

Decision-Making Rate

At TLP, decision-making by the board and by the newly mandated program committee, whose members have been drawn from senior management, has proved to be relatively fast. A similarly rapid rate of decision-making could be observed in TLP’s Public Relations and Finance Committees. These committees have been populated by individuals who shared a similar vocational background. During these meetings, matters have been tabled, information has been provided, and the decision to be made has been specified. Comments, discussion and requests for clarifications have been minimal. It appears to be tacitly understood that a member will only comment if an affirmation seems to be needed to rally support. And clarification will be sought only with a pointed, and not rambling, question. On those very few occasions when comments, or the demands for clarification were not limited in number, the chair
of the decision-making body would withdraw the matter, instructing TLP management or the appropriate individuals to re-table the matter at a later meeting, after further examination.

Unlike the usually rapid rate at which policy and project decisions have been made, decision-making regarding project implementation matters, which have involved non-management business people, and particularly, teachers, has maintained a slower pace. Numerous committee members have taken the opportunity to comment or question, and these communications have sometimes involved explanations and personal experiences. Consequently, discussion on matters has often been lengthy, and the number of actual decisions rendered at a single meeting have been few.

It is self and cross perceived that: "the decision-making process is faster and more straightforward" in business than it is in education. Educators observed that business people:

"make the decision quickly", and they often prompted or interrupted with phrases such as: "what's the bottom line?" and "let's cut to the chase".

Decision-making in education was self perceived to be: "slow off the mark...it takes time...to O.K. an initiative". At meetings: "everybody's got to have their say". A great deal of time was noted to be invested by education management in advance of tabling any initiative to trustees in order to predict:

"how the trustees would probably react" and "where the rubbing points would be".

**Decision-Making Goal**

TLP’s decision-making focuses on delivering two outcomes - achieving consensus among those involved, and deciding on some action that would serve to advance a particular project.

Business people were observed to seek an action result from decision-making, targeted to address objective, and often financially related goals. Educators spoke about business’s tendency for: "less talk and more action", and the propensity for: "business decisions (to be) based on the bottom line".

Decision-making in education can be observed to involve consensus-building towards predominantly subjective, value goals. Business people observed that educators' language and behaviors are: "more collaborative". Educators explained that: "the best decision" involves generating "support" to realize, "value for money" because: "our aim is not to make a profit". That which constitutes:
“value for money” was noted to be subject to a number of different interpretations. However, a trustee pointed out that: “some decisions made by school boards are business decisions” - such as a decision to purchase computers, which was made on the basis of cost-benefit analysis, a common business practice. She observed that this decision, (involving an action and an objective result) was reached more quickly than most board decisions.

**Decision Compliance**

Once projects have received approval from TLP’s project committee and board, TLP staff could be seen to accept and implement decisions, and their efforts could be seen in the short term. However, compliance in the education system for TLP initiatives, in spite of strong support by boards, has taken considerable time to realize, and on a number of projects teacher resistance has been encountered. This has prompted TLP staff to begin to seek the written commitment of participating teachers and greater teacher involvement in project implementation decisions.

It was self and cross perceived that business people appear to accept and immediately implement “top-down” decisions, and that compliance or non-compliance could be soon witnessed. Business people stated that when they are asked to implement a decision or change, they “get going” and “deliver to specifications”, and that their efforts were “noticed”.

In education, decision adoption behaviors were reported to take a long time to realize or see, given the bureaucratic structure and the nature of the work. It was stated that while government decisions were “acknowledged”, in cases where board or school personnel disagreed with these mandates, they would often: “say they’d do it” with the “full intention” of “ignoring it” or “dragging their feet”. And an educator reflected a body of expressed and hinted opinion when he said: “in many cases...given little supervision and regular changes in government...who would notice?".
BELIEFS:

Resistance to Decision Authority

TLP staff resistance to the decision authority of their hierarchical superiors has not been observed, even though, on some decisions, staff confided their disagreement. It appeared therefore, that resistance was believed to bring about negative consequences or penalty. On the other hand, for volunteer or participant resistors to TLP decision authority, such as educators who publicly disagreed with TLP positions and activities, no penalty was expected for doing so.

In business, those who resist the decision-making authority of their superiors were believed to suffer negative consequences - "odds are you’re not going to be working there".

While educators cited numerous instances where boards, principals and teachers have challenged or resisted the decisions, or decision-authority of their hierarchical superiors, there was little expectation that such behavior would result in termination, unless the offense proved, for example, to be criminal. However, a director pointed out that directors who have challenged the decision authority of their trustee boards: “have been fired for doing so”.

Rationale for Decision-Making Orientation

On policy and project decisions, TLP has directed decision-making toward the top levels of each participant sector hierarchy, clearly believing that the need to deliver outcomes necessitates fast decision-making on project development. However, it is TLP’s practice when implementing projects to include in the decision-making as many of those involved from education as possible. And project implementation decision-making is expected to be slower. This implies a belief that the need to accommodate people’s needs necessitates collaborative and careful deliberation.

Numerous business people concurred with a line manager who explained that: “in a competitive marketplace you’ve got to know how to make decisions quickly...get going...deliver something”. The need to deliver outcomes in a competitive environment was believed to necessitate business’s propensity for fast, action-oriented decision-making practices.
According to educators, the need to accommodate people's needs precipitated their slow, consensus-oriented decision-making practices. A director explained that: "we're afraid that if we don't get all the data...we'll make a bad decision that's going to affect people's lives", and that is why, "every decision you make has to be made very carefully".

**CROSS-CULTURAL JUDGMENTS:**

*By Business People About Education*

The comparative judgment was expressed by a business person that in his sector: "collaboration is a means to an end, not an end in itself", while in education it is: "an end unto itself".

Business people criticized education for what they saw as a lack of decision-making authority and action, and educators for the amount of time they took to make decisions. As one of many business people remarked: "there is a lot of frustration...about the amount of time things can take to happen (in education)".

**V.3 EXTERNAL & INTERNAL RELATIONSHIPS**

*FORMAL PRACTICES:*

**Organizational Connection to the External Environment**

TLP deals directly with individual business members. And although there is direct contact with boards and schools, usually school contact is initiated through boards. For example, the seventeen boards in Toronto’s GTA were each formally asked to nominate one school for the ‘Hands-on-I.T.’ project. Once the schools were identified and briefed by the boards, TLP assumed the contact, directly.

There is no structure positioned between businesses and their publics for relationship management purposes. The contact therefore, between businesses and their external environment can be direct.

By formal practice, a government structure is positioned between the education organization and its external environment. Trustees are elected to represent the education interests of everyone in the community. Trustees sit on a school board that acts as a mechanism to manage relations between the
education organization and the general public. Information and needs of the community channel through the trustees to the school board, and directors are formally obliged to channel their decision-making through their trustees. Education's contact with the external environment is therefore, indirect. Recently, however, the Ontario government has mandated that every school must create a ‘parent/community council’, which has been billed as a mechanism by which schools can connect and respond more directly to parents and others in their communities.

**Barriers to Collaboration**

**T** Within TLP there are no apparent barriers to collaboration among staff members. Staff are not physically isolated from each other and regular staff meetings are held. TLP is equipped for internal and external electronic collaboration. Virtually every staff member has been provided with a telephone, computer, and training in the use of hardware and specialty software. TLP is wired for internet connection and has developed a home page. Volunteer collaboration, especially among those from education has been limited by their availability.

**B** No formal barrier to collaboration in business was cited. Business people often spoke about “getting together” as if it posed no physical problem. Numerous business people spoke about the proliferation of technology in business, and how this had promoted and enabled a greater degree of “connectedness” and collaboration. An educator on exchange in a business pointed to her computer terminal and rattled off a litany of information and relationships that were: “at her fingertips”. In fact, technology has come to act as an informal conduit through which many external and internal relationships in business are managed.

**E** Engagement in collaboration, especially at schools was self and cross perceived to be difficult because of traditional and physical operating conditions, federation restrictions, and limited access to technology. Educators acknowledged that: “teachers are very isolated in their classrooms” and, “teaching has been a very independent notion”. A number of business people recognized that internal collaboration was difficult in education, given the fact that, “most teachers are acting very much on their own for many, many hours of the day”. A school department head came to the conclusion that: “buildings
have a lot to do with education” when she observed the question posed by teachers when they first saw their classrooms in a newly built alternative school. Each class had been designed with a window between the class and the corridor. Every teacher wanted to know, “where the blinds were?” Clearly, teachers have become accustomed to working alone which is how their classroom environment has been traditionally structured. In addition, by the formal practice of union agreement, teachers may not be expected to engage in any collaborative work with colleagues outside their classroom duties. And throughout schools teachers’ access to technology, even telephones, is extremely limited. At school boards, however, collaboration may be expected. Senior management are not members of the federation. People are not isolated by classroom responsibilities. And there is greater access to technology.

**INFORMAL PRACTICES:**

**Extent of Employee Experience Outside Organization/Field**

- **T** TLP staff have been recruited from a variety of professional experiences and, for all of them, TLP is a new field.

- **B** Business people referenced exposure to, or experience outside their organizations and outside their fields. While part of this was attributed to arise from changes in jobs and careers, it was also attributed to external company collaboration, where: “we’ve had to knock heads with different people from different industries”.

- **E** Educators spoke about the limited amount of experience most teachers and “supervisory officers” have had outside their field, and the practice for many teachers to: “spend their entire career in one school”. A recent motion at one GTA board, whereby teachers would, “change schools every seven years” was overturned due to federation resistance. And a department head remarked that most teachers, even socially, are not removed from the education environment: “Teachers associate with each other (primarily because) we’re off at the same time”. However, it was observed that a significant number of new teachers: “have spent time in the working world”. One educator explained that: “it’s harder to get into Teachers’
College now”, and that new recruits are, “somewhat older, they’ve more experiences, they’ve usually done different things”.

**Extent of Intra-Sector Collaboration**

TLP has established contact with the managements of other systemic partnerships across North America. TLP staff have donated their expertise and materials to partnership entities in other cities, provinces and territories in Canada, so that ‘Take Our Kids To Work’ could operate nationally. Most recently, TLP staff have been asked to assist people in Vancouver to set up their own systemic partnership.

Although businesses, even in the same sector, were self perceived to: “all do things differently”, business people reported a recent increase in the number of inter-business collaborations. In business: “people are collaborating and sharing and changing methods and have had to adapt and do things different ways”. Inter-business collaboration was even noted to occur among competitors in the comment: “we sit down with our competitors and work together on things”. Clearly, no business would willingly collaborate with respect to a matter that might jeopardize a competitive advantage. The collaboration referred to by business people involved, for example, a number of businesses mounting a joint campaign to reduce corporate taxes, or the types of interorganizational engagements that were referenced in my previous chapter on ‘Interorganizational Relations’.

Boards of education were both self and cross perceived to practice “no uniformity”, and to each “have their own way” on such matters as: “the way they deal with the public”, “approaches to decision-making” and “relationship with their senior officials”. Specific instances were cited where attempts to stimulate collaboration among boards on issues of mutual concern were frustrated by “a lack of cooperation”. Business people also noticed that: “each school board tends to work...as a separate entity” and that, “networking is very poor amongst peers in the education system”. However, educators did point out that recent attempts were being made by Toronto area school boards to collaborate on the establishment of a common definition and measurement technique for ‘drop-outs’.
**BELIEFS:**

**Rationale for Internal Orientation to Collaboration**

Collaboration is TLP's raison d'être. However, the staff do not appear to engage in collaboration among themselves or with volunteers unless some purpose is deemed to be served. For example, while project committee meetings are regularly scheduled in advance, if, as the meeting date approaches, there is little for discussion, the participants are notified and the meeting is rescheduled to a point in time when a full agenda can be addressed.

When speaking about internal collaboration, business people clearly attached no 'stigma' to the practice. One executive opined that collaboration was necessary: "so that when business people need help they can "pull other people in...to help them right there and then". To admit to needing help was not negatively perceived because, "in the business community they exploit the best ideas, and capitalize on them and use them". An executive from a technology giant explained that: "there is no shame in getting help and working with others. If we in our field, like the information technology field, can't do it all alone, how can a poor teacher think that they can have all the knowledge, and they can pass on the most current knowledge and the best things to their students and stay current?". Business people represented collaboration as a tool to be used "when required". A collaborative disposition was opined not to represent the way business people or human beings are, except when they are required to be. A banker explained that: "It's amazing... scarce resources... what it does for collaboration and that's just human behavior. I mean, I can show you places in (my business) where people said, 'I don't need to work with you. I'll do my own thing cause I've got all this money'. All of a sudden the money is cut, the budgets are cut, and so it's: 'Oh my God, now I've got to work with you!'...that's happened since the dark ages. We still behave exactly as we behaved for thousands of years...We're very predictable."

Although teachers encourage collaboration among students, few demonstrated consistent collaboration practices among themselves. Collaboration by school staff was deemed to be problematic in schools, not just because of formal practices that make 'getting together' difficult. For example, a board official stated that there is an older generation of teachers for whom collaboration
represents unsuitable behavior. When he first started to teach his attempts to collaborate with colleagues were discouraged because: "to admit that you were having any problems" was interpreted to mean that: "you’re incompetent".

**Perceived Organizational Relationship to the External Environment**

TLP staff can point to their extensive connections and particular understandings about business and education as evidence that their organization is connected to the external environment. And TLP’s endeavors to bring business and education together speak to the assumption that neither sector should operate in isolation.

Business people also voiced the belief that their sector is connected with its external environment, advancing opinions like: "business has discovered... that we can’t operate in isolation".

Educators themselves portrayed their sector as isolated from its external environment. A superintendent called education, "a world unto itself" and many educators referenced the external environment with the words: "the outside world". It was noted, however, that education’s traditional ‘isolationist’ behavior is changing; “the doors are open now more than they were”. Attempts by school boards to develop partnerships with business, and the recent mandate for schools to establish ‘parent/community councils’ were cited as examples of new level of “connectedness”. In addition, a superintendent stated that more boards are engaging professional development companies to work with their staff - companies which have primarily dealt with private sector companies. A trustee noted that business people have been asked to sit on board committees. Among board people: “there is a lot more talk about partnerships...with students...parents...and the broader-based community”.

**Perception of Business-Education Partnerships**

TLP clearly represents the belief that business-education partnerships provide benefits to both sectors. However, TLP makes it clear that the benefits to business should not include the exploitation of partnership for marketing and sales purposes. TLP is scrupulous to avoid being used as a marketing channel by any company. Corporate supporter names are reported, but no ad lines or product
features are allowed in communication materials. Any company that has approached TLP to assist in product distribution, even free samples, has been turned away. TLP has accepted for membership any business who sought it to date, including, for example, producers of alcoholic beverages. However, the organization has been more discriminating in the selection of companies to be approached to sponsor specific projects. No alcoholic beverage producer has been approached to be the visible underwriter of a project.

Business people stated that an external alliance with education offered a number of benefits - for education, society, business organizations and business people. From a corporate perspective, it was stated that the public education system required business assistance, because educators: “couldn’t cope alone”, and, “for our future as businesses, we can’t cope if they fail”. A banker explained that business people: “want a workforce of the future that is reasonable. There’s a real cost of constantly training and re-training. There’s also a general cost to the society in terms of taxes that get paid to support people that can’t get jobs or are on welfare because they can’t read and write….we’re not even talking about intellectual capability, we’re talking about people who cannot function, and therefore are not employable…and then there’s a broader issue…we can’t be competitive globally if we don’t have a competitive workforce. It’s just that basic”.

For many companies, businesses partnerships with education were perceived to enhance their ‘positioning’. A banking executive stated: “in every community across the country, banks are...an integral part...a focal point...we’re very involved...we have a role to play and people expect us to play a role”. And it was noted that: “if educators know something about learning, and learning is of critical strategic advantage to organizations, maybe they can help us”.

Involvement in partnerships was also cited to offer personal benefits to the business people involved. A board partnership director was told by a CEO from a major Canadian company that partnership efforts gained him internal credibility : “my employees see me honoring the role of this company, honoring their role as a parent in the education of their kids, and I feel it’s important to have our company involved in this for that reason”. For a particular financial institution involved at TLP, middle managers were encouraged to demonstrate community work as: “part of their evaluation”. An educator
opined that a number of business people appeared to involve themselves with education partnerships because: "they have always wanted to teach. It’s imparting what you know to other people. We know people feel good about that". And a senior vice president echoed that notion in his statement that: “I can, in the vernacular, ‘get my rocks off’ teaching....I really enjoy getting in front of a class. That’s my stage.”.

Both business people and educators noted that many business people who are involved in partnerships: “want what’s right for their own children because these people are parents, too, or aunts and uncles or whatever, but I mean they care about the fact that people are getting good education.” And it was clear that partnerships offered an opportunity for some people to do something with peers they liked. A vice president stated that: “The people here (at TLP) were my friends - a guy from (Bank X), a guy from (Resource Company Y)...”.

According to one line manager, on a personal level, there are many altruistic reasons why business people involved themselves with educators. But, on a corporate level, she opined:

... (for the business sector that has discovered education (high tech businesses))...nobody should confuse that agenda. Company X, if it’s doing work with the education world (it) is because it wants to get its (products) into it...or through the kids to the parents...I have no trouble with that motivation. I think it’s a legitimate motivation...On the business end of it...is: ‘what do I pump in here, for what do I get afterwards?’. So it’s a mixture of business opportunity couched under social reform and social ‘do-goodism’.

With respect to developing external relationships with business through ‘partnerships’ every educator interviewed clearly believed that education and educators needed such relationships, for a variety of reasons. Educators referenced an inability to cope with their professional responsibilities, expressed as: “we need business’s help...we can’t do it ourselves”. Benefits from this external connection were said to be gained by: education, educators, and business. Education could accrue additional resources to deal with the fact that: “we haven’t got any money and so we need somebody to help pay”. Other, ‘non-financial’ resources were cited, such as practical curriculum enrichment which would help to overcome criticisms that: “our students aren’t educated in what the real world is like...and they’re not motivated to continue through school.” Several school board people saw partnerships as a means to determine business needs and as a platform to defend education against poor performance allegations. Educators wanted to learn: “what business really wanted” or, “why they are really criticizing us”, and many were anxious to:
“tell them directly what’s going on, and prove that the media is wrong...it’s not our fault...society has made our job impossible”. A senior board official suggested that: “There are myths that get in the way of business and government being able to do well in partnerships or get a lot out of the partnerships. One of the reasons for the partnerships is to get rid of the myths.”.

Partnerships were said to offer benefits for individual educators. A board partnership specialist observed that some educators engaged in partnerships because they have a “business orientation”. She said: “I think you tend to find the more entrepreneurial teachers, maybe the more right winged, creative teachers willing to get involved in partnerships”. It became clear that a number of educators involved at TLP were either close to retirement and looking for career opportunities, or could be perceived to be ‘scanning’ the business market to identify where their skills might fit. In fact, a few educators explored or were offered employment opportunities by business people they had come to know at TLP.

Numerous educators stated that through partnerships business people could learn from educators, for example: “our ability to deal with and understand multi-cultural environments that they are, and will be facing in their workforces”. And particularly, “our knowledge about teaching and learning”. According to a trustee, and former business executive, business has recently recognized a need to be involved in lower levels of education:

“I think that business has probably realized now that it’s what takes place in the high school years and even in the elementary years that really shapes the way their graduates are going to perform, and previously, I think they were under the impression that it was what happened at university”. According to many educators, the most successful partnerships, “are not one way transactions”; “there’s got to be a real exchange”; “an investment of not just money, but people and ideas - both ways”.

CROSS CULTURAL JUDGMENTS:

By Business People About Education

While business people acknowledged that the traditional “isolationism” of education is changing, judgments persisted that: “education holds itself apart”; “the changes of the world have not impacted in”;
it remains: “a very ivory tower protected world”; and it represents: “the last industry and the only industry in today’s world that... is as ghetto-ized and balkanized as it could be. Business people stated that they:
“get this sense...of insularity” from educators, and this notion that, “nothing can touch us’.

A line manager from a financial institution judged educator’s motivation to engage in partnerships with two words: “scarce resources”.

Another line manager judged that:

... educators think about business people: ’you have to be very careful of them. We got to count all our fingers after we shake hands with them. They can afford everything, so why should we have to pay for anything? ...It’s good for them to be affiliated with us...they’re accountants or they’re engineers, what do they know about teaching?’... What (educators) forget is that every one of those business people, men and women, was in their classrooms at one time and carry a lot of baggage. And ...the majority of them are parents and go to PTA meetings or parent/teacher interviews. They carry baggage. They get really irritated when the report card changes because the kids are into different schools and neither of the report cards look the same and they can’t understand it.

By Business People About Business

A president empathized with teachers who criticized business behavior towards education:

For too long business has just sat back and taken pot shots at teachers and the education system. They’ve told them they’re lazy. They’ve told them they’re not doing a good job...without demonstrating any understanding of the complexities and challenges that educators face....I know that a lot of the people sitting at these towers here couldn’t do that job for five minutes without having a nervous breakdown ... So teachers feel: ‘they (business people) don’t understand what I go through every day’, which is true ... and ‘where do they (business people) get the bloody arrogance to tell me how I ought to be able to do a better job if they don’t understand what I’m doing?’... I don’t blame them for having that attitude, because I don’t think we have done a very good job of trying to identify the areas where we really can add value.

By Educators About Business

A senior superintendent judged that inviting business into education will invite influence and cause change:

If we invite the business world into the educational system, we must do so recognizing that it will cause changes and influence...business will want to influence two things, perhaps three. One would be the outcomes. The business world would want to see their students graduating with skills that are specific for supporting their business world. They’d be silly not to. Two, they will want to influence, therefore, the curriculum itself; what is taught and how it is taught. Three...perhaps...I think that they might want to influence its operation, to an extent that they would see it becoming cost-efficient.
The judgment was put forward by a union official that the establishment of direct relationships between education and special interest groups - particularly business was 'wrong'. In his words:

The school system is to be a place where people have the ability to develop critical thinking powers to question and pursue ideas and interests, and in which no one segment of society should have undue influence or priority, and in which there's not an alternative objective other than the intellectual development of that child...We've traditionally had, at the elementary and secondary level, a sense that these have to be places who are only answerable to the general public which is why we have a democratic structure of electing school boards...and that if there is any special interest group in the community that wants to have some influence, presumably school boards as democratic vehicles representing the community, set up structures to provide some insulation and guide lines, and the province does the same...nobody should have preferred access to school...and one of our concerns with 'partnership' is that a certain view of things is going to permeate the education system and under the guise of a public system that represents everybody, we're getting increasingly a corporate view of the world.

By Educators About Education

A principal contended that some 'traditional' principals are "threatened" by collaboration with business or any other part of the community. He explained that: "traditionally, principals have 'known best'....principals have 'told' the community and the teachers what was going to happen at the school", and "they don't have the skills to do it", since "negotiation and mediation skills are seldom found in the principship, they haven't been taught".

A board official suggested that people whose teaching experience has involved a single school makes them: "very parochial in their view...that "the way our school does it is the way it should be done"".

School board officials, however, perceived that, accustomed to visiting and working in a number of different school environments, they were not parochial.

All of the many educators who referenced the existence, in education, of negative perceptions about partnerships with business strongly dissociated themselves from such a position. It was judged that underpinning the anti-partnership position was a basic fear of losing control. Such ascriptions included: "It's a natural fear of the left wing towards the business environment"; "It's a real fear of privatization in the school system and business wanting to define our standards etc."; "It's the management perspective they object to, and what they want is the worker perspective through partnerships"; "There's a genuine fear that businesses will try to move their product through the children, and while that may be true for some businesses, that has never, and will never happen at TLP - it's an unwritten rule". It was opined that
federations: “will not sit down and analyze what a good partnership is and a bad partnership is. They’re: ‘all bad’...They fought co-op and co-op won. They’re fighting partnerships, and partnerships will win. The economy will dictate. They won’t have any choice”. Another person from a board stated: “I get very angry with people who think that because we’re talking to people from business, that they’re going to take over the curriculum and influence it. I mean, give us some credit for God’s sake! It makes me very angry when they do that. I mean, what are we? Weak minded? That we’re just going to roll over and say: ‘let the business people take over’?"

V.4 FINANCIAL MATTERS

FORMAL PRACTICES:

Revenue Generation Responsibility

T LP is responsible for generating its own revenues, and, in the absence of revenues, the organization would be forced to “go out of business”.

B By formal practice, business organizations assume the responsibility for generating revenues. Bankruptcy legislation dictates that businesses which demonstrate consistently poor financial performance must cease to operate as ‘going-concerns’. As a small business president explained: “you have to meet a payroll...(and)...if we don’t move one piece of merchandise, I’m still responsible for that...if we don’t generate that revenue...very quickly things become quite quiet”. Educators recognized that business people: “can’t sit around at meetings, they have to make money”, and that business is: “very much profit and loss, very much geared to the ledger, very much geared to productivity, and you know you’ve got to be this side of the line or you’re dust”.

E Business people noted that, being “taxation based”, education is the recipient of “a pre-determined amount from government”, and education budgets are “contingent upon other factors...outside (their) control”. By formal practice, revenue generation responsibility in education is traditionally assumed by government authority, and the Ontario government provides grants to support boards which do not have a financially self-sustaining tax base. It was revealed that boards in the GTA which have
encountered financial difficulty have been “taken over” by government officials. However, those boards have not been forced to close, and their debts were discharged by government.

Financial Period Focus

TLP maintains a short term financial focus - reviewing financial progress monthly, and at each of the eight yearly meetings of the board’s management committee.

Financial reporting requirements necessitate a very short term focus on financial performance in business. “For the private sector”, one executive noted: “you’re looking at your profits quarterly or monthly...and if it starts to decrease...you have to immediately react”.

In education, it has been common practice to maintain a longer term focus on financial matters, traditionally following an annual budget cycle.

Organizational Performance Criteria

TLP measures its success in both financial and non-financial terms. The number of initiatives mounted, the extent of education and business participation, and the perceived value of these initiatives - in other words ‘outputs’ are considered to be as critical to success as are the financial ‘inputs’ that support them.

Reporting requirements dictate that business organizations measure their performance in financial terms.

On the issue of performance measurement, one superintendent explained: “there is a different bottom line for education ...success is determined by a number of (non-financial things) like student performance...no strikes...getting policies approved by trustees”. Beyond accounting for funds received, the focus is on value, not money.
INFORMAL PRACTICES:

Degree of Financial Orientation in Language and Behaviors

TLP has adopted the informal practice of enlisting the voluntary assistance of a group of external financial specialists from a business partner to develop prospects and solicit revenues for the organization. Notwithstanding this assistance, TLP management and staff clearly maintain a high financial orientation in their language and behaviors. In discussions about project initiatives, the question most frequently posed has been: “have we got the money for this?” When large donations have been received, the information has been immediately telegraphed throughout the office, and telephoned to key board members.

It was generally perceived that business people demonstrate a high financial orientation. Business people observed their own propensity to reference “the bottom line”, and to speak about the size of organizations in monetary terms. Educators noted that business people use financial words, speak of their success in financial terms, and base their decisions on “the bottom line”, and “making a profit”.

Except among senior officers, educators appeared to demonstrate a low financial orientation. Business people referenced educators’ general lack of involvement in, and understanding of financial terms and practices. And some educators at TLP meetings were observed to express opinions of discomfort about, and immunity from, financial matters. One business person reflected on her numerous partnership experiences with board officials and principals. She made the comparison that while business people routinely demanded ‘quid pro quo’ in transactions, educators did not. While that ‘quid pro quo’ “could be ‘in kind’...it’s never the notion of ‘for free’”. Yet, she witnessed that: “although school boards might talk about wanting to be entrepreneurial and set up entrepreneurial functions within themselves and they would talk about ‘partnership’, their first and foremost instinct is: ‘what am I getting for free?’”.

Further, she found that: “they are not equipped with the infrastructural understanding how to do business...an understanding of business-like budgeting...the language, things like profit margins, productivity ratios, rates of return.... I had to assign my business manager to be at the table to help bridge the language between the principals and the business types”. She did find that financial specialists at
boards did understand this language and these concepts, but by and large their background was in accounting and not teaching. As another executive pointed out: “teachers” are not concerned with financial matters: “they have the concerns of the classroom and student behavior”.

Recent changes in economic conditions have reduced the level of funding available for public education in Ontario. Concurrent to the timing of this downturn in educational revenues, exceptions to formal and informal norms can be observed and were reflected by education management, who stated: “we’re going to have to find the money somewhere else”, or “we haven’t got any money and we need somebody to help pay”. Boards in the Toronto GTA have informally assumed a greater degree of responsibility for revenue generation, adopting informal practices such as: soliciting funds from non-government sources through ‘partnerships’, selling educational services and charging user-fees. To allow for the strategic management of these resources, educators have adopted the informal practice of separating these funds from public monies by establishing arms length administration. It was self perceived and observed that board personnel have recently demonstrated an increase in financial orientation in their language, and a shorter-term focus on financial matters.

**Resource Management Strategy**

TLP’s money and other resources are strategically managed. For example, the revenues and computer goods solicited for the ‘Hands-On-I.T.’ endeavor have been allocated to that specific project. And ‘Hands-On-It’ resources have been distributed only to participating schools. Although ‘Take-Our-Kids-To-Work’ is a system-wide initiative, participating boards, schools and teachers are self-selecting. Those who choose not to be involved, aren’t, and receive no resources from TLP.

Business people explained that: “we don’t just account for money, we manage money as a strategic placement”. This norm was underscored by statements like: “if you can justify the expenditure in order to pursue an objective...in an objective sense, then you get the resource”.

Business people observed that educators: “account” for “large sums” and, “manage money more as a cash flow versus a strategic placement”. It was noted that educators: “don’t plan beyond the grant period”. To serve the interests of fairness, educators state that resources in education must be distributed
across-the-board. Business people noted that at TLP meetings, when resources were to be distributed, educators indicated it had to be done: “with every single student in every single school...and it’s not fair to start here or offer it to one”.

**BELIEFS:**

**Definition of 'Financial Accountability'**

At TLP, two meanings are attributed to the notion of ‘accountability’. Staff recognize that they are accountable for generating revenues or they will lose their jobs. Only Lori Cranson, the now vice-president of programs is still officially ‘on loan’ from her school board and, in the event of financial failure at TLP, would return to her employer. And staff also perceive that they are accountable for the judicious spending of member donations. It has been, in fact, a joke among board members that as a result of Gordon Cressy’s frugal approach to personal expenses, he chooses such: “cheap restaurants for lunch meetings” that, “we’re better off to choose the spot and tell Gordon that we’ll pay”.

A very significant difference in beliefs between education and business surfaced about the meaning each sector ascribed to the terms: ‘financial accountability’ or ‘financial responsibility’. An education director expressed concern that: “business people really didn’t see school board administrators as being responsible in handling fiscal matters”. This perception perplexed him because, in his view: “we can’t allow for deficits in our planning. We have to keep within our budget”. Clearly, being financially ‘accountable’ and ‘responsible’ meant something different to this director than it did to a senior business person who said: “I have revenue targets...I clearly know what I’m expected to do. I’m measured on it and if I don’t achieve it I’m accountable and perhaps out of a job”. For a ‘revenue administrator’ and a ‘revenue producer’ different criteria determine accountability. Yet, these differences in meaning did not appear to be recognized. TLP’s business people consistently challenged educators’ financial “accountability”, publicly and privately. And TLP educators remained perplexed and either hurt or angered by business accusations that they were not ‘accountable’, when, based on their interpretation of the term, they were.
CROSS-CULTURAL JUDGMENTS:

Business People About Education

Numerous business people rendered the opinion that the level of, "resources to pursue organizational goals" is "greater" in business than it is in education.

To business people, educators' across-the-board resource management strategy proved to be time consuming, frustrating and growth-limiting. One executive reported that: "I get to visit...around North America and see little snippets of really exciting things and I get all excited...and you go back (to) the school system...and (they say): 'unless you can do it with every single student in every single school, it's going to cost billions of dollars and it's not fair to start here or offer it to one'...all these roadblocks come up and in the mean time we are not taking advantage of what is possible!".

Educators, particularly teachers, were viewed as having a low orientation and fundamental distaste for financial matters which represented, to a number of business people, an avoidance of what they deemed to be "reality". One executive noted that "teachers" don't teach "for free, it's an economic transaction", and: "that's a reality that makes a lot of them sort of uncomfortable". Another perceived that teachers thought making money was "dirty" and "beneath them".

The strength of business people's belief in the pervasiveness of economic principles could be noted in judgments such as: "educators think there is no such thing as 'I could go out of business'" and: "they think that education's important for children therefore it must go on...(but) when there's no money left, there won't be any". Although business people did recognize that some of their colleagues from school boards demonstrated a higher financial orientation, these individuals were cited as: "exceptional".

Educators About Business

Educators made two judgments related to business about financial matters. A number expressed the opinion that "we can't afford the resources and technology that business has". And, according to a number of senior board executives: "business people really didn't see school board administrators as being responsible in handling financial matters".
V.5 PERFORMANCE & ITS MEASUREMENT

FORMAL PRACTICES:

Organizational Performance Assessment Period

TLP has maintained a short term focus on financial performance, and assessment of non-financial performance has been made in the longer term. A review of revenues and expenditures occurs monthly. The document: *Future Focus of the Learning Partnership* (1996), states that: “the board of directors annually reviews broad measures of overall performance by The Learning Partnership, and reports to the members of the Partnership on its progress”. The organization’s internal assessment of its ‘progress’ has been chronicled in its annual reports. In addition, during its second full year of operation Morrey Ewing was engaged to provide an independent, external assessment of TLP performance based on a poll of those involved and interested in the partnership.

In business, organizational performance assessment was stated to be frequent. Reporting requirements dictate quarterly measurement of financial performance. A president noted that measurement is done “consistently” in his organization.

In education, organizational performance is not measured in the short term. Boards are required to provide indicators to the Ministry confirming that government policies have been implemented. Due to the size and complexity of the system however, these indicators are not expected in terms of a few months. A year or more was cited as the reporting norm.

Employee Performance Assessment Period

For TLP staff, performance reviews have been conducted on an ad hoc basis. Recently, however, the objective has been established to conduct annual performance reviews.

It has been common practice for most companies to perform annual employee performance reviews. However, a line manager, with revenue responsibilities observed that: “I’m constantly being measured”.


It was reported that teachers' performance is evaluated: "every three years". For board employees, in contrast, performance evaluation was noted to be annual.

Organizational Performance Expectations

Organizational performance expectations: TLP's mission, guiding principles, roles, work etc. have been clearly codified in: Future Focus of the Learning Partnership (1996). These expectations have been formally accepted by the board of directors, and parts of the document can be observed to be quoted by TLP staff members. However, these relate only to how the organization functions. On what the organization is expected to accomplish clarity and acceptance has not been achieved. By 1996, the perception by the business partners that limited outcomes had been achieved motivated the engagement of a facilitator to poll members and run a board retreat. Clarity and agreement on what the organization should accomplish did not result.

Business people reported that their organizational and employee performance expectations were clear to them. A line manager commented: "I think I clearly know what I'm expected to do". And, even an educator remarked that: "when you work for a (business) organization, you know what the mandate of the organization is".

The performance expectations of education appear to be unclear. Since governments change, and ideologies change, expectations have changed. A director commented: "it is very hard to measure our successes because we can never get a common agreement in the community"...about "what is it that you are going to measure us on". A long time trustee explained that: "the public school system has to respond to what the public wants"...and "the parents of the students now are very different...from, say 1965". At that time parents "didn't want their children to be overburdened, they wanted them to be happy. They didn't want them to meet lack of success in school ... And they were dealing with a different philosophy of education that said 'we're the educators, we know what we're doing, we're going to do things differently and you stay out of it". However, she noted that in the 1990's, parents' expectations and involvement in education have changed. "Now there is an attitude that says 'we can't close our eyes to this any longer'...if boards of education don't set performance goals, you can abandon your students to teacher
biases”. Among educators, outcomes are continually debated. As one educator put it: “if you put a group of educators in a room, you’ll have different opinions about what education is, what is an educated person, what are the basics”. Business people recognize this debate. One line manager stated: “there is a very, very fundamental split about education for what? Are we educating for life and for you? Or are we educating so that you fit into the business world?”

**INFORMAL PRACTICES:**

**Employee Performance Criteria**

Since no position at TLP is unionized, staff performance measurement is not required to follow collective agreement terms. Until recently, employee performance has been assessed, according to Gordon Cressy, “after the fact”, based on subjective criteria. Presently, however, a more systematic approach is being developed, whereby employees will: “sit down with their supervisor and establish mutually accepted objectives for the year, against which the employees’ performance will be assessed.

Since it is rare for professionals in business to be unionized, their performance criteria is not guided by the terms of collective agreements. Employee performance measurement is self and cross perceived to involve evaluation against measurable objectives. An educator observed that in business: “certain behaviors are expected and certain standards of work are expected”. A number of executives noted that the measurement of employee performance is being expanded beyond the achievement of financial objectives. According to a senior line manager: “the private sector has learned to evaluate beyond just the dollar sign”, to include: “other measures,” such as “market evaluation”, “customer satisfaction”, “employee satisfaction”. According to a banking executive, this followed the notion that: “the financial side, in our view is a lagging indicator”...it is a: “function of what you did yesterday ... the leading indicators are some of the softer issues, such as customer satisfaction and community involvement and employee satisfaction”. For an employee in business: “You’re very clearly evaluated against objectives, even if (the employee) does not have control of the profit and loss of the (organization)”. In cases where jobs do not have a direct bottom-line connection, “there are specific behaviors that we’re
expecting of that individual, and they are measured accordingly. One staff manager explained that, in the past, his profession: “public relations - you could never really measure it”, because the job involved “soft objectives” such as the task to “raise awareness” of the organization. However he noted that now, “even in our profession...you can have objectives, you can have hard objectives and you can have measurable objectives”. He said: “you’ve got to figure out what the desired outcome is...what the process is ...the steps to get you to the desired outcome, and therefore measure your progress toward each of those antecedents”.

One vice president attributed the increasing scope of performance measurement criteria in business to: “this intellectual revolution” where, “we're really dealing with the value that the human mind and the caring person can provide. We’ve never been able to measure that before, although we’ve been able to feel it. Now we’re learning how to measure it and display how important that is”.

Teacher performance evaluation follows union agreements which dictate the criteria to be employed. A teacher can be evaluated “only” on the basis of “classroom teaching”. Student outcomes are not considered. Teachers’ contributions to “extracurricular activities” and school committee work may not be included. Teacher performance assessment involves limited measurement against subjective criteria. A board official reported that the evaluator: “sees a lesson and writes it up, and goes to the board and that’s how they judge your performance”. In his opinion: “this is insane”, but it is not easily overcome, since, “we’ve tried to get it changed...to a more professional growth review performance appraisal kind of model...but it isn’t mandated, and in fact is not legal according to the collective agreement.” Another board coordinator reported that: “as a teacher I could do whatever I want, go behind and shut that door and it didn’t ever really matter”, since performance was assessed infrequently and: “how was it being assessed?...gut feeling...subjective criteria”. A self perceived exception to this approach to employee performance evaluation was noted by board officials. A number of people explained that at boards, they: “do a formal review of how the key tasks were performed”, for “everyone from department head up”.
**Performance Orientation**

TLP employees appear to be concerned with both the delivery of project outcomes, and with the processes by which these outcomes are achieved. Experience has taught them that the realization of project outcomes in education depends on many process factors.

Outcomes are the self and cross perceived focus of employees in business. A line manager referred to the "targets" in "revenue", "customer satisfaction" and "employee morale" against which her achievement was assessed. In meetings, business people were noted to think and ask: "did I meet that desired objective or not?...that desired outcome...where is it?", and : "if the desired outcome is to come up with a piece of paper at the end of the meeting...do we have the piece of paper or don't we?". An educator remarked that: "you go to meetings and business people want to see outcomes, like who's going to do what?". According to a vice president, business is "extremely determined" and "results oriented" to the point that "sometimes we behave that way to our detriment". Business is noted to judge "another institution", "organization", or "culture" "infer(ing) things based on the outcomes or the external appearance of what you read and what you see".

According to a board official: "educators tend to be process oriented where they want to meet, meet, meet and never reach a decision, but make sure that everybody is comfortable". That education is strongly process, as opposed to action/outcome focused, can be seen in a director's remark that: "we like to talk, we like to analyze, we like to contemplate our navel and set up taskforces and study". It was also evident in a remark made to a board consultant who directed the question: "can we at least come to some decision?" to a superintendent who responded, "that's not necessary as long as we're comfortable". For a board coordinator: "the average teacher is not outcomes oriented or task oriented. The average teacher is process oriented". Teacher training is process focused. It was said that: "you don't get a lot of measurement and evaluation strategies and techniques. It's how to put kids into group work, you know, how to have quality circles". Educators are expected to deal with the 'how' as opposed to the 'what' of education, which is determined outside their control. A board coordinator explained that it is the government which says: "you shall teach within these confines and with this content", while the board is responsible for dealing with implementation issues. A line manager observed that in TLP meetings while
business people concentrated on the: “what do you do?”, educators tended to focus on the: “how do you do it?”. 

Numerous educators expressed the belief that while education has been and is processed focused, a greater focus on outcomes is being demanded, and a greater focus on outcomes in education may be expected to materialize. For example, a long time trustee believed that: “we are now much more moving into an accountability period because of society and focusing more and thinking in terms of outcomes”. She noted that: “in the late 60’s there was a change in education ...from the product to a process” and now, “we’re changing back and it’s going to be painful, especially for the teachers”.

BELIEFS:

Perception of Performance Measurability

TLP proposes to change how employee performance is assessed, from ad hoc, subjective evaluation to a more systematic approach following a ‘management by objectives’ model. Underpinning this new method of performance measurement is the assumption that any performance can be subjected to measurement.

Business people expressed the believe that any performance can be measured. As has been cited earlier, a growing number of business people perceive that even functions like public relations can be subjected to some sort of objective performance measurement. This belief was witnessed by educators from TLP’s steering committee, who referenced numerous occasions when business people would ask: “why can’t you do tests and assessment in education, why are you so much against this?”. A director recalled that, “when we started to say, ‘well there are many things we do in education which aren’t measurable’, business people would say: ‘like what? Why can’t you measure a change in attitude, or a change in value that a kid had here and now suddenly it’s changed...why can’t you be more accountable than that?’”

Educators appeared to believe that not all performance is measurable. According to a director, unlike business where: “you can see the widget made at the end of the line”... “we are not sure
happens to our young people 'til they get out in life. Will they make the transition? Will the skills they learned and attitudes prepare them well? The product of education is the question mark”. Another educator observed that, “we do a number of things in education around values...and attitude development that there aren’t tests for...tests aren’t standardized to measure all those things, and you wouldn’t get meaningful results”.

Perceived Risk of Poor Performance

Clearly for TLP employees there is a perceived high risk for poor performance. An employee has been 'let go' for not performing to expectation. For TLP volunteers though, there appears to be little personal or professional risk attached to their performance at TLP.

Business people expressed the belief that there is a high risk for poor performance. By formal practice, organizations which consistently demonstrate poor performance “go out of business”. One executive noted that if she didn’t “achieve” her targets, “I’m accountable and perhaps out of a job”. A board coordinator with previous business experience observed that in business, “certain behaviors are expected and certain standards of work are expected and you fall within that norm, or you’re out”. This belief in negative consequences to poor performance was reported to have been perpetuated in one organization as the 'moral’ of a widely circulated story. This story concerns the very much respected chairman of the firm whose stellar career, rising from humble beginnings, has taken on the mythological proportions of a legend. According to the executive raconteur: “the legend goes” that this chairman, “has a reputation as a ‘fixer’”. “He was sent into tough jobs and resolved them” and, “one of his first line jobs was (Division X) which wasn’t doing as well as it should have been doing”. “How did he manage to shake the place up? He said, “well I notice that you guys have all been turning down transfers and staying and you like it out here. Well, I just want you to know that there are five thousand guys (from another province) who want your job. So, if you want to stay here, we’ve got to improve our performance”. The executive closed the story with: “and they met and exceeded their performance targets over the next year”.

The risk of poor performance is self and cross perceived to be low in education. The skills of teachers are apparently not regularly nor comprehensively reviewed. Numerous educators
referenced poor teaching performance that was not addressed. And as for the performance of the whole system, as one educator put it: "whether all of our kids get into university or none or the kids get into university, the school system won’t cease".

**Definition of ‘Measure’**

TLP participants found that it was difficult, if not impossible, to measure or evaluate TLP effectiveness in terms of the four original mandates: readiness, retention, literacy and science and technology in the schools. It was found, however, that individual projects could be ‘measured’. In *Future Focus of the Learning Partnership* (1996) project managers are requested to: “provide feedback to The Learning Partnership on the benefits realized”. On projects where formal evaluations have been conducted, these reports tend to ‘document’ the project, the perceived value accrued, and how the project might be improved. Clearly, at TLP, the term ‘measure’ means ‘document’.

According to an educator on a year-long job exchange in business: “what (business people) mean by ‘measure’”, she explained: “is ‘document’. “What business people are saying is: ‘you’ve got to have some systematic information’”. “They stress that it’s very important when making decisions to make sure that you’re making the decision on the basis of as much factual information as you can get - rather than just intuition, or just guts, or just an ‘n’ of one’ sample”.

The above referenced educator on exchange noted, however, that: “to educators the word ‘measure’ most often means ‘to test’”. And educators are particularly sensitive to having their performance ‘tested’. She observed that: “I’ve heard educators and business people fight with each other about accountability and measuring”, and concluded that, “educators get their backs up when they hear business people yatter about measurement and accountability...because they don’t hear the same thing that the business people mean”.

**Acceptance of Performance Measurement**

At TLP, no resistance to, or argument against performance measurement has been observed.
Business people spoke about performance measurement in their sector as if it were a natural and expected thing. As one executive stated: “being measured goes with the territory”.

While people from boards appeared to accept measurement for their roles, all educators referenced a low acceptance of performance measurement by teachers. Measuring teacher performance, according to a trustee, is difficult because teachers do not start with “standard ingredients … there are many, many social effects that factor into the education results...many of which the classroom itself and the education system itself doesn’t have a lot of control over”. Business people recognized this lack of control in comments such as: ‘if you measure a teacher’s output, a lot of it has to do with their input, and if you get a whole classroom of students who don’t speak English as a first language, maybe you have a bigger challenge than if the whole classroom is students who come from a very stimulating environment. So to compare those two is not equal”. A line manager asked: “what happens in the classroom…You know it’s difficult to translate...It’s almost like social work - what happens? How do you translate that interaction? So there’s difficulty capturing it. This is not a reflection on quality. It’s not about that they can’t, or that they are doing it poorly”.

A board official offered another explanation for why it is that teachers tend to resist evaluation of their performance. He joined a number of educators and business people in the opinion that teachers fear performance measurement. This fear, he suggested: “is not so much that they may not end up being reasonable”. Measurement challenges a basic assumption or belief, echoed by other board people that, “it was always assumed that teachers knew what to do”. So, “if you set criteria to test it, there is a fear in teachers that they won’t show up ‘good’, when they believe they are ‘good’”. Consequently, “if you don’t show up ‘good’ in the testing, and you believe that you are ‘good’, then it obviously must be the testing”.

**CROSS-CULTURAL JUDGMENTS:**

By Business People About Education

Business people leveled numerous criticisms about education’s performance and its measurement. Accustomed to employee performance evaluation against measurable objectives and high
risks for poor performance, numerous business people judged that educators, whose practices differ, do not have "the same level of accountability". A president stated: "I'm paid to do a job and I will be hired or fired on the basis of the judgment calls that I make in my performance. Is that true in the school system? I don't think so". There were many references to: the "lack of proper performance measurement" in education. One executive gave the opinion that: "there's no review mechanism for teachers, so I could get them after they've done their grade six plan in 1963, and they haven't changed it until 1996 and they're just coasting". For a line manager, the lack of baseline performance measures: "makes it more difficult to execute change in education...because you don't have the measurement of where you are...it's harder to determine"..."why this is better than that", and "where you should go". Another line manager offered the criticism that: "the evaluation has always been on the learner, and has never been on the teacher. It would be like me saying: 'I didn't sell enough to customer X this year, customer X did a bad job'. That won't cut it with my management for more than two minutes". Given the norms of an outcomes focus and clear objectives that are internally determined, a number of business people sought the same from education, in comments like: "What's the output, what's the desired output? That's what educators have to get their heads around".

There was general dissatisfaction among business people regarding the quality of outcomes produced by the education system today. One staff manager observed that, "they just changed all the SAT scoring...ninetieth percentile before is now maybe a ninety fifth or something like that". A president stated: "is there enough evidence to support the statement that our education system isn't nearly as good as it could be?...based on everything I read...there's lots of evidence to support that". According to another executive, "you look at results. Are people happy with what they think they're getting out of the school systems? No." Speaking to the dissatisfaction among small business people about the skill level of current high school graduates, a banking executive explained: "they are tired of doing the product recall work of education".
Educators also leveled judgments on this subject. One teacher observed that, “with really enlightened people in the business world I still felt that there was very much of a sense of not understanding the whole issue of evaluation and testing”. In her judgment, business’s single focus on “standardized tests as being the critical and only part that was important” ignored evaluation for “learning”, to identify where someone was, and “adjust their next step based on where they are”.

Educators dismissed business’ negative judgments about the outcomes of education, saying they were not based on a current understanding of the environment. A director observed that: “everybody thinks they are an expert about education...because everyone has been through the educational system (they think:) ‘I therefore have the ability to comment on it’”.

V.6 POWER & AUTHORITY

FORMAL PRACTICES:

Type of Power Exercised by Management

The president and vice-president of TLP can, by virtue of their hierarchical positions, exercise ‘ascribed’ power over TLP employees. However, with members, volunteers and particularly with school personnel with whom they implement partnership programs, their titles alone exert little authority-currency. With those they are not charged to supervise, TLP management must exercise ‘achieved’ power. It has been evident that Gordon Cressy’s numerous contacts from the United Way, his political experience, and his long term relationships with various ethnic communities in Toronto have served to underscore his externally-perceived authority. And Lori Cranson’s long and successful teaching career underpins her proposals with a dimension of credibility that causes her to be perceived with authority by business people and educators.

Senior management in business exercise what may be deemed ‘ascribed power’. By virtue of their positions as senior officers, they exercise authority. In non-public companies such power is assumed by ownership right. In public companies, the power is officially transferred at annual meetings to
senior officers by the shareholders. Power, ascribed by virtue of position is also held by middle managers, who are “empowered to make decisions” for their particular section of the operation.

Power is shared in education. Professional management at school boards do not hold ascribed power. A business manager recognized that in education: “if you (try to) operate from an ascribed power base...then you run into, and you are dealing with, everything that’s in place - the rigidity, the union, the trustees, the union, the Ministry of Education, the regs...it’s a very prescribed system”. A director of education observed that: “if a director says, ‘I am running the show, hands off’ then it becomes a struggle with the board (of trustees) all the time”. To exercise power in education, senior management must therefore employ ‘achieved power’. This is best explained in the words of two superintendents: “you have to spend a lot of time, I hesitate to use the word ‘lobbying’ but that’s what it is”; and: “I hate to use the word ‘manipulate’, but if the director has prepared (the trustees) well, they will give him license to run the business”. A school department head summarized the difference between ‘ascribed’ and ‘achieved’ power in her statement that: “we control...in a different way. We control it with personality. A business person likes to control it with facts, or concerns or their title. It’s just different.”

It was pointed out, however, that the role of principal in education holds ascribed power like their middle manager counterparts in business. Principals’ power is ascribed by the external authority of legislation. “The Education Act spells out all the duties”, according to a principal, “and with those duties are considerable, considerable powers”. By way of example, another principal referred to his ‘gatekeeping’ power: “there are only a few people...who are allowed in the school. Everybody else comes by invitation. You can kick your trustee out if you want. That would be stupid but a lots of principals have tried to do that, or in fact have done it”. And it was noted by a board official that teachers may still, “put their children in rows and teach a common topic and a common piece of work to every kid in the class....current pedagogy dictates that that’s no longer acceptable. But some principals don’t choose to do that because they believe in the old ways”. School board management recognizes this power. A superintendent stated that: “you can have the most wonderful program in the world, but if the principal isn’t supportive of it, it isn’t going to work”. To overrule a principal, board officials must officially assume the title of ‘principal’. As one principal explained: “the superintendent ...does not run the
school...under the Education Act the principal is the one in charge of the school...if...they have to overrule a decision that’s clearly in the domain of the principalship, there is a procedure where they have to come in and take over the school as principal”. From a principal’s point of view, in board functions, like that of superintendent: “there’s no power....to be able to get something significant done”. Based on their ascribed power many principals hold the opinion that: “you’re not going to be told you have to do this and that”. However, it was noted that, “the principals are very powerful...when they take a position on something....but whether or not they can turn the (school) board...I mean they can on a lot of implementation issues. But it’s really difficult when the Ministry has mandated that something is going to occur”.

Mandate and Agenda Control

What TLP does, and when it is to be done is determined by senior officers of the organization, including members of the board from both sectors, and TLP’s senior management. There is no external source which dictates the partnership’s mandate and agenda.

Senior officers inside a company control the mandate and agenda of the business. “Targets” are noted to be set by senior officers of the company and by no external authority. However, in the case of government regulated businesses, the external authority of government can dictate that certain matters must be undertaken within specified time parameters. For example, television stations must, in order not to jeopardize their broadcast license, follow Canadian program content requirements in specified periods set down by Canada’s Radio and Television Commission.

Educators indicated that they have little control of their mandate and agenda. Education’s overall mandate and agenda is controlled by the external authority of government. According to a director: “ the Ministry says: ‘you shall teach within these confines and with this content’”. Another director explained that: “there are things that are mandated on the schools. You must offer it...’thou shalt do it’ says the Ministry....you have to do it...there is no choice. Eat it!”.
INFORMAL PRACTICES:

Acceptance of Authority

Top-down authority can be noted to be accepted by TLP employees. However, even if school boards sanction projects, TLP has no 'official' authority to implement those projects in schools, and resistance to TLP initiatives by principals and teachers has been accepted. Board people indicate that if a school doesn't want to participate in a TLP initiative, TLP should accept that decision, and concentrate on those that do.

As a result of ascribed power in business - authority, according to a line manager is "top-down". Power exercised from the top is generally accepted throughout business organizations. According to a line manager: "it comes down to everybody"... "You're expected to 'do this, by then' and people jump in line and move forward."

Business people observed, however, that: "in education they don't seem to be able to do 'top-down'...the people at the bottom are much more powerful...that you just can't say 'it will be this way' and have people move towards it." Educators recalled numerous instances where directives "from the top" were not followed-through. It was admitted, for example, that course outlines issued by boards, "weren't being followed" by some schools.

Extent of Reward/Penalty Tools to Exercise Power

TLP management has, inside the organization, the power to hire, fire, determine compensation, promote, demote, and offer incentives and perks which represent tools with which to exercise power with staff and suppliers. Outside the organization, TLP management has few tools with which to exert authority. Even the requirement for teachers to contractually agree to participate in the 'Hands-On-I.T.' project has not proved to be universally binding.

Senior business managers can exercise a variety of 'power tools' with which to exert their authority, such as: the ability to hire and fire, to set compensation levels, to promote, to reward, etc.
Senior educators at boards appear to have fewer ‘power tools’ than their business counterparts. They do not directly control and cannot vary compensation for most of their employees because they are unionized. Principals tend to hire and negotiate transfers amongst themselves. Individual incentives or financial rewards for performance may not be offered. Board management may promote and place principals, and board consultants, but only with trustees’ approval. For example, an individual ‘on leave’ from a board to work with TLP could not have the leave extended, even thought it was supported by the school board director, because the trustees voted it down.

**BELIEFS:**

**Expected Consequence to Resistance to Authority**

Although no challenges to ‘ascribed’ authority have been observed among TLP staff, it was confided that staff would not do so: “because they need the job”.

Business people expressed the expectation that if they resisted authority, they would “be fired”.

This was communicated directly, and indirectly, in statements like: “if you don’t jump in line and move forward”, thus challenging the power and authority of an hierarchical superior, “odds are you’re not going to be working there”.

According to a senior educator: “teachers are rarely fired, and if you want to do so there’s so much union red tape, people tend to be transferred instead”. In education, challenges or disagreements with authority are not expected to result in termination. All principals interviewed stated that the method they employed for dealing with a teacher who challenged or resisted their authority, was to arrange for a transfer to another school. And at boards, coordinators who “step out of line”, “go back to the classroom”.

**Preferred Locus of Authority**

TLP is an umbrella organization which amalgamates a large number of businesses and all area school boards. It is, itself, the embodiment of a belief in centralized authority.

Business people represented two different authority orientations - that of “head office
management", who value "control from the center"; and that of "branch plant managers", who "think
guys from head office are a pain in the ass, and don't have a clue about how to operate locally".

People from boards indicated a predisposition to central authority in comments such as: "we need
to have a much more standardized approach" or "the overall guidelines...must be established firmly
from a central position" For a number of principals, however, local differences demanded different
treatments, but as one opined: "there were always supervisory officers that wish the hell I'd go away, you
know, because you're going to cause them pain because it's different...because it was easy for one school
to do but that meant that 'are we going to get that same crap from everyone?'".

CROSS-CULTURAL JUDGMENTS:

By Business People About Education

Some senior business managers criticized the power of principals and teachers to resist top
management change initiatives. Others thought that top management in education 'perceived' that they
did not have the power, like that in business, to effect change. To these business people, the evident
powerlessness exhibited by school board managers should and could be changed with encouragement.
Witness the words of one CEO, speaking about a principal he was introduced to through TLP activities,
who had made major changes in the running of his school:

You come into a job, you know, running a business or running something in a corporation, you really do
have a fair bit of ammunition to change things. Whereas, I think a lot of people, 'principal X' is an
exception from the education system, and I go way beyond the education system, the not-for-profit sector,
government sector. They feel very powerless in terms of...they look at sort of the array of tools that I
might have in a private sector - performance for compensation, I can fire people, I can hire people. I can
do a whole lot of things that they at least perceive they can't do. Then you say: 'got a principal X who
does it'. But the principal X's are so much the exception ...The big challenge is to get more and more
principals, superintendents, whatever, feeling that they can do this...if you work hard at it you can
achieve some significant change.

According to him, a principal 'can do it', so senior management at boards 'can do it, if
encouraged'. Clearly, in spite of his long association in partnership initiatives with educators, this CEO
appeared not to recognize the different types of power principals and board people were allowed to
exercise by virtue of different formal practices. When presented with the information that while principals
hold 'ascribed' power, board officials must exercise 'achieved' power, and what that meant, the CEO admitted that he did not know that this difference in formal practices existed. And although he maintained that board management should exercise more power, he admitted learning that it would take more than mere confidence-boosting to empower board management.

By Educators About Business

The judgment was made that: "we have a wide variety of agendas we have to address in the community. We're not like a specific business that says: 'here's our product, folks, and we'll do it well and hope you'll come back for more.....(teaching's) not like (being) in a store or business situation where everybody has their own specific little job that they can control".

V.7 PROFESSIONAL DEVELOPMENT

FORMAL PRACTICES:

Recruit Requirement for Industry Standard Professional Development

There is no formal requirement for TLP management or employee recruits to have achieved specific certification from industry standard professional development programs.

New recruits to business are not formally required to hold industry standard credentials, except for those involved in trades such as electricians, or professions such as engineers. For the most part, business people are not required to complete a course of instruction in order to qualify for promotion into management. It was noted, however, that the MBA designation, while not always required, is valued, and large companies often financially assist those who pursue this designation. At TLP a CEO needed to recruit a substitute to assume his committee duties while he attended, at his company's expense, the multi-week executive MBA program at Harvard University.

All professional teaching recruits are required, by formal practice, to have successfully completed Teachers' College. To position oneself for the management positions of Vice Principal, Principal
and Supervisory Officer, or for subject specialist certification, the completion of specific qualification courses is required.

**Opportunity for On-the-Job Professional Development**

TLP employees have been involved in professional development during on-the-job hours. However, the P.D. parts of project initiatives in education have been scheduled to follow educators' availability. The Summer Institute Project has been specifically scheduled to occur at the end of August, after teacher holidays, but before the start of the fall term.

Business people noted that many of their professional development opportunities can be undertaken during on-the-job hours.

For educators, professional development activities are held after hours, in the summer, or on designated days when children are off school. On-the-job P.D. was reported to be difficult because teachers: “are with the kids all day long” and, “every time you get a teacher out during the day it costs $160. to replace them because somebody’s got to be with the kids”. At Boards, however, people do not generally have classroom responsibilities and professional development, therefore, can take place during the work day.

**INFORMAL PRACTICES:**

**Term for Professional Development**

TLP staff have developed a linguist-like capability of referring to P.D. as “training” to business people, and “in-service” when addressing an education audience, both verbally and in written materials.

Business people often used the term: “training” when referring to their professional development activities.

Educators use the terms: “pre-service” for professional development to become a teacher, and: “in service” to denote P.D. for experienced teachers.
Focus of Professional Development

TLP P.D. initiatives have focused both on how to ‘do it’, and how to ‘teach it’. In the ‘Hands-On-I.T.’ project, for example, teachers have been trained in how to operate computers, and ‘in-service’ work has supported how to integrate computer technology into the classroom curriculum.

When business people spoke about ‘learning’, the focus was primarily on the acquisition of business-related skills. At a meeting of TLP, speaking about a joint project to improve the computer literacy of teachers, a number of educators made comments about focusing on: “the affective domain”. Immediately, the body language of every business person at the table registered frustration, and one business person retorted: “screw the affective domain, what are the skills, damn it?”.

P.D. in education was observed to focus on the transmission and acquisition of education techniques and processes - how to ‘teach it’ over how to ‘do it’. An educator stated that: “even in your basic training program as an educator, you don’t get a lot of measurement and evaluation techniques...it’s how to put kids into group work, you know, how to have quality circle discussions”. Courses for promotion into education management were said to offer very little in the way of management skills training. A principal recalled that: “we learned a fair bit of curriculum development...but there was never any...really hands-on courses which prepared one to be a principal”. Principals found that many of the management skills they possessed were learned “on-the-job”, that, for example: “negotiation and mediation skills are seldom found in the principalship - they haven’t been taught”.

Recruit Induction/Mentoring Programs

New employee recruits to TLP are not provided with a formal induction program, nor mentoring. However, on a number of project initiatives formal volunteer induction programs and mentoring are offered. By year three of the Summer Institute Project, business volunteers were invited to training sessions to prepare them for their partnership role in this year-long project, and were assigned to experienced mentors for assistance throughout their partnership experience.

Some people from big business referenced their formal programs for new recruits. These indoctrinations were deemed to be important. As one vice president explained: “I think that the
assumption that we make is that every organization is different, or has attributes that make it unique (so) it’s important for the new entrant to understand what they are getting into, and to be able to make a decision up-front as to whether or not to join”.

Teachers’ College provides recruit induction and mentoring for the teaching profession. At the ‘job site’, however, according to a board official: “we don’t have, by and large, effective induction programs for new teachers”, and: “it’s usually just a ‘come and meet the board (of trustees) type of thing, with no real content”. It was noted that: “some schools have excellent mentoring programs... but that’s ad hoc...a lot of that has to do with the principal and the curriculum management team”.

Investment in Professional Development

Since its inception, TLP has increased the amount of professional development activity for staff, and volunteers.

An executive reported that: “business spends a fortune on education. Just formal training programs alone we’ll spend (at this organization alone) 80 million dollars a year”. It was generally noted that in business: “spending on P.D. is growing”. And an educator opined “in business they know they’re going to have to retrain people and it’s going to take big resources to do it”. One exception to this growth norm was observed. According to a banker, small business “can’t afford” professional development “and they’re not doing it. They do not train...They just can’t really take the time”. And small business interviewees concurred.

Investment of time and financial resources in educational P.D. was generally reported to be decreasing in education. Due to recent cutbacks, P.D. days during the year have been reduced. Mentoring programs at schools: “are no longer in existence”. According to one board official: “ the Ministry have simply not provided the resources for professional development”.
BELIEFS:

Perceived Value for Professional Development

That P.D. is considered to be necessary can be witnessed by the increased amount of time and resources TLP has committed to it out of a limited overhead budget. Another indication has been the recent decision for all TLP project participants to attend the Summer Institute Course, which focuses on increasing understanding of, and developing skills for, change management.

The belief was expressed that professional development is necessary for corporations and for business individuals, given the current climate of change from industrial to information focus. A line manager stated: "you're going to have to provide the kind of re-training, constant training or at least opportunities for the person to constantly train themselves to be able to adapt to new areas within the organization because, sure as shootin' this job or that job isn't going to exist next year". Some businesses have: “tied education development to the success of the company”, since it is believed that: “successful companies will have the ability to learn, adapt and produce with something brand new on almost a daily basis”. Various people from business echoed the notion that: “my industry has changed, and you really have to stay abreast and aware of what’s going on in the industry”.

The predominant attitude among educators about P.D. is that it is a discretionary matter. Only those who seek promotion elect to undertake the P.D. required. While the motivation to pursue discretionary professional development was noted to be high among new teachers, it was reported to be low among many principals and experienced teachers. According to a board officials with P.D. responsibilities: "you could never force a principal to take a course...some have pursued the training to learn new management things and some have not". It was also reported that: “there’s also a good degree of cynicism because of changing Ministry directions on a regular basis”; “there is a percentage of people who are totally cynical about professional development and think it won’t do any good...they know what they’re doing: ‘so leave me alone’”, and “the gap is widening....between unbelievably sophisticated teachers who are doing things that were not imaginable ten years ago, contrasted with people whose teaching hasn’t changed at all in fifteen to twenty years". Teachers’ professional development was
reported not to be of much concern to government. “The Ministry”, according to a board official concerned with P.D., “...say ‘here’s what we’re going to do, and then they just think it’s going to happen...The assumption seems to be in education that somehow the teachers will just know how to do it”.

Perceived Risk for Not Pursuing Professional Development

No staff at TLP have been observed to elect not to participate in P.D. activities. One may assume that there is a perceived risk in opting out. Among volunteers there appears to be no ‘downside’ to non-participation in P.D. activities at TLP. Staff do encourage educators and business people to participate, and attempt to give them information if they cannot attend specifically scheduled meetings.

The self perception by business people that there is a high risk for not participating in professional development was evident in opinion such as: “employees feel that if they don’t continue to be re-educated, learning new skills, they will have a short career...or they’ll be fired from the job because they were not willing or capable of moving up and continuing to grow”.

The perceived risk of not upgrading skills did not appear to be as strong among educators as it was among business people. Union negotiated regulations about teachers’ performance assessment do not include consideration of their discretionary professional development.

Definition of ‘Learning’

Not satisfied merely with the teaching of a course on how to deal with changing school culture, TLP’s Summer Institute Project follows the course with a one-year partnership between a school team and a business partner to, in fact, demonstrate their learning in a change initiative back at the school. Clearly, at TLP, learning involves the acquisition of knowledge and its application, both of which are believed to be important.

An educator on exchange for a year in the professional development unit of a major corporation which is known for it’s training expertise stated: “I’ve tried to say...(that the term:) ‘learning’ is not the taking in of information - it’s organizing, thinking about it, applying and adjusting, getting feedback from the environment, all those things together. They won’t buy it. So I’ve had to use the word
‘learn’ in a very, very restricted sense... They don’t see that by applying ideas you are learning. They define ‘learning’ as what you do before you apply the idea.”

Educators consistently presented a broad view of the term ‘learning’ including in it both the acquisition of knowledge and the extension of knowledge through application in practice.

**CROSS-CULTURAL JUDGMENTS:**

By Business People About Education

Among judgments comparing the professional development ability of each sector, business reaction was mixed. Some business people judged education’s knowledge about professional development to be superior to that possessed by business, noting that business “needs to take” this understanding about the learning process and “what works”, “and it needs to embed that into its businesses”, because: “business needs to be able to teach its employees”. Statements like the aforementioned tended to arise from people with firms that did not have highly developed P.D. programs. Alternatively, a representative from high tech business reflected the notion, also expressed by those engaged in professional development businesses, that: “I think it’s a fundamental premise that... some of the most exciting things happening in education today are happening in business in terms of innovative ways of looking at education and training and development...we’re not stuck with traditional views...the preservation of the status quo”.

People from business represented two judgments about the opportunity for P.D. in education. Some judged that: “teachers do have an awful lot of an opportunity to upgrade their skills...the summer break allows a lot more for that”. Others decried the recent cutbacks in the number of p.d. days during the school year, asking: “how are these people going to learn new tricks if you’re making it impossible for them to learn? No other industry would stick somebody for twenty-five years in the same place, behind the same walls and never let them out and then say: ‘now you must teach about everything that’s out there’, without ever letting them out there to know what they’re trying to prepare the kids for...that’s why so many of the teachers want to get into co-op education...they get to visit every business that their kids are placed in, in order to learn about the business”. This intent - for educators to be more knowledgeable
about business skill needs, and the implied desire for educators to fit their curricula to serve these needs, was reflected by many people from both big and small businesses.

By Educators About Business

Educator judgments about professional development practices in business were particularly critical. Numerous educators stated that business lacks an understanding of professional development, citing specific practices they have witnessed which led them to this conclusion. Comments included: they “don’t know much about teaching and learning...it just amuses me because here’s a private sector driving for the bottom line, and ...they haven’t figured out how to measure (their education unit) and yet they’re hot on measures for every other aspect of their business.” “They don’t measure that...if you’ve got these competencies, do you, in fact get higher performance?” “Training courses, this is about where they’ve had all their action”. It is one educator’s experience that at business courses: “people are just talking at the group...no interaction. It’s a set program. They don’t ask if you’re following this?, Do you want to talk to a colleague about it?, Are there any questions?. You just sit there and do it”.

An education manager, recalling her experience in business, stated that while business management “rhetoric” promotes corporate training effectiveness and boasts the pervasive adoption of standard practices throughout the organization, there are “pockets” of employees who “do not use” practices in which they have been trained.

And a director judged that: “companies have made a fair big financial commitment to the retraining of people as they have come into the business world....10% of their budget.” But “here in Canada, it’s well known, it’s about 1% or less”.

Educator Judgments About Education

A superintendent explained that the word “training” was believed to be a “business term”. “It is perceptions, it is a mind set (adopted by educators who believe): ‘We’re not business, we don’t want to be considered like business. So we don’t want to use their language’”. Other educators commented that ‘training’ was a term used for animals, not humans.
Criticizing the lack of recruit induction programs, an educator related findings from a board poll of recently hired teachers, saying: “the (new teachers)...were often, especially in the first couple of months, totally panicked...A lot of times they didn’t know things like -‘where do I park my car?’, or how to use the photocopier. One person came in and found that she had nothing. They had stripped her classroom bare. Like other people had gone through and taken (things)...because she was a new teacher and they figured she wouldn’t know any better”.

V.8 PROMOTIONS & REWARD SYSTEMS

FORMAL PRACTICES:

Upward Mobility Path

By 1996, TLP’s office staff numbered eight (8) full time, and eight (8) part-time paid and contracted employees. For such a small and relatively new organization it is not surprising that no formal policy regarding the promotional path by which one rises through the ranks has been established. In fact, only one promotion had occurred. The very capable assistant to Lori Cranson was promoted to take over co-ordination of the ‘Kid’s Muse Project’.

It was stated that the practice of formally prescribing the upward mobility path has been diminishing among businesses, particularly big businesses. For example, Courtney Pratt, Chair of TLP and President of Noranda assumed his corporate position from a background in human resources. Given the tradition for big businesses in Canada to promote senior officers from positions in finance and marketing, this appointment was considered to be “unusual”, but: “less unusual today than it would have been ten years ago”.

Upward mobility in education follows a prescribed path. It was reported to be “standard practice” for a director to be: “in every seat along the way”, from teacher to head to vice principal to principal to superintendent to director.
Industry Standard Credentials

At TLP, the single promotion made to date, cited above, was awarded on the basis of demonstrated ability, and not on the basis of particular industry credentials.

Businesses do not engage in the formal practice of establishing and requiring industry-wide credentials for management positions. Informally, however, the 'MBA' designation has come to hold a recognized value in management hiring and promotions, particularly in large corporations.

Specific, standardized credentials are required for promotion in education. Teachers must successfully complete Vice Principal, Principal, and Supervisory Officer courses in order to qualify for promotion into these positions.

Opportunity for Upward Mobility

According to Gordon Cressy, contrary to the current trend to "cut" people in big organizations, TLP represented a "building" opportunity. And, being in a growth mode, the opportunity for upward mobility has increased for employees.

Recent downsizing, particularly among middle management in big businesses, has limited the physical number of management positions available, thus decreasing the potential for upward mobility. However, in the small business sector, particularly in the "high tech" field, opportunities for upward mobility were cited to be "increasing".

An educator gave the example that: "if you've got 10,000 teachers in a large system...twenty superintendents and one director, proportions are such that few will be upwardly mobile".

Compensation for Management and Professionals

At TLP, compensation and benefits for all employees are not standardized; are confidential; are based on performance; and are determined annually. TLP is a non-union organization.

For non-union business employees, including managers and professionals, compensation tends to be individually determined, and benefits vary. The compensation for managers in different departments or divisions may differ. Compensation tends to be based on performance. Such arrangements
tend to change on an annual basis. It is the general practice not to publicly disclose individual compensation arrangements. However, recent regulations require large companies to disclose the compensation of their most senior officers.

In education, the compensation and benefits for teachers, vice-principals and principals was reported to be standardized through the formal practice of collective agreement, which is a published document "everyone can see". Compensation up to the level of director is based on: "length of service". Compensation arrangements follow the period specified by collective agreement. Educators noted, however: "there are directors... without a signed contract. There are directors who sign a contract. There are boards who offer them and don't offer them, and you just go in and you make your arrangement with the board". Directors' compensation is not standardized, is usually confidential, is based on performance, and is determined on an annual basis. On one issue, directors differed from their management counterparts in business. Directors share the same benefit structure as those who belong to the federation.

Board & Management Demographics

While TLP management is not male dominated, the board of TLP is. Directors representing education are, for the most part, white men. In physical number there are very few non-white male senior officers among the businesses involved in The Learning Partnership. And those who are, for example, female and non-white, generally preside over small businesses and not-for-profit organizations. One woman of color and the president of her own small business gave the opinion that, "I think for us as women, we always have to establish our credibility more than a male". While some at TLP have voiced concern about equity issues in hiring, promoting, and board recruitment, there is no formal requirement to do so.

Business boards and management are self and cross perceived to be dominated by white men. An executive admitted that: "I am now president of one of the largest companies in the country....I recognize that if I hadn't been white, able bodied and male, would I be sitting here? And the answer in the past is: 'probably not'". Although business has traditionally promoted and hired white males in
management, a number of senior officers stated that their companies have recently established formal equity practices in their hiring and promotion. This practice was particularly evident among businesses that are regulated by, or seek contracts from government.

White men and, during the last decade, a large number of women have been elected trustees. Education management was self and cross perceived to be physically dominated by white males. And while, "there are very few female directors", the number of females being promoted into middle management was reported to be growing, stimulated by the government's recent mandate that: "fifty percent of administration must be female". It was also clear to both sectors that in the education workforce, "of course there's a majority of women", a perception that is supported by the fact that: "seventy percent of teachers belong to the Federation of Women Teachers' Association".

**INFORMAL PRACTICES:**

**Criteria Determining Employee Retention/Promotion**

There appears to be a high correlation between performance and retention/promotion at TLP. One employee has been "let go" for not performing to expectation, while another has been promoted for performance that was perceived to be highly competent.

In business there is a high correlation between employees' performance and their compensation and retention. Superior performance traditionally earns a raise, bonus or merit increase. A superintendent from education recognized that: "in the business world, if this were the best person in the organization to run this program and the program were deemed to be a very important one, there'd be no question that that person would be retained". And an executive reflected the notion that in business: "you can do a while bunch of management things that (signal the qualities that) I promote and I recognize and I reward".

In general, compensation and retention are not performance-driven in education. The superintendent who reflected that business retained employees on the basis of "the best person" for the job, noted, in comparison, that education bases employee retention decisions on "LIFO". "Last-in-
First-Out", is a common business accounting term. It also represents the formal practice by which education is: "bound by a negotiated agreement" to downsize beginning with the last person hired. Generally, therefore, longevity holds precedence over performance as the criteria for retention. It also proves the basis for compensation. However, it was noted that promotion into and through education management is based "more on performance than seniority". Fulfilling the requirements to be Vice-Principals, Principals and Supervisory Officers does not automatically guarantee advancement into these numerically limited positions.

**Range & Type of Incentive Offerings**

A wide range of incentives are offered at TLP within its limited operating budget. Financial incentives are part of the compensation packages for the top two executives. Occasionally volunteers who invest significant time and effort in TLP activities have been granted small honoraria. Every participant in TLP projects receives an official, engraved document recording their name and project. Education and business members who give financial support receive an engraved document, which many have framed and mounted in display areas in their organizations. The Charlie Pielsticker Award was created to recognize an individual who has made a real contribution to partnership development in the GTA. People who have made financial or non-financial contributions to the organization are verbally recognized at board meetings and at the annual general meeting, and recorded in printed documents such as the newsletter, conference brochure, and TLP annual report.

There are a variety of types of incentives offered in the business sector: from individual to team remuneration, from financial to non-financial perks and recognition, etc..

Business people remarked that in education: "you can't use public money to incentivize people", and no educator referenced monetary incentives. However, non-monetary perks can be observed to exist in education systems. A director specifically pointed to his luxuriously appointed private office and meeting room as a "perk" and "not a bad spot to be". At school boards certain teachers are given the opportunity to hold, for a specified period of time, positions as consultants. Such temporary assignments
represent non-financial rewards for superior performance. Clearly, a narrow range of non-financial incentives and rewards do exist in education.

**BELIEFS:**

**Perception of Job Security**

- **T** It is clear that all TLP employees recognize that their jobs are not secure.

- **B** Among business people, the perception of job security is low, since continuing operate as a "going concern" is not guaranteed. Business people recognize that "I could be out of a job" and that "you’re only as good as what we were today".

- **E** A career in education was presented by a director as: "a very secure lifestyle". Comments recorded in observation notes revealed that it was highly unusual for a teacher to be fired. Fueled by the certainty of taxes, and therefore public education revenues, the perception of job security appears to be relatively high, especially among long term educators. Recent recruits however, given the 'LIFO' rule, do not feel as secure in their jobs.

**Valued Measures of Success**

- **T** While TLP must clearly rely on its volunteers’ value for intrinsic rewards, the leadership also provides extrinsic motivation, even if that is just a piece of pretty paper, or a slap on the back in public for volunteers, or a special Christmas lunch for staff.

- **B** In business, extrinsic rewards such as raises, bonuses and promotions were reported to be interpreted as measures of success. Business people reported, and it could be observed that while upward mobility signaled “success”, being “passed over” in promotion was perceived to be a sign of failure.

- **E** No educator referenced the offering of ‘bonuses’. Raises are not, for the most part, rewards for superior performance. Measures of success are primarily intrinsic. Speaking on the strength of some research he had read (but could not recall the full citation) by Allan King of Queen’s University, a
board official revealed that: "teachers tend to go in two tracks - the ones who really want to go into
the...supervisory area, and the others who really just want to look after their own classroom and be a good
teacher". Another mention was made that for those in education who do not choose the management
track: "it is not considered a sign of failure by any means for a teacher to be working at the same school or
even perhaps a couple of schools but over a long period of time". However, for education management,
promotions could be observed to be valued as the measure of success. A director indicated that: “I knew I
was successful by the feedback I was getting, by the promotions”. This relationship between success and
promotion he perceived to reflect, “the way that perhaps business people look at promotions”.

CROSS-CULTURAL JUDGMENTS:

By Business People About Education

Conditioned to performance-based compensation, and low job security, business people judged
that in education: “there isn’t much accountability because the money comes into (their) bank account or
(they) get their cheque on a regular basis”.

A line manager, referencing the prescribed nature of upward mobility in education, judged that
while business’s more varied and flexible promotion norms facilitated recognition and stimulation of: “the
new sort of behavior”, in education: “they probably still promote people out of the old behaviors into our
principals, our superintendents and maybe our directors”.

By Educators About Business:

Numerous directors judged that business leaders receive greater compensation than those in
education.

By Educators About Education:

Some of its own management admitted that in education: “you get paid no matter what”, judging
that: “there are a lot of people collecting pay cheques who aren’t earning it".
V.9 RISK-TAKING

FORMAL PRACTICE:

Structure For Risk

Neither TLP, nor its projects are risk-averse. For the organization and its employees there are no long term financial support or job security guarantees. And, for example, the project ‘Take Our Kids to Work’ takes risks in removing children from the classroom (some unaccompanied by parents) and dispersing them into the ‘foreign territory’ of businesses, populated by adults they may not know. One or two businesses have found that children can, inadvertently or deliberately, damage office property.

Any business venture involves risk-taking. There are no formal guarantees that investors will earn returns, and even their capital is at risk. By convention, the position of owner and shareholder equity appears last on financial statements, after other debts to employees and suppliers have been discharged. Since a future revenue stream cannot be guaranteed, employees cannot be guaranteed job security.

However, education revenues are derived from taxes. And although taxation was introduced by Canadian politicians at the beginning of the century as a ‘temporary measure’, it is now generally acknowledged that taxes, like death, are inevitable. Consequently, while the amount of funds allocated to public education may vary, that there will be revenues is taken as assured. And it follows that if there will always be taxes and budgets for public education, there will always be a need for public educators. Other structural factors besides guaranteed revenues and position security contribute to education’s risk-averse nature. These were best put by a business line manager who commented: “Education is a highly regulated environment, highly unionized environment, and a publicly not transparent, but publicly accountable environment, small ‘p’ politicized. That ain’t a recipe for risk. That ain’t a recipe for radical change. And it’s people’s children!”. Educators themselves admitted that education as a “system” that is: “not set up to take risks”.

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INFORMAL PRACTICES:

Orientation in Language and Behaviors

While TLP and its projects involve risk-taking, in practice, everyone involved in TLP demonstrates risk-averse behaviors. The board and staff are very careful not to financially over-extend the organization. Board stewardship regarding financial and insurance matters is vigilant. Fund-raisers attempt to secure multiple year commitments from members. The TLP board and its project committee takes the risk of authorizing that projects should be undertaken. But they have attempted to minimize poor or incomplete decision-making by establishing and following guidelines that identify the criteria by which project suitability should be judged. Extensive planning is undertaken for every project, and most projects are put through a ‘pilot’ involving only a few participants before the project is rolled out. The TLP project to bring thousands of community mentors into schools has been in the development phase for years, without even being field tested, in part, because of the risk of a potentially negative child-adult relationship. And during the implementation of projects into the school system, a propensity for risk-avoidance is maintained. Permissions are rigorously sought. TLP will not pursue a project with any part of the education organization without classroom teacher co-operation and input, and without authorization confirmation from higher authorities.

Business people generally appeared to embrace risk-taking. They exhibited language like “just do it”, “let’s try it” thereby promoting risk-taking. It was noted that for big business: “it’s something to say we need to take more risks - don’t worry about the repercussions or who’s going to give approval, let’s just go and do it and we’ll worry about the backlash or whatever later”. This comment, in context, reflected two informal practices. The traditional tendency for large firms to be more risk-averse than small concerns. And the growing tendency, brought on by the recession, and increased competition, for large firms to undertake more risk-taking. Many business people cited examples of big businesses in the financial services and technology sectors which have recently undertaken bold and risky undertakings, when the: “status quo’ was no longer delivering results”.

Educators, on the other hand, generally appeared to be risk-averse. At TLP committee meetings,
they appeared unwilling to undertake a new effort until the project was thoroughly investigated, long after many of the business people had recommended that it be attempted. It could be observed that educators often asked for time to "check through" or "check with" regulations, senior officers or other sources prior to giving the 'go-ahead' to an initiative. Many examples were given to underscore the notion that educators, particularly at school boards, demonstrated risk-averse language and behaviors. A trustee observed that education directors can take risks only if their board supports them. And trustees were observed to create regulations to avoid deviant, independent action and to reprimand those who do so. For example, a director cited an instance where a principal had used partnership funds for a staff field trip that was criticized by trustees. He reported that the response to this situation was for the board to reprimand the principal and to create a guideline regarding the use of partnership funds that would apply to all schools. A principal reported that when he returned to his board with "new ideas" which they had encouraged, he was met with "Oh, we haven’t done that before, we can’t do that". And consultants at boards who take risks "outside the bounds", "go back to the school".

**BELIEFS:**

Rationale for Risk Orientation

TLP, being risk-taking in nature and risk-avoiding in practice, appears to embrace both approaches to risk, each appropriate to a different side of the operation. Pursuing outcomes requires risk-taking, but implementing projects in education requires one to be risk-averse.

Business people appear to believe risk-taking is necessary, in comments, even from individuals with large corporation, like: "you’ve got to take risks in business to survive".

Clearly, public educators believe in being risk-averse. It was reported that risk-takers in education “make some enemies”, must “have a track record of past successes” and need to have “allies, especially with the trustees”. Some Directors, in conversation with business people, could be overheard to say: “I’d like to try that, but the regulations don’t authorize me to”. And one Director queried: “where am I going to get the money? After we pay the overhead and the salaries and the bussing, I have little money
left to try new things...and then the Ministry says: ‘you need to cut the budget further’!” Consequently, educators appear to believe that it is difficult to muster the support, authority and resources to take risks.

**CROSS-CULTURAL JUDGMENTS:**

**By Business People About Education**

Business people judged that in education: “the system” and “people don’t take risks”. They did acknowledge that with children risks should not be taken. However, business people judged that education’s “eighteenth century, moribund structure and operation” which needed “streamlining” and “updating” remained so because management: “won’t take the risk to change”.

**By Educators About Business**

Educators judged that risk-taking was, for business as well as education, more prevalent among senior managers. “CEO’s” and “directors” were deemed to be able to “take more risks”, but it was noted that in the case of the latter, trustee support was essential.

**V.10 ROLES & RESPONSIBILITIES**

**FORMAL PRACTICES:**

Organizational Roles

TLP’s role has been formally articulated in the document: *Future Focus of The Learning Partnership* (1996). Among the many responsibilities specified, two types of roles are equally represented. A social role is indicated by the statement: “we promote relationships and networks, by encouraging the interaction of educators, business people and community leaders with common interests in enhancing student learning”. And an economic responsibility is signaled by: “we raise funds for core projects The Learning Partnership will lead”. Neither of TLP’s economic or social roles is secondarily positioned to specialists. The partnership initiatives and the resources to support them have been of equal concern, not only to senior TLP officers, but to project coordinators and volunteers. While specialists such
as a professional fund-raiser and the brokers of Scotia McLeod have been recruited to assist in generating donations, such specialists have not formally assumed the total financial responsibility.

The primary role of any business organization was noted to be economic. As a president explained: "companies have a job, regardless of the product or service produced, and that is to make money, because money is the engine that drives everything else". And an executive remarked: "business has always been driven by 'bottom lines', 'profit'." The financial needs of the company are perceived to be more important than the organization's service to the community and its needs. One education director explained that: "people in the business world do have a sensitivity and a caring and a community responsibility, but I think that when you're paying the bills and you are directly accountable...there are more urgent concerns". While the concern for financial matters was reported to be: "front and center throughout a company", many businesses were observed to physically isolate their community relations into specialized departments. According to a president: "I think most corporations have geared their external relations, community involvement...and given that charter to HR or government relations. Say 'O.K. you guys go figure that out'." However, among a few businesses, social/community responsibility was not reported to be segmented to a single department, but was stated to be a more pervasive company concern. For example, a president stated that his company's role was not simply to serve customers' material needs, but to reflect "a more holistic view of customers' needs" including customer and community "values" in what they did, and how they did it. None-the-less, an HR executive gave the opinion that he, and many of his colleagues felt that their role as "an intermediary", "between the organization and the outside world" was: "atypical of business".

Education organizations fulfill a social role. There are, according to a director a: "a multiplicity of demands" that education is, "expected to accomplish by society" including: "the care, the treatment, the social work, the psychological aspects...all of the pressures on families today, particularly with the economy. All of that comes to the classroom". A business vice-president recognized that educators are asked to be: "a social worker, a caregiver, a paramedic...a guerrilla soldier, a teacher and on and on all rolled into one". In education, "our social function" was noted to permeate through all levels of the organization. However, it was reported and observed that financial concerns, which have usually been
segregated to specialists at board offices, are now occupying the interest of board officials and principals who are seeking ways to replace recent government funding shortfalls.

Affiliation Status of Management/Professionals

TLP management positions are not unionized.

The role of management in business is not unionized, and while professionals, such as engineers often belong to an association, such groups do not generally engage in collective bargaining activities on behalf of their members.

In education the roles of principal and vice-principal are unionized management positions¹. They belong to the federation since they are formally included with teachers as participants in collective agreements, but legislatively they are deemed to participate in management. It was explained that: “principals are still what you call a capital ‘T’ teacher, even though they are in a leadership role...they are still within the bargaining unit...they have a right to participate in a strike vote, but then, if a sanction is used they cannot strike - they are seen as managers under Bill 100.” It was reported that this dual allegiance creates a situation whereby principals: “are sometimes schizophrenic...they’ve got their feet in both camps”. Directors and superintendents however, hold non-unionized, management roles.

INFORMAL PRACTICES:

Clarity of organizational role

TLP’s economic role appears to be clear and accepted by all staff and participants. However, its social role, as Ewing found in his 1996 poll, has and continues to attract various interpretations.

While different levels of any business hierarchy might, according to a line manager: “disagree on the numbers”, there would be no disagreement that “making money” is “the primary role” of any

¹ Since this writing, legislation has been passed in Ontario that removes Principals and Vice Principals from union membership. However, a clear affiliation with management has not yet materialized.
Education's social role is not, apparently, clear. Both inside and outside education there is a long tradition of much “debate”, according to self and cross perceptions, about the nature of education’s social role. This debate was evident to a business line manager who recognized that: “there is a very, very fundamental split about education for what? Are we educating for life and for you?...or are we educating so that you fit into the business world?”. A board official referenced: “a big debate” in education between, “the traditional liberal education and there’s the responsibility to make sure that people are employable as well”. He stated that because of change in governments: “the pendulum has been swinging from totally content based curriculum to content and skills and values and the issue is where is that pendulum going to stop swinging?”.

Board and Management Role Designations

Members of TLP’s Board are called: “Directors”. Originally, the leader of MTLP was proposed to be called: “Executive Director”. However, the title Gordon Cressy assumed was: “President and Chief Executive Officer”. And recently, Lori Cranson, program director, was distinguished with the new title of: “Vice-President”. Other staff designations include: “Manager” and “Coordinator”.

The leader of a company is traditionally titled: ‘CEO’, which is interpreted to mean: ‘Chief Executive Officer’. In some larger companies, the leadership role is also shared with a ‘COO’, or ‘Chief Operating Officer’. And the senior accounting role is designated as: ‘CFO’ or ‘Chief Financial Officer’. Hierarchical role designations subordinate to the leader in rank order include: ‘Vice-Presidents’, ‘Managers’, and ‘Supervisors’, to which specific departmental designations are usually assigned.

‘Directors’ are the titles assigned to stewards who serve on corporate boards.

Traditionally, the leader of a board of education is titled: ‘Director of Education’. Management role designations subordinate to the board leader in rank order include: ‘Assistant Director’, ‘Superintendent’, ‘Principal’, and ‘Vice-Principal’. Stewards who serve on school boards are titled: ‘Trustees’. It was pointed out that, recently, a number of Toronto GTA directors have adopted or, “like to be called the CEO”, which was interpreted by one director as: ‘Chief Education Officer’.
Management Style

TLP management has not been observed to demonstrate autocratic, controlling behaviors with staff or volunteers. Democratic processes and teamwork appear to have been encouraged.

It was widely reported by business people that the style of the management role has changed from autocratic to democratic. A line manager stated that the military model: "where the boss knew everything and...you barked orders and people just did things"... "that's totally gone". A president remarked that: "it used to be that the store manager waited for the district manager who waited for the sales manager...for...weekly instructions. Now we have leadership teams." Another line manager explained that: "managers have moved from being 'all knowing' and making decisions to becoming 'facilitators', encouraging their employees, helping them to have the right knowledge and skills, and knowing who to go to...and teachers are moving to the same role".

Education was noted to be moving away from being: "repressive, authoritarian and regimented". A board official observed that in most schools the traditional role of the principal as "curriculum expert" has been replaced by "curriculum management teams...that identify what their initiatives are, how they are going to do it, how they are going to evaluate it, and what kinds of staff development...they need to support it". This has had an impact on the school board role. Where previously, "we said 'we're running a workshop on (topic X) show up!'..."Now, it's the school saying: 'we need help in this area, what can you do to help?'...Not just top down, but bottom up. Big change!". It was explained that the role of the principal is now: "seen as more of a facilitator who's very skilled at group dynamics". However, at some schools authoritarian behavior by principals and teachers was noted to be maintained. And, some principals have not embraced teamwork. For example, principals were cited who still followed the "traditional" practice of giving the vice principal "all the garbage jobs"- like "discipline", "timetable" and "all the yard duty", instead of allowing them: "to get more involved in the running of the school" as a: "principal-in-training". But, "vice principals don't say much because they want to be a principal", and their role was described as: "you can't wait to be one, you can't wait not to be one".

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**Locus of Role Conflict**

At the first meeting held between the directors of education and senior business representatives to discuss Charlie Pielsticker's systemic partnership concept, Ned McKeown observed a level of discomfort among some directors who clearly thought that TLP's role might conflict with their own partnership development activities. Later, some partnership developers at boards through their 'Toronto Area Partnership Network' were motivated to establish a formal “division of roles” between themselves and TLP. And a number of what were termed “heated discussions” occurred between at least one board partnership developer and TLP staff. Territorial role conflict does exist therefore, between the local board partnership role and the systemic role undertaken by TLP.

Conflict was noted to occur in business between senior and middle management roles. In the opinion of a corporate president, the middle management role in business poses “challenges” to senior management’s change initiatives. He stated that: “the blockers to changing the company tend to be middle level managers...just below the executive office to just above the supervisor level, first line manager...that group is the hardest to get things going, but it’s also where the things have to take action...and boy, they’re not necessarily trained and that is not the skill set that probably got them their job in the first place”. A president observed that senior management’s concern with “big picture issues” concerning “the whole organization” could be observed to conflict with plant managers’ “local concerns”. Superintendents and principals admitted to the occurrence of role conflict between boards and principals. Many board people were obviously frustrated by principals who would not cooperate with board initiatives, including TLP projects. A principal noted that principals and boards: “come into conflict... on 101 different issues” due the different roles each serves - one focusing on “the system”, the other attending to a specific school situation. And one principal stated that: “the board would rather have (principals) out of federation so they can say: ‘here’s what you’re going to do. If you don’t...you’ll like your replacement’.”
BELIEFS:

Role Affiliation

At TLP I perceived in many of the people who were most intimately involved, a strong commitment to the boundary spanning role. Their affiliation was stronger with the 'sum of the parts' than it appeared to be with either of the 'parts' alone. Some educators involved in TLP actually expressed the opinion that they "didn't really fit" in the roles in which they had served in education, but something about the business-education boundary spanning role proved somehow more satisfying. A number of business people involved in TLP were concurrently involved in professional transitions - having retired, having been let go, or intending to leave their positions. And it appeared that in the TLP environment they found that their skills and abilities were valued in a way that they were no longer in the business world.

Business people demonstrated a strong and fundamental affiliation to their role over any other. Many of them took the opportunity to defend businesses' contributions to society against alleged criticisms made by teachers. An executive stated that business people believe: "without us nothing! We create the jobs that builds the money, that builds the houses, that feeds the kids and gets them to school on time, creates the society that can afford to even build schools and hire you (educators) in the first place".

Educators appeared to genuinely believe in the paramount value of their role. An educator explained that: "I think it's very important for companies...to succeed...very important to the economy...I buy the need for success. I just don't have a personal commitment to it. I don't much care if they've got 14% or 17% market share...but with my area there's a very personal connection...I give a damn if government and education succeeds...public education to me is of vital importance...I've worked (there) for 27 years and I've got a very strong commitment to it. And to me it's of great societal importance". And a business executive perceived that educators held the belief that: "if you could somehow rank order all the contributions to society, education has a higher rank to us than business does".
Perception of Skill / Function Similarity

TLP management demonstrates skills consistent with the 'management' or 'administration' role, such as: leadership, planning, managing through others, budget concerns, a global perspective, a focus on outcomes, and concern for efficiency and effectiveness of the whole organization's efforts. It is clear that the two senior officers perceive themselves, and are perceived to be similar to others who hold management and administrative positions.

It was self and cross perceived that there is a strong similarity between the skills and functions demonstrated by business and education managers - particularly senior managers. All senior business people noted that CEO's in business and directors in education have similar roles and "business-like" functions. They recognized that educators "at the highest level...(people who) run... whole systems, you don't see that much difference"... "So when you talk to them they have the same, very similar generic concerns as business people". According to a president: "for both business and education today's reality is the same - you've got to manage through others, you have budgets to worry about, you've got...deliverables that people are expecting". Today there are: "pressures to do more with less" and, "your perspectives are more global and not just local". It was also observed that senior people must "think about scanning the horizon", and are not involved in "day-to-day" operational matters. Another executive stated that senior educators: "would talk maybe the same principles, maybe not the same language in how to get it, but they would be talking about structure... efficiency... effectiveness". According to a president: "CEO's... don't take a project and drive it themselves from top to bottom...you have other people who are more project oriented that have to take it". It was observed that middle management's role in business, "like superintendents" is to implement senior management directives. And plant managers in business "like principals" were noted to be responsible for the staff, operations and facilities under their supervision. Business people concluded that senior educators from boards view their roles and responsibilities, "almost like a business". This phenomenon of similarity between business and education management was explained by a CEO, who opined that management roles in any and all organizations are similar, because: "the more responsibility that you get, the more businesslike you have to become."
Every senior educator interviewed cited only “similarities” between themselves and their counterparts in business: “in human resources issues”, such as: “leadership skills ... flattening your organization”... “long range planning” and other “concepts of good management”. A superintendent echoed business people’s notion that the middle management role, in both sectors, involved implementing senior management directives. She stated that she had, “to be responsible for implementing policy”

acting as a bridge between schools and the board. In the case of principals, educators noted similarities between their role and that of plant managers in business. Principal responsibilities were said to include being: “responsible for the school”, “looking after safety and supervision of the plant ... ensure(ing) that the place is well supplied ... and helping the teachers to be more effective”. Principals spoke of their role as a management function, referencing: “all of the things we’ve learned from Tom Peters and so on in terms of business management” and how they had, “implement(ed) some of those things into schools”. An affiliation for the management role was reflected by an educator on exchange in business who observed that both she and her business counterpart on exchange in education felt a sense of personal loss now that they were removed from their former middle management roles. She stated that: “both of us have been managers ... and we’ve both had difficulty getting used to the consulting role ... but the role of ‘manager’ - being responsible for the outcome of the projects - I miss that”.

Rationale for Change in Management Style

Business people ascribed the change in role by those in authority, from authoritative to collaborative; from ‘knowledge keeper’ to ‘knowledge facilitator’ to the explosion in knowledge occasioned by technological revolution. A line manager expressed this belief in the comment: “it’s the same everywhere ... knowledge is just becoming too expansive ... more than what one normal person can keep in their brain, so the most recent knowledge is probably ... learning how to facilitate, collaborate ... those are the kinds of skills that people have to learn, but that’s happening with teachers, and I can tell you for sure it’s happening in business.” According to a business executive: “the reality is, as organizations have downsized and become flatter, you cannot know more than your employees ... nor do you have to pretend you do”.

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An education department head reflected on the impact the “knowledge revolution” has had on education roles, explaining that: “The way it was, the teacher stood at the front... gave out the information... they learned it... gave it back. And it’s killing some teachers now because now you don’t have to know anymore, you just have to guide... we’re not an information reservoir... we have to realize that we don’t have all the answers... we can’t have all the answers”. The change in style from ‘autocratic’ to ‘democratic’ in organizations reflected a change in society as a whole, according to a teacher, who observed that: “we’re different now... at home... in business... and in teaching... at home with your children you say ‘O.K. this isn’t working, what are some solutions?’... you didn’t have to think on your feet before, it was all in the manual.... But in any of those places it didn’t used to be like that”.

**Perception About Affiliation Status of Professionals**

While business professionals, such as engineers, involve themselves in associations, it was explained that their role as ‘professionals’ positioned them and their associations ‘above’ unionism which was considered to apply to those of ‘lesser rank’ such as “tradespeople”.

It was reported that: “teachers’ federations have never been members of the Canadian Labour Congress or the Ontario Federation of Labour... Historically, they’ve seen themselves as professional association and somewhat above trade unions”. A Director of Education explained that teachers became unionized because: “essentially what was happening is that there were unions that were trying to sign up the teachers, and the only way to prevent that was for the association to become unions themselves - because you can’t raid another union.... It was a defensive tactic”. And in his opinion: “Are groups of people professionals as a group, and to say that they are a union, is that contradictory? Is it an oxymoron? I say it’s a function of the leadership of that group at that time.... And if you have very militant people who are there, you will have a union, and if you have people who are not as militant, and not as dissatisfied... probably what you might call an association. And it varies with the leadership. And it will vary, for instance, (between) elementary and secondary schools... and from board to board... Look where (the) problems are.”
Perception About Business Role in Education

Clearly, TLP’s existence supports the belief that business has a role to play in public education, and that the public education role requires business involvement and support.

Business people concerned in this investigation clearly believed that business has a role to play in education, and education’s role requires business involvement and support. However, not all businesses have become involved in partnership efforts, and there are numerous companies which have resisted becoming TLP members, even after strong recruitment efforts. Therefore, alternative perceptions do appear to exist.

The majority of educators involved in this investigation clearly believed that business has a role to play in public education, and that education’s role requires business involvement and support. However, Charlie Pielsticker’s experience at Park Elementary where his partnership efforts were frustrated by trustees; Ann Vanstone’s similar frustration about partnerships; the resistance by some principals and teachers to TLP initiatives like “Take Our Kids To Work”; and resistant efforts by some unions and union members all point to the existence among others in education of a diametrically opposite point of view.

CROSS-CULTURAL JUDGMENTS:

By Business People About Education

A business executive judged that, for some teachers, “the way that they teach people how to learn is one which: ‘I’m the god or goddess and you learn from me’, as opposed to teaching kids that the life cycle of what you’re just learning is about this (index finger and thumb indicate small amount) long, and what you have to learn is how to constantly learn”. Another business person who had observed teachers interacting with students on many occasions, gave the opinion that some teachers cannot “handle” “how to give away control”.

A senior executive from a firm where many of the employees held professional status remarked about education that: “you’ve got a phenomena that just absolutely defies my mind and that is the
unionization of professionals. That, to me, is an oxymoron”. Based on that to which they are conditioned, business people judged that union membership compromises teachers’ standing as ‘professionals’. One president remarked that: “teachers are saying ‘we want to be respected and treated as professionals’, but on the other hand ‘I want to act like a union member’”.

A vice-president stated that “a bias against” business can be observed among teachers who: “joined teaching in the late ’60’s and they’re very active in their teachers’ union and they got into teaching because they didn’t want to have anything to do with those big bad, you know, free market types and...business is...bad”. A CEO stated that his discussions with his children about “what they were taught” revealed that some of their teachers had promoted the notion that: “it’s the business community that is building these plants and ruining the environment. Business doesn’t care”. This led him to judge that: “there is a definite leftist viewpoint in teachers”, who fail to recognize that businesses can value a social consciousness and still “work for profit”. For him “there is a place that is the connectiveness of the two - (but) without the engine you can’t have a caboose”. And it was noted that business’s role appears to be distasteful for many educators, particularly teachers. A line manager opined: “that the notion that working for profit is somehow dirty and beneath (educators) is, I think, one of the things that they use in order to give themselves, like emotionally, to give themselves a kind of...prestige”.

An executive judged that teachers resist the reality that their sector is a business. She stated that: “when you say, well, you’re really an industry, you’re really a business, why do you think you’re different? They resist that”.

A corporate president criticized educators who use their role in serving the needs of children as a ‘cover’ to protect self-interests. He said: “At the moment in the school system you’ve got the teacher who says, ‘I want my job’, and you’ve got trustees who say, ‘I’ve got a budget to balance’...they all use the kids as a reason for what they do, and it’s an absolute lie. They are in there to protect their turf.”

Numerous business people judged that education’s role should be to prepare students for the workplace. A president explained that: “Every kid that comes out of grade 12 has to have a job. Now maybe they might not get to the job before they’re 24 and through university, but there’s nobody whose going to be a ‘professional K through 12’ in this world. They’re going to move onto something else”.

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By Educators About Business

A senior superintendent judged that, "when you talk to the teachers, as against a worker in another area...the teacher tends to see the role as more of a career and a mission than as a job." Teachers were reported to choose this profession, and remain in it based on their concern for children and young people. As one principal rhetorically questioned: "How the hell could you exist in the classroom today with all the issues and problems if you didn't care about kids?"

A superintendent pointed to the strong belief among some teachers that their role is not to serve the employment needs of the business community. He observed that on social occasions he had witnessed business people criticizing teachers for producing high school graduates who lacked skills that were useful for business. He noted that: "the teacher would probably say, 'our job is not to provide you with workers who will simply do your bidding. Our job is to provide thinking individuals who can make judgments as they go through life and we will give them the tools to do so'". Two interesting statements were made supporting the notion that preparing students for the world of work is not, in teachers' minds, a focus of their role. A senior superintendent stated: "the fact of the matter is that most people in teaching do have university as a goal for their own children...so how do we then prepare a young person for the world of college or the world of work or for some alternate kinds of career...when we, ourselves are not as open to where we want our children to go?". And a board official stated that: "the area that we've never focused on, and this is where there's a revolution going on right now, is to look at the other 83% of the kids who don't go to university and say 'what are we doing for them?'...rather than letting them drift out there, and how are we preparing them?".

A department head made the telling admission that, one morning she was at a TLP meeting, sitting across from (businessman X), and, that evening: "when I was reading the business section (of the newspaper) and there's that same face smiling out at me, you know, and I am somewhat overwhelmed by the importance, or how you can get to be important in business. Sometimes I really wish I'd gone into business because I could have been a 'somebody'. I really feel I could have been a 'somebody', and then I think "well I am a 'somebody'. you know, in my own little job here".
A superintendent judged that: “central office (a.k.a. ‘the board’) is a ...business operation”...”we go to meetings”, “we talk on the phone”, “we do correspondence”. Their concerns, like those of senior business people were perceived to be broad based. One educator noted that: “I’ve had a ‘system view’ for fifteen years”. A director admitted that “if you’re in a school everyday, you know what’s going on, but if you’re in the board office every day, you don’t...directors know more about boardrooms”. Senior educators’ lack of involvement in “day-to-day stuff” was seen as “a corporate structure in itself.” It was explained that: “the director of education will talk to a CEO...and they talk the same language...that’s because they are talking at an organizational level”. Many individuals from boards cited the “business” nature of their roles, and observed that while business-like functions existed at boards, this was not the case at lower levels of the education hierarchy. A superintendent opined that: “there’s more similarities” between boards and businesses, and “more differences than similarities” between boards and schools, because: “the further away you get from central office, the fewer similarities you will find”.

V.11 STAKEHOLDERS

FORMAL PRACTICES:

Criteria for Stakeholder Recognition

T Business entities that are recognized as stakeholders in TLP include only those which are paying ‘members’ of the organization. However, all boards geographically resident in the Toronto GTA are considered to be stakeholders in TLP, even if the board does not directly fund the organization.

B When addressing the issue of ‘stakeholders’, business people invariably cited: “shareholders” and “customers”. Owners or shareholders and customers represent business’s sources for financial capital and revenues.

E The stakeholders in any particular education system are deemed to be those who reside within a particular community - for example, the ‘Toronto’ Board of Education. By virtue of the formal practice of taxation, every community’s taxpayer is a stakeholder in its education system, and everyone in
the community is recognized as a stakeholder even if they haven’t paid taxes or voted for the government in power who directs the system’s operation.

**Titles of Organizational Stewards**

**TLP** stewards are referred to as “Directors” who serve on a “Board”.

**Business** stewards are called “Directors”, who serve on a body called a “Board”.

In **education**, “Trustees” are elected to serve on a “Board” of Education.

**Frequency of Stakeholder/Board Involvement**

Since a year after its inception, TLP has invited its stakeholders to attend an annual meeting. According to the tenants of the document: *Future Focus of The Learning Partnership* (1996), in any one year, the board meets 4-5 times, the management committee meets 8 times, the finance and audit committee meets 4 times, and the nomination committee meets 2-3 times.

Business shareholders are required, by law, to meet annually. In most businesses full or sub-committee meetings of the board occur approximately once per month.

Stakeholders in education - the public, votes, generally, once every four years. Trustee boards in education meet a reported: “twice per month”.

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Authority to Run the Organization

The hired management of TLP has not been granted the authority to unilaterally act. The running of TLP is shared between management and the board, in particular, with the management committee of the board which is designated as: “the leading decision-making body” in the document: Future Focus of The Learning Partnership (1996).

In public companies, shareholders formally cede operating authority to officer-managers at annual shareholder meetings. As one vice president put it: “the shareholder legitimizes, for a period of time at least, that senior management can fundamentally call the shots”, giving management: “the right to say ‘screw you, this is the way we’re going’”, to any interest group which seeks to influence or control the corporate agenda.

Education management is not granted ‘blanket’ operating authority by stakeholders. Education managers must share the running of the education organization with the government in power, and with school board trustees, who, by virtue of their election, are authorized to represent the public as a whole. It was stated that work is suspended at boards of education: “just before” and: “right after an election” because there is “no point in trying to do something”. Clearly, the system is structured such that the work of education management requires trustee involvement.

Board Member Selection Process

TLP’s first board members were recruited by the steering committee. Now, recruitment for the board is the responsibility of the board’s nominating committee. During TLP’s first few years, potential board members were ratified by the standing board. In recent years, they have been presented as a slate at the annual meeting for ratification by the membership.

Although it is the formal practice for board directors to be ‘elected’ by shareholders, it is the traditional practice for corporate officers to recruit candidates, and solicit proxy’s to attempt to secure their ratification as a slate at the shareholders’ annual meeting.

Education management can exercise no attempt to control the recruitment and election of their school board trustees. By formal practice, trustees are self-proposed and elected by the public.
INFORMAL PRACTICES:

Stakeholder Contact Responsibility

For the most part, stakeholder interface is undertaken by TLP’s senior management. All staff members have been invited to attend the annual meeting, but only management officers officially take part in the proceedings. While staff have been invited to attend board meetings, it has only been on those occasions when they have been asked to make a specific presentation.

It was generally believed that a shareholder focus is only of real concern to senior management in business organizations. In fact, participation in shareholder meetings rarely involves anyone except officers of the company, and shareholder contact is usually undertaken only by senior executives or those specializing in public and corporate relations.

According to a number of principals, the interface between the education system and the trustees takes place at the senior management level of boards who are, “answerable to the trustees” while principals: “are not”. One principal remarked that the reason he had not sought upward mobility was because all roles above principal “are wrapped up with politics and all the other side issues”. However, recently the government has mandated that each school must establish a ‘school community council’ which forces schools to connect with their stakeholders.

Stakeholder Differentiation

TLP does not rank any particular stakeholder over another. It has been recognized by board members that TLP’s continued existence would be equally jeopardized by the withdrawal of the financial support of business as it would be if the school boards were to withdraw their endorsement.

Business engages in the informal practice of ranking stakeholders. Many business people admit that shareholder interests are pursued over the interest of any other stakeholders. In some companies, customers are differentiated by the terms ‘primary’, ‘secondary’, and ‘end user’.

Educators have not traditionally ranked stakeholders in their terminology and in their practices. Teachers, for example, are very careful to be inclusive in their language, not wanting to alienate or
omit any part of the public. However, by informal practice, school boards appear to rank government and business as their most important stakeholder groups. Individuals from boards continually referenced: “The Ministry” - and appeared to invest considerable time interpreting, dealing with, and being frustrated by this stakeholder over any other. Since, as one business person explained: “the government...one of its key stakeholders...has lost its ability to provide funds in the way it used to”, educators have been required to seek new sources for replacement funding. In the perceptions recorded in the category of ‘financial matters’, boards were noted to be informally undertaking greater responsibility for revenue generation, focusing particularly on the business sector. A significant amount of time and attention is being invested by boards in the informal practice of cultivating material support from this particular stakeholder. Every board in the Toronto GTA has created communications materials targeted specifically to reach and influence the business sector. Consequently, business appears to have assumed a higher rank positioning, and a number of educators have recently begun to reference their stakeholders as: ‘customers’.

**BELIEFS:**

**Board Member Ideologies**

It is clear that individuals who are positively disposed to the notion of business-education partnerships serve on TLP’s board of directors. For example, on TLP’s board a seat has been reserved for a representative from the teachers’ federations. Initially this seat was occupied by the President of the Ontario Teachers’ Federation. When his OTF term ended, he was engaged by a local school board to develop business-education partnerships. Clearly, by accepting this position he demonstrated a positive disposition towards business’s involvement with education. When approached to appoint a successor, OTF requested the opportunity to occupy the seat in a ‘monitoring capacity’ - i.e. to attend and observe, but not to actively participate. Charlie, then Chair, was reported to have responded: “you’re in or you’re out”. Since that time the seat has been held open for federation representation, but no one from the federation has attended board meetings. Recently, however, a number of projects have
received endorsement by some federations, and the Federation of Women Teachers has explored the possibility of official membership in TLP.

According to one corporate president, ideological homogeneity is valued as a criteria for director selection. "If you bring someone on your board in business", he said, "they have something specific to contribute and everyone agrees that that's the case".

Historically, trustees on education boards represent heterogeneous ideologies. That elections occur every few years; that trustee turnover has historically been high; and that different political parties have consecutively assume power has contributed to the self-perceived traditional propensity whereby education: "changes direction...on a regular basis".

Perception Towards Diverse Interests/Opinions

TLP has learned from its experience with some teaching unions, and some partnership development officers at boards, that outside interest groups exist which do not endorse TLP and its partnership activities. Gordon Cressy has stated that while the concerns of outside interest groups should be heard and respected and they must be kept informed about TLP activities, their views cannot be allowed to negatively impede TLP's operations, nor the morale of its participants. A few representatives from specific union locals have picketed TLP conferences. Their activities have not been impeded by TLP officials who have, in fact, invited them into the conference, and recognized from the podium the picketers' right to their opinion. Never-the-less, the conferences and TLP efforts in bringing business into education have not been curtailed. And TLP's approach to board partnership developers who have felt territorially challenged has been to listen, and attempt to work out a mutually acceptable territorial deal. However, it was confided that, in some cases, to move TLP initiatives forward, ways have had to be found to "work around" these individuals.

A number of business people echoed the opinion that: "I don't care if the outside interest groups like it or not". According to one vice president, any expression by business that reflects a belief in diverse interests, opinions or practices is instrumental and not deeply held. He offered the example of acknowledging outside ethnic and gender interests in hiring practices, which he believed businesses
adopted not because: “they respect diversity”, but because: “it attracts different kinds of people to your organization to keep the government off your back”. Alternatively, a few business people indicated that some business are moving from a ‘shareholder’ orientation to a ‘stakeholder’ orientation like that exhibited by education, in order to attend to other interested publics, such as environmental groups and government whose actions could negatively impact business activities and financial well being. It was explained that: “exclusive attention to the shareholder will disaffect other communities that, if disaffected, will not leave you in business very much longer. ...So we have, we consider four key stakeholders. Shareholders is one, employees is another one, customers is another one, and the community is the fourth. Now, you can say this - the three other than shareholder we’re only interested in, because if we don’t get those right, then we get nothing for shareholders. I mean, that’s a reasonable thing to say.....(because, for example) if I don’t pay attention to....and don’t create some value for employees, they’ll go somewhere else. If they go somewhere else, I’ve lost it. This is a service business. If I don’t have people, I get nothing for shareholders”

Educators appeared to express, in word and deed, a genuine concern for a variety of interest groups. Interest groups can be witnessed to have affected education operations, regardless of whether their concerns have been formally translated into government mandates. For example, a director of education referenced the influx of immigrants to Toronto, to which Toronto area boards responded by increasing their efforts, operations, staffing and funding of English Second Language instruction. Another spoke to the “family needs” of certain communities which motivated schools to undertake breakfast programs.

CROSS-CULTURAL JUDGMENTS:

By Business People About Education:

For business management, used to a preeminent shareholder, and individual authority, education’s multiple stakeholder structure, and shared authority is judged as, “an abundance of management but with very little discernible accountability”. Many of them asked: “who’s the boss?”
Conditioned by their norms, they expected there to be ‘one’ individual or group where responsibility should ultimately reside. Lacking cultural manifestations that support engagement with multiple stakeholders, business people found dealing with, “so many constituent requirements” to be: “frustrating”. Further, a number of corporate presidents found the heterogeneity and constant change in the ideology of governments and trustee boards to be: “wrong”, “very inefficient” and “unproductive”.

By Educators About Business

Educators judged that while a public interest may be espoused by businesses, few have developed the skills and physical organization to practice public consultation. Educators, conditioned by the formal and informal manifestations of a stakeholder culture that assumes collective responsibility and authority, judged that, unlike them, businesses: “can bloody well do what they want as long as... (they) stay in business”, and haven’t “any need to satisfy a larger public constituency”. However, one director expressed the opinion, echoed by a number of business managers, that the expectations and voices of multiple interest groups are, “coming much more through society”, are not just, “at the door of the school”, and may well arrive, if they haven’t already, “at the doors of businesses”.

V.12 TIME

**FORMAL PRACTICE:**

**Outcomes Realization Period**

Its limited resources contributes to TLP’s focus on realizing outcomes in the short term. The organization has no long term source of financing. One year donation commitments are the norm, as is the regular demand by investors for demonstration of what value their investments have accrued.

There are few paid staff. And the organization cannot count on a long term commitment by unpaid volunteers from business, and school people who elect to participate in TLP initiatives. While the short term is the focus for financial matters, on non-financial outcomes, the longer term is expected.
Business focuses on outcomes in the short term. By formal practice, reporting is quarterly for public firms, and in both public and private companies targets are measured monthly. While the short term is the expected norm, a president noted that top management and those in human resources do exercise a longer term focus: "two, three, four years, long term" in their planning for the future. It was also observed that outcomes can happen "more quickly" in small business, since it lacks the "bureaucratic complexity" of big business that tends to increase the time to get things done.

In education, it is self perceived that outcomes require lengthy amounts of time to be realized. According to numerous educators: "things don't happen quickly in education". Even business people recognized that, "the payback period is longer in education" since teachers' effectiveness: "is a much longer term question".

**Decision-Making Time**

As has been previously explained under 'Decision-Making', TLP has limited the number and hierarchical level of those dealing with policy and project selection decisions in order to shorten the time required. However, decision-time regarding project implementation has been lengthier since it involves greater attention to details. In addition, implementation decision-making involves school-based educators whose limited availability and need to share in the decision-making process serves to lengthen the time involved.

By formally "empowering" individuals with decision authority, and by adopting "straightforward" procedures, decision-making in business is structured to require as little time as possible.

The time required for decision-making in education is lengthy. Because of the formal practice of shared authority, and the informal practices of consensus building with many interest groups, suspending decisions in the absence of trustees in election time, and the propensity for "everybody to have their say": "education is slow off the mark... it takes time to...O.K. an initiative".
Formal On-the-Job Time

On-the-Job time at TLP follows business norms. TLP operates all year round, and the office is open from 9 a.m. to 5 p.m.

The number of hours set for the working day, and the number of weeks in the working year are longer in business than they are in education. According to a business manager who also acts as an education trustee: “Clearly very few of us in the working world...are home maybe at 4 o’clock in the day, or start at 9 in the morning...we don’t get the kind of vacations and other times off that are available in education”.

By formal practice of collective agreement and tradition, the school day “is from 9 to 4”, and the school year involves time off at Christmas, Spring Break, and throughout the months of July and August. This is clearly less than what is formally required in business. At a board of education, one superintendent referred to her “business day” as “8 to 5”, “often longer”, “with night meetings” and the requirement to work in the summer to wrap up and prepare for the school year. Numerous board managers echoed a superintendent’s comment that, “when you are in a school and you come into central office...this is a whole new world to you...because they are not bound...by the same work day”. According to her, that ‘work day’ reflects that in a “business operation”.

Demographic Temporal Orientation

TLP is structured to accommodate adults. The presence of young people is not a regular occurrence. Most initiatives have involved adults and consequently, an adult temporal orientation has been observed. People are expected to be able to apply lengthy cognitive attention to matters, and multiple issues may be dealt with at the same time.

Time in business is structured to accommodate the temporal orientation of an adult who has a relatively long attention span and is capable of cognitively dealing with multiple issues at one time.

Time has been structured in schools to fit the temporal orientation of children. The work is delivered in small units of time to follow a shorter attention span, and subjects are
compartimentalized to avoid cognitive dissonance. However, it was self perceived that the time structure at boards is consistent with adults' temporal orientation.

**INFORMAL PRACTICES:**

**Role and Place Turnover**

During TLP's relatively short existence, turnover among permanent employees has been relatively low. Turnover among volunteers and participants has been relatively high. On board and committee contact lists very few names remain active over time. Membership retention in TLP has been high. Over the first four years, few companies did not renew their investment. However, recently, it has been noted that the turnover rate among business members has begun to rise.

In business, employee role and place turnover was reported to be high. People tend not, by informal practice, to remain in the same role, at the same location for decades. One president reported that: “my father worked for forty-five years for the company and that day is changed, and I don’t think there is as much company loyalty.” And an educator observed that: “in business...there are very few cases of somebody who’s been working for thirty years in exactly the same location”.

In education, the rate of role and place turnover was noted to differ among those who taught and those in administration. A researcher from a board stated that: “very often (teaching staff) will be teaching for 20 or 30 years in the same physical location”. And it was observed that many teachers elect to maintain their teaching role rather than to seek promotion. However, it was noted that people in administration - those at boards and particularly principals and vice principals: “are moved regularly”.

**Sense of Urgency in Language and Behaviors**

At TLP, once a project has been approved, a sense of urgency can be observed among the staff and volunteers involved. Facing duties and deadlines, project groups tend to meet more frequently, and language tends to speed up. Among TLP management, recently pressed for more project outcomes, particularly by business members, there is a sense of urgency around increasing the number of projects implemented.
In language and behavior, business people exhibited a sense of urgency. The language tended to be short, telegraphic and action-oriented. One line manager reported that business people say: “this is the problem, three plans - bang, bang, bang. This is what we’re going to do. Okay, let’s go out and execute. It’s done, check it off. On to the next thing.”. Business people often interrupted lengthy descriptions and requested, or demanded that the individual “quickly” come to the point. Business people stated that they “respond” to requests and “return phone calls immediately”.

Educators noted that, in their environment: “there isn’t that sense of urgency”, that they observed among business people, which they attributed to the need to, “pay the bills” and, “be directly accountable”. Educators generally were not observed to employ language that signaled a sense of urgency. Compared to business people, educators’ language tended to be less demanding and directive, and they demonstrated a tolerance for listening to detail and opinion. It was self and cross perceived that that educators’ decisions either: “take a great deal of time” or, “they just don’t make them”. Numerous business people stated that educators, even at boards, often did not return phone calls in a “reasonable” amount of time or, “don’t return the calls at all”.

Concern for Time Management at Meetings

At TLP meetings, the negotiation of time parameters up-front often occurred, and meetings tended to begin and end at the time specified. In addition, TLP staff were noted to express a concern for time management, by verbally encouraging closure on issues, or by indicating that an issue should be discussed at length at another time.

In language and informal practices business people demonstrated a concern for time management. A line manager reported that those in business say, or at least, think: “OK what are our objectives from the time we’re spending around the table. What do we hope to have done from this hour that we’re sitting around”. Business people requested that up-front negotiation of time parameters at TLP meetings be adopted. Business people were also observed to employ, and rely on personal appointment record systems. According to educators: “with business the meetings start quite predictably at the time they’re
supposed to start, and they usually end quite predictably at the time they are supposed to be ending”, and that business people: “had to adjust”, to the protracted use of time exercised in education.

Most educators were self and cross perceived to demonstrate little concern for time management. People from education characterized their own meetings as: "a little more slack in starting". "quite often teachers would be late", "wouldn’t follow an agenda", “there’s still the sense that you speak on a topic for quite a long time until everybody has had their say...regardless of the time it takes". Up front negotiation of time parameters was not observed to occur at education meetings. However, senior people from boards demonstrated the use of personal time management systems and verbal and non-verbal behaviors which signaled a concern for time management.

Investment of Personal Time On-the-Job

For TLP staff and volunteers, investment of personal time on projects has occurred, and this appears to be expected. For example, TLP conferences have been held on week-ends, and job assignments have been allocated anticipating that staff and volunteers would attend and carry out their duties without additional/any remuneration.

It was self and cross perceived that investment of personal time on-the-job in business is expected.

In business: “the notion of doing more than your job is kind of the by-word now for everything that we do”, and management: “rewards” and, “recognizes...people who ‘quote’ do more than their job”.

In education, employee investment of personal time on-the-job may not be expected. Time spent in out-of-classroom activities may not be considered in performance criteria by union regulation.

Preparation time has been negotiated into the duration of the working day. No financial rewards are granted for participation in ‘after-hours’ activities. For teachers: “once the classroom doors are closed, it is up to them in terms of how much time they want to give over and above that”. It was reported that teachers: “have more of a sense that the working day doesn’t necessarily extend well into the evening”, and they: “do not understand that particular culture where your personal time is not your personal time”.

A TLP participant stated that she had moved from business to education, wanting “something 9 to 5...a sort of more defined day schedule...more predictable in terms of my time”. However, it was mentioned
that at boards personal time investment is expected. Board officials stated that attendance at evening meetings, and the execution of some duties in the summer is expected of them. And it was noted that for those teachers seeking promotion into management positions, investment of personal time in after school committees and activities is expected, and considered in promotion decisions.

**BELIEFS:**

**Rationale for Time Orientation**

At TLP it is believed that ‘determining what to do’ and ‘doing it in education’ require different time lines. Short time lines are needed to satisfy business members’ need to be decisive, and longer time lines are needed to satisfy education members’ need for deliberation.

In business, the need to be decisive fosters short time lines. It is the informal practice to react quickly, given that, “the impact of not responding to market needs very quickly is very short”. Business people expressed the belief that “product life cycles are getting shorter” and “the payback period is short”. As a result, as one CEO remarked: “you’re much more tuned to this ‘what did you do for me today’, ‘how much did you sell today attitude’”.

In education, the need for deliberation precipitates long time lines. On policy matters, it was suggested that the more time that was invested, the greater would be the likelihood that the “right” decision would be achieved. “Quick decisions” according to a director, “make teachers suspicious”.

**Criteria for ‘Working Hard’**

Employees and volunteers at TLP rarely referenced how ‘hard’ they worked. However, they often expressed frustration that those not involved had no appreciation of the extent of time and resources required for TLP initiatives to be mounted. This was particularly directed at those who signed cheques, but invested no effort in TLP initiatives.

Business people spoke about how ‘hard’ they and others in their profession worked in terms of the amount of time they invested in their job. Apparently, for business people, working “hard” meant
working “long hours and weekends”. Not taking holidays, or adjusting the holiday schedule to fit work needs were esteemed as an indication of career commitment.

Educators spoke about how ‘hard’ they and others in their profession worked in terms of the emotional drain they experienced from their jobs. For them, time spent was not perceived as a measure of how ‘hard’ people worked, nor how committed they were to their jobs.

CROSS-CULTURAL JUDGMENTS:

Business people about Education

Numerous business people spoke to the considerable frustration they felt in meetings with educators which did not follow business’s time norms. Education’s formal on-the-job time, and their discretionary personal time investment proved to be a real source of resentment among most business people, some of whom stated that the formal hours of school operation did not represent a model for what they deemed to be: “real life”. Viewing the amount of, “time of educators have”, provoked the observation by one business person of his fellows, that: “they don’t tend to feel the people in education work very hard”. One president who was working on a summer initiative at TLP was faced with the comment by board people that: “you can’t expect teachers to stay longer than 3:30”. He expressed no reaction at the time, but later confided: “I think it colors the judgment on a lot of things, because your conclusion is: you’re lazy bastards”.

Educators about Business

A trustee and former business woman judged that: “in business, your working day is your life”. And many educators pointed to business people’s impatience, their short term time expectations, and their propensity to favor time investment in: “getting the job done” over time spent in: “dealing with relationship issues”. One educator explained and advised that: “In a classroom...one lives time in a very slow pace. It’s the time of human relations. It’s the home time. It’s the domestic time. You really have to connect with the kids, and talk to each other, like we do in the private life, much more than in the
business world. Just that element is an element where we need lots of investment of thinking of how to work together (in partnership) and not think that in one meeting, one evening we'll find a solution to a problem”.

V.13 TRANSFORMATION & CHANGE

FORMAL PRACTICES:

Structure for Change

TLP is a small, relatively flat organization that is too new for structural entrenchment to have taken place. Consequently, the organization’s structure is flexible and can therefore accommodate change relatively easily. The decision, for example, to move from a four-committee to one-committee structure was executed very quickly.

Business people, particularly those from big business, often referenced examples of how their companies had or were attempting to re-design their structures to be more flexible for change. Numerous executives pointed to: “the ability for big bureaucracies to turn-around”. A staff manager observed, for example,: “I know that certainly the critics of the banks would describe us as ‘lumbering beasts’, you know. In fact, you’ve gotta be a pretty nimble organization to go through the kind of dramatic changes that we have undergone within the last decade”. Even educators noticed that most big businesses: “got rid of all those middle management positions” in order to remove bureaucratic levels.

The structure of education was self and cross perceived to be inflexible with respect to change. It is a big, tall organization with an entrenched structure and formal practices that mitigate against radical or fast change. Words used, even by educators themselves to describe their organizational environment, including: “very large”, “multi-leveled”, “bureaucratic”, “highly regulated”, “both capital and small ‘p’ political”, “needing consensus for decisions”.......all portray a structure where change is not managed easily or rapidly.
Locus of Authority Effect Structural Transformation

TLP stewards and management can transform the organization if they so choose.

Business management and boards can transform the organization if they so choose.

Within its existing organizational boundaries, education can only be structurally transformed through legislative acts by government.

INFORMAL PRACTICES:

Locus of Recent Organizational Change

TLP is itself a manifestation of change in structure and processes in the interorganizational relations between education and business. Prior to its inception, there was no formal systemic partnership between education and business in Toronto.

Business people observed that throughout the ’80’s and ’90’s their sector has experienced significant change in both structures and processes in response to economic downturn, technological revolution and increased competition. In particular, “big businesses” were noted to have: re-engineered structure and operations - reducing the number of hierarchical levels and technologically re-tooling. A line manager commented that: “we get fed by the changes and exchanges...our industries break down and change, and the way we work changes”.

Teachers observed that, in schools, much about the process of teaching has, in fact, changed. They referenced the change in student demographics from homogeneous to heterogeneous ethnicities. They spoke about the change in the principal language of students from English to a multitude of alternatives. They particularly stressed the expansion in the amount of social responsibility that the schools have been required to shoulder - that teachers were, in many cases, feeling obliged to become: “surrogate parents and not just teachers to disadvantaged kids”. And “Years ago”, according to a department head:
We didn't have time (to get involved in partnerships). When I started to teach you didn't even sit down, you had to stand up the whole time. You couldn't wear what you wanted. All those awful, awful rules that have nothing to do with anything...You had to plan what you were doing for the month. And every Friday you had to hand in what you were doing in detail for the next week. When someone came into the class and it was 10:10 you better be doing multiplication tables or you were dead meat...You were 'inspected' you weren't 'evaluated'. You did exactly what the principal said, and the principal did what the board said, and that is changed now, at least in a successful school. Now the principal says: 'I have a concern here, or a teacher says 'I have a concern, what is the solution' or a kid says 'I have a concern, or I have a need'.

Board personnel also referenced a number of recent changes in their processes and structures. A department head noted that some changes in informal practices exhibited by boards represented an adoption of "business tactics". She stated that there are committees at boards: "that say: 'O.K. we need to get, we need to do this task, we need five meetings to do that. Who wants to get on that sub-committee?' Those are business tactics, and a lot of people in education are using them now, but not a lot of them used to". And a board coordinator stated: "We're starting to, within the education culture, if you will, adapt a lot of business kind of approaches. TQM, for instance, and a variety of standardization and a variety of these kinds of operational features that have worked in business...So it's a very interesting time to be looking at these two cultural entities, that are kind of bumping up against each other". Profound budget cuts have precipitated downsizing in the number of personnel. According to one board official, title changes, like: "the title ‘program coordinator’ has changed at some boards to ‘curriculum coordinator’...implies that it’s much more broad, so there’s so much to do now...but not as many people as there used to be". It is interesting to note that the greatest amount of structural change boards have made, (for example, setting up armslength entities charged to manage non-public revenues or offices to manage "special services") have been done, in fact, outside the traditional organizational boundary of education.

Rate of Change

TLP has demonstrated that it can execute change quickly.

Business people demonstrated an expectation that change could and should be made quickly.

Educators recognized business people's "ability to change fast". An educator marveled, for
example, at the speed with which manufacturers could develop and distribute new products or updated versions of products.

In contrast, education was both self and cross perceived to change very slowly. The department head who marveled at business’s ability to change fast commented, in comparison, that schools do not respond to consumer demand the way businesses do. “Schools do not greet who comes through the door and make their timetable fit that”, she explained, “they say: ‘has that Latin guy retired yet? No? Then we’ll teach Latin’”.

Perception of the Change Process

TLP employees and volunteers have learned through their efforts that effecting change is not easy. And after more than two years of effort, TLP management still had difficulty answering the question: “what systemic change has TLP precipitated in education?”. None-the-less, underlying TLP’s work is the assumption that change can be facilitated through inter-organizational relationships. While TLP’s projects are directly targeted to achieve systemic change in the education system, it is interesting to note that perhaps the most significant change TLP has effected has been among business people who, through direct and often prolonged contact with educators, have reported a change in their understanding and perceptions about the education system and educators. The steering committees’ long deliberations about how MTLP would be organized exposed business leaders to what leading a school board involved, and a level of respect for education directors was born that previously did not exist. Steering committee members stated that they found they were: “spreading the word” amongst their colleagues that education was much more complex, and senior educators were more capable than they had anticipated. And it was interesting that Gordon Cressy circulated the true story that one business executive, exposed to TLP, made the decision to forego his company’s Christmas party to attend his son’s birthday party, an action that many executives would traditionally characterize as a ‘career limiting move’.

Business people represented the belief that, while change is difficult, certain circumstances necessitate and facilitate it. Those certain circumstances involve a termination crisis - either corporate, or individual. According to an executive: “it’s very hard to change people or implement
anything new without a crisis... (like) going out of business”. And a president remarked that: “with competition and the recession... many more people at every level recognize that the status quo just can’t continue to exist or we’re all going to be out of jobs”.

Educators appeared to believe that change is difficult in their sector. Educators themselves remarked that it is difficult, “if not impossible” to make change happen down through the physically discontinuous levels from the Ministry, through the school boards, into the schools and down to the classrooms. Educators eschewed the notion that change requires the motivation of a “crisis”. During a TLP meeting educators reacted with vehement disgust to a report that the then Education Minister, who had entered politics from the business sector with no professional experience in education, had allegedly stated that, in order to effect change in education, a “crisis” had to be “manufactured”.

In addition to change being perceived as a difficult process, it has also been perceived as a pointless exercise. Teachers with long experience were noted to perceive that government officials: “don’t know what they’re doing... it’s just a political football”, so their reaction is: “I’m just going to do what I think is right”. It was observed that so many different, and often contradictory policies and practices have been mandated by changing governments over relatively short periods of time, with little support and encouragement, that many teachers found there was little point in attempting to: “follow the swinging pendulum”.

Attitude to Change

TLP staff realize that if they cannot demonstrate that the organization can effect change it will lose financial support.

Business people represented the notion that, today, there is a high risk for not changing in their sector. A senior officer of a major electronics manufacturer referenced his industry’s move from a ‘don’t change’ to a ‘must change’ philosophy with the comment: “we used to say the big eat the small. We now say the fast eat the slow”. Business people directly and indirectly expressed the belief that if they didn’t change, they, as individuals would be “out of a job” and/or the organization, itself, would “go out of business”.
In education, no one referenced any downside to individuals or the organization for being change-averse. In fact, individuals who represented moderate practices and beliefs relative to change appeared to be more highly regarded than those who spoke about and attempted to motivate it. There appeared to be a concern that education: "should not bow to the winds of change".

CROSS-CULTURAL JUDGMENTS:

By Business About Education

Business people generally judged education and educators to be change-averse. An executive remarked: "If you look at it, a classroom is one of the few working environments ... which physically hasn't changed in over a hundred years ... the computer is not necessarily going to change it because certainly television hasn't changed it". Business people judged that education's structure has not kept pace with changes in the community. According to a line manager:

In the 80's ... the whole dynamics have changed in terms of how society lives ... it ain't 'Leave it to Beaver' anymore. So that's changed the whole society. Community dynamics have changed. But schools have not changed ... basically, the education learning dynamics have not changed. School boards haven't changed. The composition that goes around them - educational trustees, all these processes ... structures and organization have not changed ... but everything else has changed, and yet on the outside, everything has stayed the same, it hasn't kept pace.

According to a small business president, the teacher's role reflected: "the old eighteenth century model" in spite of changes in society's needs, which is why "they don't like their jobs right now". She explained that: "It's unfair to take any one individual in this day and age...and say: 'for the next twenty five years you'll have to do your job exactly the same way that teachers did it one hundred years ago".

Business people offered six judgments to explain why education remained change-averse:

(i) Educators perceive that they lack the empowerment to change, as in:

(There's) an acceptance of mediocrity. An acceptance of: 'gee there's a lot of things that are terrible at this place, but hell, we can't change anything'.

(ii) Education lacks the stimulus of 'going out of business' that precipitates change acceptance, as in:
When you’re going to lose money if you don’t change, if you’re going out of business...this very quickly gets everybody moving that way...in education you don’t have that same incentive that forces all your behavior ...as a result, people don’t see a need to change.

(iii) Educators’ practice of ‘across-the-board’ allocation of resources frustrates change, because any change appears to be tremendously expensive to implement.

(iv) Educators: “don’t know how to change”;

(v) The education system “has no mechanism for developing sustainable change”, as in:

How can you keep a project going when the principal is yanked out and there is no mechanism for bringing the new guy up to speed?

(vi) The political nature of the education system that prohibits the development of a single ‘vision’ that is required for structural transformation in education, as in:

When you cut a little, a little, a little at a time, what happens is ... all you get is, I call the ‘high heel effect’. All the pressure ends up being put on the teacher and the student. But nothing systematically has really changed, everybody is just dealing with a little bit less. It does not transform the ... organization, and you have to have people who have tremendous vision. Where does the vision come from? That’s the problem of course, in the public sector is the politicians - the shifts from the left to the right to the middle to whatever. But even if they were all politically in the same wave length, somebody’s got a different view of the world. And then you have things that end up being run by task forces, and commission and all this other stuff. But at the end of the day, someone’s got to have a vision to drive this. Who’s populating the school boards? Once you’re in a school board, how do you change?

or:

If you look at educational reform analysis in a variety of jurisdictions, there is one fundamental reason whether they succeed or not, and it is all wrapped up in: ‘can you, can the reformers, even being modified for a period of time, outlast the people in the system?’...Because the feedback always is: ‘this will come, and this will go’;

A number of business people predicted negative consequences to education systems which do not change. For example, the remark was made that: “if school systems, for whatever reason are incapable of change...what will occur is a new system will come in and replace you”.

By Educators About Business

Numerous educators judged that much of the criticism about the role of education made by business people is not based on current, direct understanding. It was stated that people, “hold an image of a school...that was true fifteen or twenty years ago”, and, “the place has changed” but “they don’t know because they haven’t been there”. This perception, that business does not understand the amount of
change educators have been grappling with, has become evident to some educators through their experience with business people at TLP meetings. They report that business people at TLP meetings say:

‘Just tell them to do it and have them implement it’. They don’t understand that at the same time we are saying ‘do this’... all these different things are coming out from the Ministry and all sorts of different things they are being told to implement into an already very crowded curriculum and to a classroom of students that come with all different learning abilities and all different challenges and behavioral problems. And (teachers) are trying to balance all that, so one more thing, like a (partnership) program - you think it’s great. But they may not quite perceive it that way.

All educators interviewed, indirectly or directly judged that business people who took the time to really involve themselves in the education system, would gain a genuine appreciation of the challenges this sector faces. According to a board partnership director:

I don’t think business really, truly do understand the extent of the challenge that teachers are facing. They don’t really, truly understand how difficult it is...there is a woman who works with (company X). She was involved fairly intimately in (partnership activities) for two or three years and she spent a day in a school shadowing a teacher....I talked to her after, and she said: ‘Nothing prepared me for that. I’d been involved in partnerships for two years, but nothing prepared me to truly understand what teachers face until I did that!’ And I’ve heard...that the best experience teachers have...is...working in companies in the summer on a two year project...And that says to me that there is a real, true difference in these two cultures, and that it takes something like that to truly understand the differences.

It was judged that: “in general, when (business people) come and sit around the table for the first time, a lot of them are influenced by the media perception of public education and they don’t understand a lot of the underlying factors that education is dealing with, nor do they understand the way education really works”. According to a Board official “the media is just totally negative...everything is negative...everything is blown out of proportion...a negative spin is put on almost everything that happens”.

One educator challenged business peoples’ assertion about how much their companies have really changed. She stated that at a big business with which she was familiar:

... said they had changed from being hierarchical in organizational structure, or were in the process of changing, to a much more organic kind of organization that has less to do with hierarchy and more to do with teams and that kind of thing. So my expectation in coming here (on exchange from education) was that I would find an organization that was quite fluid and that kind of thing. Some of that is true. But old hierarchies die hard and there is still quite a hierarchical frame within which the people in (Company X) work.

A Department Head suggested that changes in society are precipitating changes in both business and education:
We're different now. We're different at home now. Everyone’s different. Children are different. People who have trouble with their children are the ones who don't recognize that their children have something worthwhile to say...And see, when something isn’t working for someone...now in business and in teaching you sit down, and at home with your children you say, ‘O.K. this isn’t working. What are some solutions?’ But in any of those places, it didn’t used to be like that.....You didn’t have to think on your feet before. It was all in the manual. Now the things that are in the manual are policies and procedures and safety issues.

V.14 VERBAL & NON-VERBAL COMMUNICATION

FORMAL PRACTICES:

Workplace Name

TLP people referred to their organizational entity as “TLP” or “The Partnership”. The TLP workplace was referred to as: “The (or Our) office”.

Business people associated with TLP referred to their business organization as “The” company’, and their place of work as “The office”.

Educators primarily referenced “My school”, and “My class” (note the personalization). People from boards referenced “The board”, and their workplace as “The Office”.

Workplace Physical Structure

TLP is a business office environment, located on a segment of one floor in an office building.

The physical structure of the workspaces of business people who hold administrative positions is distinctive. And although there are many different physical types of business workspaces, TLP participants from business primarily operated out of administrative, or “office” environments with adult-sized furniture, fixtures, and facilities. Work places tended to be individually conformed. Business offices appeared, for the most part, understated in their color, minimal in their adult-oriented decoration, pervasively technologically equipped, and climate controlled.

The function of educating is performed in a physical “school” environment whose furniture, fixtures, and facilities are primarily designed for children. Schools, elementary in particular,
tended to be constructed with few stories, with workplaces or "classrooms" designed to conform to a group. Most schools appeared brightly decorated and often display children's work. Rarely was a school air conditioned. However, the administrative management of a school could be easily located by finding what is called: "the office" which, in appearance and structure is more consistent with a business environment than it is to the rest of the plant.

All of the school boards in Toronto, apart from the odd display of children's work and 'government-like' trustee meeting rooms, were indistinguishable from the description of a business office given above.

**Presence of Technology**

- TLP staff appeared to all have access to technology, including telephones and computers.

- Telephones and computers appeared to be pervasive in business.

- Schools did not appear to be pervasively equipped with technology. There were few telephones, and computers were often located in the library for adults and children to share. At boards, technological availability and access was more noticeable.

**Access To Information**

- TLP staff all appear to have access to information about the organization and what is going on. It is a very small staff and doors to offices are rarely closed. TLP management attempt to inform staff about upcoming events and issues. Regular staff meetings help to inform everyone about the many and varied on-going and up-coming projects and events.

- Managers and professionals in business indicated that they had direct access to information, particularly through technology. An educator on exchange in a business stated:

>This thing here (gesturing to a computer) connects me worldwide. And we get communiqués from all over the place...At least one a day coming through the organization saying: 'so-and-so has retired... 'we're doing a re-organization'... 'we've got a new idea'...So this stuff comes through on a regular basis, through the electronic system. Along with the information on how to get more information".
An executive from a school board, with experience in business, stated that, in business, policy makers attempt to give employees advanced communication about potential events, policies and issues that may arise or are forthcoming. She noted that business people don't have to find out what's going on from "the press release". In addition, it was self reported that business people have the opportunity to "travel to conferences" and "join industry associations" in order to access and share new information.

According to educators: "Teachers are focused on a very narrow perspective...the focus of their life is their students...But...there just are not the opportunities to keep abreast of everything that's going on. Now you have to rely on the principals and vice principals to do that - to keep that communication line going with those who aren't 'out and about' and finding out about all these things". Teachers' lack of direct access to information was cited to exist, not only because of their classroom isolation, but because of their lack of access to technology, and their inability to travel to conferences where new information is shared.

People from school boards noted that their roles allowed them to establish informal communication networks with people from other boards and: "we tend to sort of talk to each other a fair bit, here and there and know each other in different associations...as a result of that, when different people would be doing similar sort of things, you would tend to sort of talk to each other". In addition, they were observed to attend education industry conferences. However, board people admitted that about government matters, they: "never knew what was going on"..."until the Minister announces it publicly". And "the decision would come out and bingo! it had to be implemented".

Role Rank Visibility

Role rank for TLP’s president and vice president is visible in the size of their offices. In comparison to the rest of the staff who operate in open areas, top management offices have doors which afford privacy. Windows are not allocated to top management, but to staff. Gordon Cressy's office, while large and private, has no windows, located as it is in the middle of the office, adjacent to the reception area.

Role rank or position in business can often be determined by the size of the office, its elevation level, and its access to windows. Larger, private offices, on higher floors, with larger window
expanses often signal a high ranking occupier.

At schools, teacher ranking is not visibly apparent in their surroundings. Workspaces for teachers are physically similar, and one cannot identify, from these surroundings, who are the highest paid teachers. Like their counterparts in business, however, directors at boards often command the highest, biggest, and most private spaces, with the largest window areas.

**INFORMAL PRACTICES:**

Dress

At TLP business attire appears to be adopted. It is interesting, though, that school people who attend TLP meetings appeared to "dress up" for the meetings, by wearing suits. And that many senior business people would arrive for a meeting, remove their suit jackets and roll up their sleeves thus making themselves less formal. Each of these actions could be interpreted as a 'signal' of stepping 'up' or 'down' in role.

Business people operating out of offices tended to dress formally, and in dark colors. Although other attire is visible in business operations, at TLP meetings business people adopted office attire.

Compared to business people, educators at schools tended to dress less formally, and in brighter colors and softer fabrics. One executive (in banker's blue pinstripe, crisp white shirt, and black oxfords) characterized the difference he noticed between business people and educators with the terse quip: "sweaters and brown shoes". An educator observed that professional attire is much brighter and less formal today than twenty years ago, when principals and male teachers were expected to wear suits, and women teachers: “had to wear the skirt, peter pan blouse and string of pearls”. According to a female superintendent, physically, and in informal practices: “central office (a.k.a. ‘the board’) is a ...business operation”...”we wear suits”.

**Jargon For Administrative Headquarters**

In many large corporations, the administrative headquarters was reported to be referred to as: “the
ivory tower”.

A school board research officer queried: “you know what they call this place don’t you? Either ‘the ivory tower’ or ‘the black tower’.” He asked researchers at other boards what they called their education center and the response was: “the ivory tower”.

Nature of Speech Patterns, Language, Jargon

TLP staff were observed to employ both business and education terminology, acronyms and jargon, for the most part, conforming to listener norms.

Business people were self and cross perceived to employ terms, acronyms and jargon that were associated with, and particular to, the business sector.

Educators were observed and cross perceived to employ “pedagogical” terms and jargon. At school boards, business terms have also been noted to be used.

Language Orientation

At TLP language appears to be both ‘fact’ and ‘people’ oriented.

Business language appears to have an ‘fact’ orientation. According to a line manager “business has always been driven by (words like) ‘bottom lines’, ‘profit’, and a sense of ‘let’s look at our statements’. Word analysis of TLP meetings reveals that business people had, over the long observation period, a higher number of comments relating to facts than to people.

Educators language, has a ‘people’ orientation. Business people remarked: “education has had a softer language, more ‘caring’, ‘sharing’, ‘co-operation’...they’ve got different languages”.

Another person from business noted that: “clearly, with the educators, the language is much more collaborative and much more, ‘let’s make sure everybody’s included’ and everybody...cares about others”.

While people at boards did demonstrate a ‘people’ orientation in their language, they also were observed to use ‘fact’ directed, business-like language when they referred to operational issues.
Approach to Speaking

TLP management and staff appear to think, then speak, and not to: ‘think out loud’.

Business people were observed and cross perceived to be “more reserved”, thinking to themselves before speaking at meetings.

A department head observed that, “Teachers never turn down a question...they never say ‘I don’t know’ or ‘let me think about it’...They always just start filling the air”. Teachers were noted to “think out loud”. “They leap into conversations”.

Degree of Explanation in Speech

In conversation, TLP management and staff tend to explain, and not to assume that people will know. And for the most part, because there are time gaps between meetings, and a great deal is acted upon between meetings, people generally need to have their minds refreshed, even if they do know.

In transcriptions and records of conversations between and about each of the sectors, the amount of explanation offered by business people proved to be significantly shorter than that offered by educators. At TLP meetings, business people appeared to speak, offering little explanation or clarification as they went - assuming that listeners would either understand or seek clarification.

Educators, perhaps because of their extensive work with children, most often gave full explanations, appearing to assume that listeners would not know. Educators often used the phrase: “you must understand that...”, followed by an explanation of “why”.

Tolerance for Confrontation

TLP staff attempt to avoid confrontation by using non-confrontational language, by attempting to identify and quietly ‘head off’ potential problems. Lori Cranson has had to have quiet chats with volunteers to explain or to soothe the ruffled feathers. At an early stage in the organization’s development, Gordon Cressy reported that he had to take a senior business person aside. At a meeting this person had responded to a comment about MTLP moving ahead with initiatives with the phrase: “we’ve just got to
get the sucker and drive her. Right?” Gordon had noticed the looks that had been exchanged, following this comment, between the female directors at the table. According to Cressy: “So...after the meeting (in private) I said: ‘you can’t say that anymore’. He said: ‘I don’t understand’. So I went through it and he said: ‘you’re right, got it!’ . But then he says: ‘I can say it with you, Okay?’ . So I said...that’s unacceptable for me, too. And here’s why...”.

Business people did not appear to be reticent to confront other business people or educators on issues. Business people ‘pushed’ for clarifications and justifications during TLP meetings.

It was self perceived that: “teachers are not fighters. Teachers are more passive and they find it uncomfortable when they see their union out there in a confrontational aspect, and they don’t like confrontation. They avoid confrontation...They write on report cards: ‘Johnny appears not to be motivated’ and avoid the truth, that really Johnny is lazy, because they don’t want to confront the parents.”. However, “the union leadership tends to be very obstreperous and they tend to take on all comers type of thing”. During TLP steering committee meetings in 1991/2 while educators and business people were getting to know each other, it was apparent that the senior educators did not shirk from confrontation. It was observed by a steering committee member that when business people would: “take on” one of the directors, they would, “discover that director X was no slouch...director X was very strong”. There were “friendly, but heated arguments...well, debates, and the directors asserted themselves, strongly”.

**Patience Level in Communication Reception**

TLP staff demonstrated patience in their noticeable silence when listening to volunteers without interrupting them, and in their relaxed body language when listening.

Business people demonstrated, through physical fidgeting or direct interrupting, less patience.

Educators were self and cross perceived to be comfortable with “letting everybody have their say”.

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Communication Response Rate

Messages and requests from senior business and education members of TLP tend to be handled as quickly as possible, and calls and requests by others appear to hold a lower priority. For its level of activity, TLP is understaffed, and immediate response to all incoming calls and requests cannot appear to be managed.

Business people noted that they were quick to respond to communication. A staff manager stated:

“T’m the type of person, you call me, you send me a message. I reply. I am very customer oriented and customer-focused”.

A number of educators working on TLP committees were noted to be either slow in responding to external queries, or did not respond at all. This frustrated numerous business people and provoked a trustee (who also works full time in business) to remark:

In business, the normal routine is, unless something horrendous happens you’d phone the person back, an outside customer, in fact your first opportunity and try and resolve whatever was going on and get it out of the way and carry on with the relationship...Give you an example...I had someone phone me (in my role as a trustee) last night...madder than a wet hen, and one of the reasons that they were excited was the superintendent had been phoned last Friday and still had not returned the call (by the following Thursday)...I think they deserve a response back. Almost as fast as you can. And yet, it’s not happening in several instances (in education).

BELIEFS:

Primary Qualities Valued in Communications

TLP written communications for educators and business people are different. The qualities demonstrated in communications with business people include brevity and contents usefulness. Those to educators appear to involve more explanation.

In business communications, particularly written communications, the qualities valued appeared to be brevity and usefulness. Information that was succinctly stated, and contents that could be acted upon often received praise at meetings from business people.

Educators demonstrated positive acceptance of communications in their body language (like nodding), particularly after communication that was thorough and promoted understanding.
About Organizational Language

Clearly, TLP management and staff believe that each sector has specific language that must be learned. Staff can be observed to change words and jargon depending on the sector addressed. For example, to use ‘training’ with business people, and ‘in-service’ with educators.

A line manager in business reflected a body of similar opinion that: “every industry and group of people has their sort of code....they talk differently”. A senior vice president stated that: “if you join (this company), the language varies by division and by business, and by country and so on...we have a bizillion acronyms...you have to learn the language of whatever culture you’ve been dropped into...it may be the language of the finance organization, or the human resources organization, or whatever”.

When speaking about the difference in terminology between education and business, most educators appended their remarks as did a principal who said: “but everybody has their own little jargon that they deal with”.

CROSS-CULTURAL JUDGMENTS:

By Business People About Education & Business

A staff manager made the comparison that in education, as it is in big business, projects “get fired up and supported...at the director level or at the higher end of the executive or management level, but didn’t get communicated downstream.”.

By Educators About Business

Business was judged to be much slower than educators in recognizing a value in language diversity. A former trustee stated: “Schools arrived earlier (than business) on gender issues and equity issues. They had to deal with them with their students”. “Business hated this idea of languages other than French or English”...”So its like business is now driving ‘you better learn Cantonese, you better learn Mandarin, you better learn Japanese’”... “But” schools valued, and offered non-traditional languages “twenty years” ago.
CHAPTER VI: Conceptions of Culture

... that interpret and explain this interorganizational network

VI:0 INTRODUCTION

This chapter describes six distinct conceptions of culture that are reflected by the particular information (Chapter IV) and the categorical data (Chapter V) collected about The Learning Partnership of Greater Toronto. As stated in Chapter III which described the methodological approach employed in this examination, the information and data proved to be too much, too rich and too diverse to cognitively digest as a whole. Therefore, the cultural material was repeatedly reviewed. With each review, different constellations of cultural characteristics were illuminated, and unpacked into nine (9) tables. These tables may be found in the Appendix, where a: ‘Guide to Tables’ is provided to assist the reader in understanding the format of the tables.

In the first pass at the data / information, I focused on cultural characteristics that informants found to be pervasive and consistent throughout a naturally bounded entity, and collected them into three tables:

- Table #1 consolidates, classifies and compares the characteristics attributed to the ‘hub’ of this interorganizational network - TLP itself;

- Table #2 juxtaposes, classifies and compares the formal practices, informal practices and beliefs that are perceived to pervade the two sectors that form the ‘spokes’ of this interorganizational network - Business and Education, and;

- In Table #3, the cross-cultural judgments by and of Business and Education are juxtaposed, classified and compared.

Out of Tables #1, #2 and #3, three distinct and different constellations of pervasive and consistent characteristics were identified: TLP, Business and Education. Each of these constellations reflects: ‘Organizational Culture’. This is a holistic conception of culture, consistent with Martin and Meyerson’s “Integration Perspective”, which is characterized by organization-wide consensus, consistency among cultural manifestations and the exclusion of ambiguity.
The second pass at the data/information dealt sequentially with each of the three ‘organizational cultures’ that had been established above. This time the focus was on those characteristics that informants found to be different from those exhibited by the culture as a whole. The objective was to identify the presence of constellations of related characteristics exhibited by particular groups within the cultures.

Tables reflecting these constellations, include:

- Table #4 which juxtaposes, classifies and compares those TLP characteristics that reflect only ‘business-like’ behaviors/beliefs and those which reflect only ‘education-like’ behaviors/beliefs;

- Table #5 which juxtaposes, classifies and compares the characteristics attributed to Education with exceptions in education where different characteristics may be witnessed, and;

- Table #6 which juxtaposes, classifies and compares the characteristics attributed to Business with exceptions in business where different characteristics may be witnessed.

Tables #4, 5 and 6 reflect the notion of: ‘Organizational Sub-Culture’, echoing Martin and Meyerson’s “Differentiation Perspective”. Here consensus and manifestation consistency are not perceived to pervade the culture but are recognized within its segments. And while ambiguity is recognized to exist between sub-cultures, it is essentially ignored.

In the third pass at the data/information, I sought to identify any constellation(s) of cultural characteristics that were manifested in both Education and Business cultures. Two tables resulted:

- Table #7 juxtaposes, classifies and compares the characteristics which are similar between Education and Business, since the notion of similarities between the sectors appeared repeatedly in interview transcripts, and;

- Table #8 juxtaposes, classifies and compares selected characteristics from both Business and Education which reflect ‘change’, a theme that was repeatedly mentioned by a wide range of informants.

Table #7 reveals a constellation of cultural characteristics which does not appear to have been distinguished by Martin and Meyerson whose work focused on culture ‘in’, and not ‘across’ organizations. Revealed through this interorganizational context is a specific set of characteristics exhibited by a group resident in both Business and Education - management. I refer to this type of cultural configuration as: ‘Trans-organizational Sub-culture’.
Table #8 provides a glimpse into a phenomenon that Martin and Meyerson treated as a contributing influence within their 'Differentiation' and 'Fragmentation' perspectives. In this examination however, 'Societal Culture' was found to warrant identification and discussion as an unique cultural conception unto itself.

A fourth pass at the data / information was conducted to identify characteristics that demonstrated little clarity, consistency or consensus because they appeared to be subject to a multiplicity of interpretations. This approach reflects the notion of: 'Ambiguity' - a central issue in Martin & Meyerson’s 'Fragmentation Perspective'. This analysis was performed using the particular case study information (CHAPTER IV) and Table #9 (APPENDIX), which amalgamates all of the data from the previous eight tables.

After all the data had been conceptually accounted for, the five conceptions established thus far were reviewed (together with historical information on ‘Partnerships’ from CHAPTER II), and were found to themselves reflect a cultural perspective I call a: 'Cultural Mosaic'. Martin and Meyerson make no reference to this type of multi-dimensional, dynamic construct in their ‘Three Perspective Framework’.

Descriptions which highlight the distinctive features of each of these six conceptions, follow. The reader will find that the specific tables referenced in these descriptions (which may be found in the APPENDIX) will provide a more complete rendering of the conception portrayed.

VI.1 ORGANIZATIONAL CULTURE

This examination of TLP has revealed that a unique ‘culture’ - the singular pattern or system of behaviors and beliefs that pervades and persists in an organization, may be attributed to three entities - The TLP Organization itself, and its two component sectors - Business Organizations, and Education Organizations.
VI.1.1 The Selectively Accommodating Culture of TLP

In the Appendix, Table #1 consolidates the cultural perceptions observed and advanced about The Learning Partnership organization. The classification of these 135 norms reveals a configuration of particular, cobbled-together and adopted norms, including:

- unique norms invented by the organization itself;
- bi-cultural norms which represent an amalgamation of norms from both education and business;
- business norms TLP chooses, feels obliged or is required to adopt;
- education norms TLP chooses, feels obliged or is required to adopt;

While much of TLP's culture appears to be a reflection of its component cultures (whose descriptions follow), 14 norms can be seen to be unique to this organization. Positioned together, these norms describe a formally constituted organization with a unique name - 'The Learning Partnership', that expresses its boundary spanning role. TLP represents a new field of endeavor with employment and upward mobility opportunities. Formal rules of operation have been established to guide how the participants, drawn from different sectors, should work together. Performance expectations regarding what the organization does are still in the process of being regularly revisited and clarified. Decision-making at TLP on major policy and program issues is directed towards the senior management from each participating sector. TLP believes itself to be a charitable organization which enables and promotes inter-sector collaboration. Collaboration is viewed to be necessary and beneficial for both education and business, so long as business does not use the contact as a marketing opportunity. It is believed that collaboration with business will, through the principle of synergy, assist the education sector to pursue the difficult but required task of transformation. In the collaboration process, cultural diversity, particularly in language, is maintained and valued. Those involved associate strongly with the 'boundary spanning' role the organization serves, finding the job difficult, for the most part, because of limited available resources. At TLP intrinsic as well as extrinsic measures of success are valued.
these norms. For example, the fundamental belief in 'Verbal and Non-Verbal Communication', to honor the cultural diversity in language is played out in the informal practice of using the particular terms and jargon of business with business people, and those from education with educators. An example would be the use of the ‘Professional Development’ term: “training”, or the term: “in service”, depending on the audience.

The extent to which TLP is culturally accommodating is evident in Table #1’s Summary & Legend which shows that, of the 135 characteristics presented, compared to the 14 norms it has developed for itself, TLP has adopted 118 norms from its host cultures, singly or in combination. These invented and adopted norms form an unique constellation of formal practices, informal practices and beliefs. TLP has constituted itself to be both like and unlike other entities in business and education in a very formally prescribed way. TLP therefore represents, as Edgar Schein has stated: “a unique pattern of shared basic assumptions, invented, discovered, or developed by a given group, as it learns to cope with its problems of external adaptation and internal integration, that has worked well enough to be considered valid, and, therefore, is to be taught to new members of the group as the correct way to perceive, think, and feel in relation to those problems” (Schein, in Frost, 1991:247). Based on these criteria, TLP can be conceptually viewed as a ‘culture’.

VI.1.2/3 The Distinct and Different Cultures of Business and Education

This study clearly indicates that the two primary sectors brought together in TLP each have a distinctive organizational culture. In addition, it is clear that Business and Public Education are significantly dissimilar and, for the most part, opposite in character.

Table #2 in the Appendix, juxtaposes the formal practices, informal practices and beliefs pervasively exhibited by education and business on 111 issues relating to 14 distinct categories of working life. Each sector demonstrates the consistent patterning among formal practices, informal practices and beliefs characteristic of a distinctive ‘culture’. It can be seen that how the organization is structured, how
the participants speak and behave, and what the participants believe and mean follow a consistent, reinforcing pattern.

Witness the financial dimension of working life. Formal practices dictate that businesses must generate their revenues themselves, and measure their organizational performance in the short term based on objective, financial criteria. Businesses which are not financially self-sustaining, are required to suspend operations. These formal requirements are supported by consistent, informal practices. Resources are strategically managed to maximize return-on-investment. Business people's language, their decision-making, and how they determine the size and success of operations are strongly financially-oriented. And the belief system follows suit. Business people believe that accepting the responsibility for revenue generation and the consequences of failing to do so are the criteria by which 'accountability' is judged.

Financial matters in education can also be seen to demonstrate a distinctive, reinforcing pattern among cultural forms. In this case, revenue generation is, by formal practice, within the purview of government and has not been educators' direct responsibility. It has been the practice for the provincial government to provide grants to school boards whose tax base is insufficient to support their financial requirements. While educators do account for funds received, they are required to do so in the longer term. The performance of education is not spoken of in financial terms - but rather in subjective, value terms. Resource distribution tends to be across-the-board to support the interests of fairness. And educators believe that by judiciously recording and equitably distributing the public funds they receive, they are 'accountable'.

In Table #2, consistent patterning is evident not only within each of the 14 categories of working life - it also occurs across categories. For instance, education's formal requirement to address multiple 'Stakeholders' is played out in the category of 'Decision-making', where educators are self and cross perceived to exhibit slow, consensus-oriented decision-making; in 'Power & Authority' where educators exhibit 'achieved' power; and in 'Time' where the investment of long periods for information collection and deliberation is expected and valued. In business, cross-categorical consistency can also be observed. That shareholders in business formally cede the running of the organization to senior management is played out in the category of 'Power and Authority' where 'ascribed power' is asserted; and in 'Decision-
making' and 'Time' where decisions are noted to be made by individuals, and quick response-time is expected and valued.

That the cultures of education and business are distinctive is evident both to participants and to 'outsiders'. Self and cross perceptions are consistent - many perceptions advanced by educators about the business sector matched business people's general perceptions about themselves and vice versa. Self and cross perceptions advanced about some of the formal and many of the informal practices could be observed by a third party. For example, both educators and business people cited the fast decision-making exercised in businesses, versus the slow decision-making practiced in education. These perceptions were supported in my field note observations.

The juxtaposition of cultural characteristics in Table #2 demonstrates that business and education are distinct and profoundly different cultures. The legend and summary to Table #2 reveals that out of 111 issues relating to 14 different categories of working life presented in the table, business and education proved similar or somewhat similar on only 12 issues. In both organizational cultures:

- upward mobility has been limited due to recent downsizing
- senior management is white male dominated
- shareholder/stakeholder contact is the responsibility of the organization's senior management
- the valued management style has changed from autocratic to democratic
- the above change in management style is believed to have been motivated by the explosion in knowledge and information facilitated by the technological revolution
- centralized authority is valued by business headquarters and education boards, while local authority is valued by business's branch plants and education's schools
- role conflict occurs between senior and middle management
- teachers and professionals in business rank their associations above trade unions
- business is believed to have a role to play in public education
- business-education partnerships are perceived to be mutually beneficial.
- those that hold administrative/management positions in any organization are believed to demonstrate similar skills and functions
- every organization is thought to have its own particular language and jargon

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On these very few, principally administrative or management-related issues (a point that will be addressed in depth later), the characteristics of business and education were self and cross perceived to be ‘consistent’, as in: ‘compatible’ or ‘in harmony’ (Thompson, 1995: 285). Significantly however, for the remaining 99 issues, the characteristics perceived about and exhibited by business and education proved not only to be ‘different’, or ‘at variance’, many were ‘opposite’, ‘discordant’ and ‘incompatible’ in nature (Thompson, 1995: 688). To cite some examples: while the business culture exhibited risk-taking behaviors, education demonstrated risk-averse behaviors; while business people employed and promoted competitive language, analogies and tactics, educators discouraged competitive language and behavior, in favor of those that were collaborative and co-operative; while decision-making in business was portrayed as individual, fast and action oriented, in education it was reported to be shared, slow, and consensus oriented; while business people believed they were connected to their external environment, educators believed themselves to be isolated from it.

Business and education interviewees were consistent in their perception that the two sectors have very different cultures. No interviewee found the cultures to be more similar than different. The few similarities they referenced were far outweighed by the number of differences they cited. A number of interviewees reflected that while they thought education and business were different prior to working together at TLP, the interaction proved to them the significant extent and specific nature of the differences. And for some interviewees, the ‘other’ culture and its people weren’t just perceived to be ‘different’, they were judged to be ‘wrong’.

Cross-Cultural Judgments - those opinions and criticisms business people and educators leveled at each other’s formal practices, informal practices, and beliefs are presented and categorized in Table #3. It is interesting to compare each judgment to both the culture from which it emanates, and the culture at which it is directed. Through their cross-cultural judgments business people and educators signaled, in two ways, the strength of their cultural attachment.

First, these cross-cultural criticisms cannot be labeled as groundless ‘fictions’. They appear to be programmed cultural defense-responses that occur when another individual (or group) challenges
acustomed norms by exhibiting alien behaviors. For example, business people observed that, by formal practice, daily and yearly on-the-job time is significantly less in education than it is in business.

Educators’ on-the-job time officially ends well before 5 p.m. and educators are officially off-the-job for many weeks in the summer and during the year. That is not what business people are accustomed to. For business people working long hours means ‘working hard’, and people are expected to invest personal time on-the-job to achieve the outcomes that are sought and valued. And so, at TLP when a business person was told that the August meeting must end at 3:30 because educators are, after all, on their summer holidays, his reaction was critical and negative, echoing many of his colleagues who also judged, in one way or another that: educators: “don’t work very hard”. And that critical judgment persisted, even among these business people who have committed to working with educators, who have spent time with them, and who openly admit that they like and have learned to respect many of them. The notion that perhaps educators might informally work long hours, or that the emotional arduousness of the job might be a criteria for ‘working hard’ did not appear to be considered. It was not a part of their particular programming.

This programmed inability to ‘think out of the box’ was also evident among educators. The director who could not understand why business people did not judge him to be financially accountable was considering the issue by the parameters defined by his cultural reality. Educators receive public funds. ‘Accountability’ is judged by how judiciously the funds are recorded and spent. The Director was, in his mind, accountable. But the criteria for accountability is different in business. From a business perspective, the director did not have to generate the funds himself. They were handed to him. And he was not fired if the amount of those funds or their distribution did not meet expectations. But even after years of exposure to business people, the director was puzzled that they didn’t seem to perceive that he was accountable. Why couldn’t they see that he was?

The second indication of the strength of people’s attachment to their accustomed norms concerns the nature of the judgments rendered by each side. Of the 91 statements made by interviewees that could be characterized as judgments, business people advanced almost twice as many about education, as educators did about business. The judgments were found to fall into four classifications: a criticism, an
observation, a statement of understanding, or a compliment. For example, the statement: “Education has fewer resources to pursue goals than does business”, was interpreted to be something that a business person observed as a state of affairs, while: “Educators’ across-the-board allocation of resources is frustrating and limits the potential for growth”, was deemed to be a negative opinion, or criticism of what educators do. While business people made the same number of observations about education as educators made about business, they rendered two and a half times more criticisms about education than they received in return. And this numerical superiority holds even though many of the observations made by educators can be interpreted as veiled criticisms. These data from interviews support my observation notes that business people in TLP appeared to be more judgmental and more critical than were educators. Business appears to be a far less gentle and tolerant environment than education, and the inhabitants of that place reflect that in their judgmental behavior.

In every category, criticisms about education leveled by business people concerned norms in education that either differed from those in business, or existed in business and were found to be absent in education. The issues addressed concerned how an organization operates, such as how decisions are made, performance is measured, etc. The message that can be taken from these criticisms is: ‘the way you do things is wrong; the way we do things is right’. Their judgments pointed to a strong and singular attachment by these business people to their cultural norms - norms that center on the operation of an enterprise. And their criticisms about alternative practices and beliefs were not hedged under the guise of an observation - they were clear and direct.

What educators criticized and how they did it can be seen to be very different. In every case of a direct criticism, educators criticized business people’s behavior and beliefs about ‘education territory’ - social issues, education itself, training, testing, etc.. Few criticisms by educators were direct. Some were general, such as: “no one group should....”. Some were observations with an implied criticism, such as: “Canadian companies spend far less on p.d. (professional development) than companies elsewhere do”. And many directly or indirectly carried the message: ‘you don’t understand; if you did you’d see our
Educators’ appeared to reflect the norms of their environment, even outside that environment with other adults. 

While business people rendered only one judgment (an observation) about themselves, educators made 8 self assessments, 4 of them critical. Although small in number, these self criticisms, together with the fact that most of the similarities found between education and business involved a particular hierarchical level signaled the presence of a different cultural phenomena - Organizational Sub-culture.

**VI.2 ORGANIZATIONAL SUB-CULTURE**

In addition to revealing multiple organizational ‘cultures’, this study of TLP has also revealed patterns of behaviors and beliefs exhibited by particular groups within organizations. These patterns are evident because, for the most part, they differ from parallel practices and beliefs exhibited in the organizational culture as a whole. The existence of these ‘sub-cultures’ was found to be externally and internally perceptible in TLP itself, and in both Education and Business organizations.

**VI.2.1 Necessary Sub-Cultures at TLP**

Back in Table #1 it was revealed that TLP exhibited 14 particular norms, and 24 bi-culturally adopted characteristics. These norms reflect an accommodating culture. However, on a further 94 issues TLP is only selectively accommodating. The organization behaves *only* like business for 68 of its norms, and *only* like education in a further 26. An examination of what these selective issues are about and who exhibits them may be found in Table #4.

For TLP’s 68 norms which reflect business-like behaviors and beliefs a significant 63 of them are exhibited by TLP stewards, management and staff. TLP was constituted as a not-for-profit business, and those charged with executing that function appear to behave accordingly. On all 14

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1 I shall resist the delicious temptation to put a gender spin on the information revealed in this paragraph and the one which proceeds it.
dimensions of organizational life, the particular issues relating to TLP’s internal integration reflect and reinforce the business configuration structure it has adopted.

For those 26 norms where TLP is education-like alone: 16 are attributable to TLP members/volunteers or to staff practices with them; 5 relate to projects; and 5 reflect the particular nature of the organization. These norms can be seen to primarily reflect the organization’s external adaptation. TLP directs its efforts to the culture of education and has adapted its norms to facilitate that connection.

Within TLP therefore, two distinct and different sub-cultural patterns are evident. TLP is a not-for-profit business whose operation is directed to education organizations operating in the Greater Toronto Area. It is a private enterprise operating in a public domain. This dual character appears to necessitate the adoption of different sub-cultural norm-sets. One for what it ‘is’, another for what it ‘does’.

**VI.2.2 Distinct and Different Sub-Cultures in Education**

Observations, self-and-cross-perceptions about the culture of education revealed not only pervasive norms, but also exceptions - places where alternative formal practices, informal practices and beliefs existed. In Appendix I, these exceptions have been consolidated and categorized in Table #5. In 48 of the 111 cultural issues raised, exceptions were noted. Multiple exceptions were attributed to six particular loci within education: Boards, Board Management, Board and School Management, Principals, Directors, and Some Teachers and Federation Officials.

Almost half of the exceptions were attributed to Boards of Education. Unlike education generally, school boards were perceived: to privately demonstrate competitive behaviors; to render objective, action-oriented decision-making on some matters; to rank their stakeholders; and to perform many measurable tasks. Unlike schools, boards have a different name. They are physically configured in what is termed an adult “office” environment where role ranking is visible. There is more access to technology and information. There are no classroom responsibilities or other formal or attitudinal barriers to internal or external collaboration, or on-the-job professional development. Compared to educators at schools, people at boards follow an adult temporal orientation, formally work longer hours, are expected
to invest more personal time on-the-job, and demonstrate a greater concern for time management. They appear more concerned with facts, and not just processes, but outcomes. Unlike teachers in the classroom, their performance is evaluated more regularly, against measurable objectives. While a majority of the practices and, particularly, the beliefs demonstrated by people at boards resonate with those portrayed by educators in general, on a significant number of issues they differ. And significantly, on each of the 22 issues on which they do differ, the formal, informal practices and beliefs they exhibit are remarkably similar to business norms. That: “Boards are businesses”, and that: “Boards have more in common with businesses than they do with schools”, are very significant perceptions advanced by school board participants themselves.

Within Boards of Education are a group of people who hold management roles. This group of professional education managers including the level of Superintendent and above, were perceived to differ from education norms on nine issues. Compared to their hierarchical subordinates at boards and schools, their dress is more formal, subdued and structured. Unlike their colleagues who have union support, they believe that if they resist authority, they will be penalized. They speak an operational language that contains words they categorize as: “business terms”. As a result of recent shortfalls in government funding, board personnel were noted to be demonstrating a higher financial orientation in their language and behaviors, and exercising a shorter term focus on financial matters. Recently, they are reported to be informally pursuing revenue generation, directly, and managing those funds strategically through arms-length entities that have been structured outside the traditional organizational boundaries of education. Each of the issues on which their behavior and notions were perceived to differ from education in general were found to match those exhibited by their counterparts in business.

Board management together with Principals and Vice Principals collectively form the general management in education. This group was perceived to differ from traditional education norms on four issues. In addition to a concern for social issues exhibited by all educators, this group appeared to be very concerned about financial issues. Their positions are considered to be merited through performance and not seniority. These people have sought promotion and value it as a measure of their success. Each of these deviations from education norms reflects business norms. And in one other respect they differed
from both traditional education and business. Very recently, as a result of government equity regulations, more of them are women.

On two very significant and related issues, Principals were deemed to be an unique group. By legislative act they are empowered to make individual decisions, and thus exert ascribed authority. Not like any other manager in education. Very much like managers in business.

Different, too, are Directors of Education whose compensation was reported to be individual and not standardized, performance-based, confidential and annual. This is different than it is for anyone else in education, but similar in nature (although not, they stress, in amount) to CEO’s in business, by whose title they also like to be addressed.

There are educators (including Teachers and Federation Officials) whose group locus is defined not by their location or function, but by a particular set of beliefs. These people do not subscribe to collaboration with business. They distrust what they hold to be business’s exploitive motivation for such a relationship, holding that no outside interest, including business, should have an influential role in education matters. Many of these people want educators to maintain control of education. And some of them do not rank their federation above a trade union - they perceive that it is and needs to be, just that.

VI.2.3 Distinct and Different Sub-Cultures in Business

Table #6 includes a summary of the number of expressions of sub-cultural differences in business. Clearly this was scant in comparison to the rich amount of sub-cultural information provided by educators. None-the-less, sub-cultural differentiation in the business sector may be attributed to three principal differences: between the behaviors of big and small businesses; between the behaviors of regulated and unregulated businesses; and between business organizations in general and some of the attitudes and behaviors of their senior managements.

The opportunity for upward mobility was observed to be growing in small firms, while in ‘big business’ downsizing has become the norm. Small firms were noted to be able to realize outcomes more quickly than their bureaucratically layered superiors in size. And small firms were observed to lack the
resources to afford to invest heavily in professional development for their employees, as many large corporations have done.

Regulated businesses were noted to have less mandate and agenda control than unregulated firms, and to be required to follow equity guidelines in their hiring and promotion practices. Although industry-wide certification is generally not required, certain professions and, particularly, trades people must hold standard credentials - by government regulation. Recent regulations now require many businesses to disclose here-to-for confidential compensation information about their senior officers. Clearly, the greater the ties a business has with government, the greater the differences there will be in certain norms compared to those exhibited by firms that are not so directly affiliated.

Although business was self and cross-perceived to demonstrate a competitive orientation, business people, particularly senior managers whose work takes them outside the organization, were noted to suspend competitive behaviors 'in public for a common cause'. CEO's and people in human resource functions were observed to focus beyond the short term quarterly report. For senior management, social, and not just financial issues were observed to be gaining in importance. And some senior people endorsed a more inclusive 'stakeholder', rather than selective 'shareholder' orientation. In these respects senior business people appeared to model norms associated with the culture of education. These similarities between managers in business and their counterparts in education, together with the abundant similarities vice versa, points to a particular cultural conception that bridges these, and perhaps, all organizations - Trans-organizational Sub-culture.

VI.3 TRANS-ORGANIZATIONAL SUB-CULTURE

While juxtaposition analysis served to reveal different constellations of characteristics which pointed to the presence of organizational cultures and subcultures, it also revealed the strong presence of similarities. Upon analysis, it appeared that the majority of these similarities formed a constellation of characteristics that could be ascribed to a particular hierarchical function across organizations. This type of cultural configuration I call the: 'Trans-organizational sub-culture'.
VI.3.1 The Similarity of Management Across Organizations

Table #7 exhibits those characteristics attributed to the culture of education or any of its subcultures which are similar to business norms. Of 56 similar norms a significant 52 of these are exhibited by education entities or individuals involved in administration or management, including:

- Boards (29); Senior Management (5); Education Management (17); Board People and Principals (1).

Despite the profound characteristic differences that generally exist between business and education, a similar constellation of physical, functional and behavioral characteristics can be attributed to administrative management from both sectors:

- The physical workplaces are ‘offices’ in name, physical structure and organization in which role rank is physically visible. Only adults are present, and their temporal orientation is followed. These entities are positioned as the organizational focal point for information, precipitating the belief that through this entity the organization is connected to its environment. Following recent innovations, these offices display significant amounts of technology. These entities are capable of exercising both transformation and change - in structure as well as in practices.

- Managerial functions are non-union positions. The functions are formally made free from barriers, allowing external and internal relationships to be established, and professional development to occur during on-the-job hours. The time required to do these jobs is often lengthy and investment of personal time on-the-job is expected. Managers officially hold ascribed power, exercising in many cases individual decision-authority. Managers focus their performance on delivering outcomes. Action, preferably towards an objective target is the goal of decision-making. These functions oversee financial and other resources to ensure the economic health of the organization. Performance, rather than seniority is the basis upon which annual assessments and promotion are determined. Performance measurement, by convention against measurable objectives is accepted, and all performance is believed to be measurable.

- People who hold positions in management and/or administration tend to dress in attire that is formal, subdued and structured. They share a particular operationally-geared language and jargon. Their speech is strongly fact-oriented. And they demonstrate a concern for time management. Towards other similar
entities, they privately display language and behaviors that are strongly competitive. However, when a common cause is judged to be served by joining with competitors, collaborative language and behaviors are publicly displayed. They honor authority, particularly those officers and stakeholders to whom they report. And they believe that resistance to such authority will be penalized. Extrinsic rewards and titles are valued as signals of their success.

That there is a strong attachment to management norms was made evident in three ways. First, both educators and business people who had assumed other non-management roles (through temporary assignment or downsizing) admitted that they "missed" being "the manager" and yearned to return to that role. Second, interviewees from education management reflected a strong affiliation with the function of business management. All of these educators found that their skills, abilities and understandings were consistent with those of their hierarchical colleagues in business. Third, with the advent of budget cuts in education, managers had 'automatically' adopted norms around financial issues, such as aggressively seeking revenue opportunities, and strategic resource distribution, etc. These norms are very different from formally established education practices. The education culture itself has not changed. But the informal behavior of professional administrators has, and to do so they have had to operate, quite literally, 'outside' their resident culture - by setting up arms-length entities under which these self-generated, non-public funds are managed. Faced with a reduced operating budget, they had all automatically adopted business-like practices. Yet, none of these people had ever run a business. And none of them had ever attended business school. But they all represented the particular hierarchical level that is charged with the management of their organization.

VI.4 SOCIETAL CULTURE

Some of the perceptions advanced by those involved in TLP carried references to something larger and different in nature than organizational culture, organizational sub-culture, or trans-organizational sub-culture. People spoke about particular phenomena outside organizations that were affecting their operation, or about "everyone" or "all of us" both inside and outside organizations adopting
relatively new and similar behavior patterns. Table #8 exhibits and classifies those characteristics that informants referenced in their discourse around the issue of 'change'. Three major 'outside influences' sweeping society as a whole were mentioned to have exerted a profound effect on organizations in business and in education: changes in the economy, the advent of technological revolution, and changes in interpersonal values.

VI.4.1 Society's Economic Shifts

Both business people and educators from throughout the hierarchies referenced a "downturn" in "the economy". An economy is an isolate of the societal culture in which organizations are nested. Clearly people at TLP believed that economic shifts in the societal culture were precipitating organizational change. Business people referred particularly to profound changes in the structures and operations of big businesses which they attributed to an economic cause. Senior administrators in education explained that their adoption of new and different norms around financial issues had been stimulated by reduced government funding occasioned by reductions in the amount of taxes collected because of a contraction in the economy. Both sides referenced "downsizing" that had been economically motivated. And those from both sectors indicated that the establishment the inter-organizational connection that is TLP was, at least in part, economically motivated.

VI.4.2 Technological Revolution

One of mankind's defining characteristics which separates and elevates our species from other animals is our propensity and ability to create 'extensions' - such as tools, which serve to improve upon what our physical structure is capable of achieving. The extent and nature of a society's extensions are, according to archeologists and sociologists, important isolates of culture. TLP participants referenced the relatively recent development and proliferation of such an extension in Canadian and other societies - computer technology. The advent and particularly the proliferation of computer technology was deemed to have had a "revolutionary" effect on the availability of knowledge and information, on how people
communicate, and on how people behave. Not just people in organizations - people everywhere the technology exists. Those who traditionally were the 'keepers of knowledge' can no longer control access to it. People who used to hold authority because they controlled the knowledge have had to change their role and their behavior. And those involved at TLP have undertaken projects to bring about technological access and the adoption of attendant behaviors and values in education which is perceived to lack the resources to become technologically engaged.

VI.4.3 Shifts in Societal Values

A change in how authority is exercised was perceived to be occurring throughout and outside organizations. Management style was noted to be changing in both business and education from autocratic to democratic. Both business managers and principals were cited to be sharing more power with their hierarchical subordinates. Many teachers were observed to have moved away from exhibiting autocratic controlling behaviors in their classrooms. More women were noted to be assuming managerial roles in organizations, particularly in education. And organizations were noted to be more concerned with not just economic, but societal issues. Some organizations were noted to espouse a change in corporate orientation - from a focus on 'shareholders' to a concern for all 'stakeholders'. These changes in behavior can be seen to reflect an adjustment in organizational values mirroring profound changes in society as a whole.

Canadians in positions of authority today, and those Canadians over which they exert their authority can be seen to be very different from their predecessors. For example, organizations in the 50's and 60's were built and run by people who had been steeped in the military traditions of war. TLP's participants referenced the authoritative, in some cases militaristic nature of the adults who had raised, taught, and managed them. And they also referenced the homogenous: "Leave It To Beaver" nature of the society-that-was. Managers today have spent their formative years in peacetime. Canadian society is now much more ethnically diverse. And more women have entered the workplace. How a society believes it is required to behave in wartime is very different than it is in peacetime. Behavior that is acceptable in a homogenous society may not be acceptable in a society that is culturally heterogeneous, if harmony is to be
maintained. But clearly those behaviors and the values that underpin them take time to penetrate, change and pervade such a large, complex and powerful phenomenon as an institutionalized societal culture. TLP people noted that, even today, some people, regardless of the organization or sector in which they work, cannot seem to change their "old ways".

These three 'outside' phenomena - economics, technology, and interpersonal values were generally perceived by those involved in TLP to be issues of societal culture. And all of the people who referenced changes in societal culture appeared to take for granted the fact that their organizations not only would and should, but had to follow suit. It was generally assumed that as society goes, so do its organizations.

VI.5 AMBIGUITY

Within both the particular and categorical descriptions of this interorganizational network, as Martin and Meyerson predicted in their 'Fragmentation Perspective', certain aspects either: lacked clarity, consistency or consensus on any cultural level; or they were only achieved on an issue-specific basis. Upon analysis, it appeared that a significant amount of this ambiguity related to the dimension of: 'Roles and Responsibilities'. In Education, Business and TLP some type of role ambiguity was present. And in each case, a single, clearly defined formal practice that reflected current conditions, was absent.

VI.5.1 Role Ambiguity in Education

The most glaring example of role ambiguity at the sub-cultural level in education involves the Principals. Principals are pulled between conflicting allegiances. By legislated formal practice - they are 'management'. By formal involvement as union members - they are 'not management'. Principals themselves described their position as "schizophrenic". The simultaneous presence of these two conflicting formal practices renders the role of Principal, unclear.2

2 Although Principals and Vice Principals have recently been legislated out of union membership, a formal connection to 'management' has not yet been forged, and a high degree of ambiguity persists.
Ambiguity also surrounds the role of school boards with regard to financial matters. By formal practice, school board revenues are public funds, received from government. The traditional role of public school boards is to administer funding, not to generate it. To compensate for recent shortfalls in public funding however, arms-length entities are being established by the school boards participating in TLP through which to conduct what amounts to private enterprise 'on the side'. TLP itself can be seen as a large scale, independent 'money-maker' for the Toronto area school boards. School boards have responded to externally imposed changes by functioning in not one but two very different financial roles - as a public administrator and as a private entrepreneur. They are no longer just the former, and are not formally the latter. In this case, the existing formal practice no longer reflects current conditions.

Role ambiguity exists in education, not just in its subcultures, but in the culture itself. The system is formally constituted to foster only issue-specific, coalition-required moments of clarity, consistency and consensus. There are multiple stakeholders with heterogeneous ideologies. Governments, along with their particular conceptions about the role education should undertake, change regularly. And within the system educators themselves debate the purpose of their work. As my informants pointed out, the process of 'educating', like all social work roles, is difficult to describe. A direct attribution to outcomes is difficult to measure. Many different responsibilities can be subsumed in the education 'portfolio'. The boundaries of this role are unclear, and subject to interpretation. Consequently, there are many different interpretations about what the work involves, and should involve. The formal practice defining education's role is inherently unclear.

VI.5.2 Role Ambiguity in Business

At the sub-cultural level, those whose functions involve boundary-spanning duties, like CEO's and those in human resources, hold roles that can be seen to be ambiguous. How CEO's exercise their social functions, differs. As a CEO pointed out, "some guys are into the arts or sports. My thing is public education because I have a young child and I care about that". And a number of HR professionals reflected the notion that within business their role does not, as one put it: "fit the mold". 
At the cultural level, the social role of business organizations attracts a range of opinion. Some advocate that companies should exercise more ‘social responsibility’ by, for example, moving from a shareholder to a stakeholder focus. And there are others who argue that companies should only focus on ‘making money’ which itself (through taxation) constitutes business’s responsibility to society. The formal practices (such as government legislation) defining business behavior regarding social issues (like equity practices in hiring and promotions) offer clarity only on an issue-specific basis. Clearly, the ‘social role’ is as inherently ambiguous in business as it is in education.

VI.5.3 Role Ambiguity in TLP

TLP has attempted to reduce the ambiguity in the working relationship between business and education by developing and refining formal practices. ‘How’ the organization should function was initially codified by the steering committee, and, years later it was clarified by the ‘Future Directions’ committee. However, the organization has not yet been able to reduce the ambiguity surrounding ‘what’ the organization should do. Even after a number of years of operation, Ewing still found that TLP’s participants held many interpretations of the role TLP should play in education.

Any discussion around TLP’s role in education is frustrated by a number of cultural factors. There is, of course, the inherent ambiguity that surrounds any group’s identification of their social role.

There is the ambiguous position of TLP relative to the education system. TLP seeks to introduce systemic change where it holds no formal authority to do so. And it does not currently demonstrate the financial resources to position itself to become the formal authority. Revenues of three million (before expenses, including a significant government grant) aimed at a public system that costs well over two billion a year to run, is not significant leverage. The money or gifts in kind that TLP offers the school boards is a mere fraction of what they can generate themselves from individual partnership efforts. One board alone estimated that its partnership activities generate over seven million annually.

And, there is obvious ambiguity about the formal mandates established for TLP by the directors of education. These mandates (to improve: student literacy, student readiness, student retention and
student participation in science & technology) were debated for two years by the original committees. Few activities resulted from these deliberations. After two years only 'Take Our Kids To Work' was acknowledged to have achieved an impact that was system-wide and classroom deep. TOKW's relationship to any of the four original mandates is not easy to directly establish. Even the later project 'Hands-On-It', which does address 'science and technology' deals directly only with teachers, not with students. In addition, business people had obvious difficulty coming to grips with such lofty aspirations.

Eventually, TLP was influenced to take on a project focus. This gave business people the cultural norms to which they were accustomed - clear tasks of specified duration with outcomes that could be measured in the short term. By adopting a project focus, TLP effectively institutionalized Martin's concept of 'fragmentation' into their culture - clarity, consistency and consensus could only be found to happen on an issue (project)-specific basis. While 'what TLP is' could be conceptually viewed from an 'integration perspective', 'what TLP does' invites a 'fragmentation' perspective.

VI.6 CULTURAL MOSAIC

Yet another conception of culture could be realized from stepping back and considering the five conceptions of culture that have been addressed thus far. It is a conception that arises when one realizes that: organizational culture, organizational sub-cultures, trans-organizational sub-culture, societal culture and ambiguities can themselves represent a cultural constellation. This, I term a 'cultural mosaic'. In a mosaic, depending on your viewpoint, different patterns become manifest, but all of the embedded patterns work together in achieving an overall effect.

TLP participants are, concurrently, members of a distinct society, workers in particular types of organizations, holders of specific sorts of jobs, and volunteers for a particular cause. While it can be said that there are similarities among the 'different hats' that an individual chooses to wear, there are clearly behavioral differences a person adopts when s(he) changes hats. Two factors, that can most readily be viewed through a mosaic conception, serve to explain these differences - 'function' and 'time'.
VI.6.1 In Culture, Form Follows Function

One explanation for the profound differences between the cultures of business and education in TLP may be found by examining the structural relationship between societal culture and organizational culture. Society, for the most part through its government (the entity that performs society’s regulatory function) establishes (or avoids the establishment of) certain formal practices for the entities involved in (for example), the role of enterprise and wealth-creation. Those formal practices represent generally accepted assumptions about how these entities should serve their function. At the organizational level, these general norms (or their absence) are followed in the creation of related formal practices, informal practices and beliefs. And, (to follow the example selected), a ‘business culture’ is born.

But the norms society sets for those of its organs which serve its enterprise and wealth creation needs are very different from the norms established for those organizations charged with the education of society’s youth. Following different formal practices dictated by society, education organizations have developed their own related formal practices, informal practices and beliefs which reflect an ‘education culture’. Differences in the organizational cultures of education and business follow the different functions society expects each of them to perform.

The presence of different sub-cultures within education and business, and a similar sub-culture across them can also be functionally attributed. Much of the sub-cultural differentiation in TLP, Education and Business, tends to follow functional lines. And it is the functional similarity of those engaged in management in any sector that creates a trans-organizational milieu with its own distinctive cultural characteristics. In some cases, (such as the regulated business sub-culture and the principal sub-culture in education) sub-cultures have, to a large extent, been created by societal regulation.

Clearly there is a connected and dependent functional relationship between organizations and the society in which they are embedded. And differences in function appear to explain a great deal of the difference between and within organizational cultures.

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3 Clearly, government is not the only regulatory body in a society. However, it proved the regulatory focus for the interviewees in this study.
VI.6.2 In Culture, Time Changes the Picture

Informants in this study point to a cultural mosaic that was, and a different cultural mosaic that is in the state of becoming. They have observed changes in society’s economics, technology and values - shifts they see being accommodated through profound changes in society’s organizations. The number of organizations, how they look and function, how authority is exercised, and what knowledge is valued are changing in both education and business, according to informants. But this process of aligning the cultures of organizations with the new culture in society takes time. Pockets of ‘new’ informal practices and the ‘new’ beliefs on which they are based are exhibited along side formal practices that reflect the ‘old’ rules. This inconsistency spawns ambiguity. Clarity, consistency and consensus do not appear. They do not exist at this time. Renderings of organizational culture are snapshots taken at a particular moment in time. But culture is a dynamic phenomenon and as time changes, the picture changes.

VI.6.3 Positioning TLP In A Cultural Mosaic

When viewed from a mosaic point of view, TLP may be seen to represent a ‘transitional organizational culture’. This organization was born to function as a common meeting ground to address problems in public education for people who hold the same beliefs: that the education system should change, and that it should change to reflect a closer relationship with business while still maintaining its independence. Absent the formal authority to effect change on the system, TLP represents a formalized means to pool and access information and resources in order to informally introduce and experiment with change in the system.

Between the founding of the organization and 1996, closer but independent relationships between senior educators and business people were certainly achieved. During that time financial and human resources from the business sector were invested in developing an array of projects that all served to bring the sectors closer together. Children and teachers were brought into workplaces, and leaders from both sectors exchanged workplaces for a day. A conference was established to enable those interested in partnerships to connect, talk about and showcase them. Seminars were held in workplaces to discuss and
demonstrate how businesses could address their employees' family needs, particularly around their children's education. Business people were brought into classrooms to read to the younger children, and to talk to the older ones about being an inventor or entrepreneur. Arrangements were made for teachers to spend the summer break in a business environment. Groups of school people were paired with business people to learn about and practice changing their school culture. In addition, plans were advanced for teachers to be trained in computer literacy and encouraged to adopt the technology in their practice. And, creative technology was accessed to be brought into schools for kids' use.

Clearly, all but an exceedingly small number of TLP's founders perceived, by 1996, that the organization had served its purpose for them and shortly thereafter, they went on to other things. Since TLP was established the labour government, whose relationship with the business sector was weak, has been replaced by a conservative government with strong ties to business. Massive structural changes to the education system have been legislated. Principals have been removed from union membership. Now that new formal practices have been established in education by government, TLP is finding it more difficult to maintain and expand financial contributions from businesses, and the turnover rate among volunteers is increasing. A new facilitator has been engaged for a third Board discourse around: 'where we go from here'. Even Charlie Pielsticker, who still serves on the 1998 TLP Board of Directors, has taken up a new cause around the needs of seniors.

It appears that there is, in both education and business, a resident sub-culture that informally reflects TLP's beliefs. The motivation behind people's adoption of these beliefs span an ambiguous spectrum that is both personal and professional. This sub-cultural orientation is especially prevalent among the trans-organizational sub-culture of management. At those times when society's economy contracts and, or, the education and business sectors become profoundly disconnected, these sub-cultures are motivated to formalize their existence in a joint, organized expression - an organizational culture. This is what happened in Canada early in this century, and it is happening again as the century comes to a close. It is important to note that on the earlier issue of vocational education, once the Ontario government adopted formal practices that brought the sectors closer, those who had participated in formalized 'lobby
groups' dispersed back into their respective sectors. If recent and on-going government action to create new norms in public education are perceived to bring greater working harmony in its supply-relationship with business, TLP may very well find itself a still valued but 'transitional' culture.

VI.7 SUMMARY

The Learning Partnership of Greater Toronto is a window through which six distinct cultural configurations can be witnessed, each of which is based on a different conception of culture as it relates to organizations.

If culture is conceived to be reflected by a constellation of characteristics that exhibit organization-wide clarity, consistency and consensus, three such constellations are revealed. These include the distinct and profoundly different 'organizational cultures' of education and business, and the accommodating culture of TLP itself.

Consideration of characteristics that do not appear across a whole organization, but do form a pocket of clarity, consistency and consensus brings into focus a variety of 'organizational sub-cultures'. Sub-cultural differentiation may be noted based on function, size and ideology. Boards, general education management and principals in education, and regulated businesses and senior managers in business all reflect characteristic constellations that differ from organization-wide norms. Big and small businesses may be differentiated. And a sub-cultural line in education is clearly drawn between those who support partnerships and those who do not. In addition, the set of business-like characteristics TLP adopts to serve its internal integration are markedly different from the education-like norms it follows in its external adaptation into the public education system.

A conception of sub-culture as a phenomenon 'across' and not just 'within' organizations reveals a 'transorganizational sub-culture'. In this interorganizational network the managements of both education and business share a significant number of characteristic similarities.

Additional similarities between education and business appear if organizational culture is conceived in relation to its host environment - 'societal culture'. Informants observe that recent
transformation and change across both education and business have been enacted in response to profound changes in economics, technology and interpersonal values in society as a whole.

The concept of 'ambiguity', where multiple interpretations confound the development of clarity, consistency and consensus for all but issue-specific moments, can be seen in this network. Ambiguity appears to exist in the absence of a single, clearly defined formal practice that reflects current conditions. Such is the case at the sub-cultural level around the role of principals; about the financial role of school boards; and on the social role that should be exercised by senior business executives. At the cultural level, it appears that education, business and TLP all experience a great deal of ambiguity when attempts are made to establish what the social role of the organization should be.

The sixth conception of culture subsumes the previous five by advancing an explanation as to how all of these cultural configurations could co-exist. It is based on a notion that 'organizational cultures' are multi-dimensional, dynamic phenomena that seek to maintain cultural alignment with the society in which they are embedded. In this case, and in another parallel occurrence eighty years ago, naturally occurring sub-cultures appear to reside in education and business which involve those whose motivation is ambiguous, but who share the same values around the relationship between education and business. These sub-cultures, which include the trans-organizational management sub-culture, have become motivated to formalize their relationship into an organizational culture which will allow them to assert their values in a co-ordinated and consolidated way. They are motivated to do so by economic conditions and by the perception that a profound disconnection exists in the supply-demand relationship between these sectors in society. The form they adopt is a 'transitional culture' – an organizational culture that remains in place until the disconnection between education and business is perceived to have been addressed.
CHAPTER VII: Learnings

... about examining culture in a systemic business-education partnership

The drawing of theoretical and practical implications from this investigation has required me to reflect on what I have learned about three phenomena: about organizational culture, about research, and about The Learning Partnership of Greater Toronto.

VII.1 Learnings About Organizational Culture

"You cannot conceive the many without the one"
Plato (Dialogues, Phaedrus)

VII.1.1 About the subject

Studying culture with respect to organizations is a frustrating experience. Having amassed a huge amount of cognitive enrichment on the subject, I now have the vocabulary to discuss how little I understand and how much more there is to learn about this very complicated phenomenon. However, this investigation has helped me to establish where I stand on some very important cultural issues.

I now recognize the research culture and orientation to the subject that would lead Schein to argue for a single, all encompassing definition for organizational culture. I can also understand why no one has been able to realize that vision. The definitional disagreement among those who study organizational culture is symptomatic of a conceptual dilemma that is not limited to this field alone. Since Heraclitus and Democritus, philosophers have puzzled over ‘being as one’ and ‘being as many’ and whether those two world views could be bridged. During this study I have spent a great deal of time puzzling over how I could bring together the specific, situated, temporal information about events and personalities and the general, unsituated, timeless data concerned with properties of those events and personalities. I now realize that that kind of thinking pigeonholed me right from the start into the ‘being as one’, ‘organizations have culture’ camp that can conceive of the existence of some underlying singular reality. I found that I could ascribe the categorical to the particular - taking an event and using the data as
an explanatory tool to make meaning of the event. And I could use a particular event to underscore a categorical notion. But I could not merge the two. Events and personalities disappear when you try to force them into a table. It is evident to me that 'organizations have culture'. But I could not deny the notion that 'organizations are culture' as well. So, I chose to represent TLP as an organization that 'has culture' as well as an organization that 'is culture'. As Bruner suggests, the world views may be "irreconcilable", but they can supportively co-exist. This notion positions me within the approach to scientific thinking advocated in education by Soltis (1984), in science by Tucker (1990), and by Martin and Meyerson (1987) in studies of organizational culture. Their respective "tri-dimensional", "holographic", or "three perspective" approaches to research all address problems in consideration of multiple viewpoints. To the purists who dismiss this approach as the absence of a position, Soltis points out that: "open-mindedness is not empty-mindedness...and it is not tolerance of all views good or bad. It is having a sincere concern for truth" (1984:9). I believe that in any examination of the human condition, 'truth' is better served through a mosaic of interpretations.

VII.1.2 About Martin & Meyerson's Framework

"If I have seen further...it is by standing upon the shoulders of Giants"
Sir Isaac Newton (February 5, 1675/6)

Martin & Meyerson admit that their "Three Perspective Framework" was conceived around the notion that 'organizations are culture' (1987:623). That is perhaps why Martin titled her book: "Cultures in Organizations". This study shows that their approach applies not only to culture 'in', but also to culture 'across' organizations. In the particular information presented in the case study about TLP, one can identify clarity, consistency and consensus at both the cultural and sub-cultural levels. And there is evidence of ambiguity. Their 'Three Perspectives' approach also applies when addressing an interorganizational network following the notion that 'organizations have culture'. The categorical data on TLP also reflects characteristics that are organization-wide, characteristics that appear in sub-cultural pockets, and some characteristics that are ambiguous.
This study does not materially change Martin & Meyerson's fundamental notions. It expands on them to account for a different type of organizational context. There is a new trans-organizational construct. But it still qualifies as a sub-cultural manifestation of a 'Differentiation Perspective'. There is a particular emphasis on the role society plays in organizational cultures. But Martin and Meyerson do acknowledge this. And the cultural mosaic that ties all of the conceptions together follows Martin's prediction that: "a fourth perspective would have to be defined in terms of these three variables" (1992:190).

The most significant addition to Martin & Meyerson's, and particularly Martin's work is the introduction of that configuration I call a 'transitional culture'. This expands on Martin's positioning of 'integration' as a temporal state. She indicates that while any organization constantly reflects each of the perspectives, during different time periods, and under different conditions, one perspective appears to be dominant. Being a critical feminist, she prefers to say that: "two are suppressed" (1992:178). According to Martin, firms appear to move from fragmentation into integration and thence into differentiation stages as they come into being and mature. In addition, changes in the external environment tend to, as Martin puts it, "jolt" organizations out of the integration phase and through differentiation and fragmentation until the integration is re-established. It seems to me that both of these notions hold up if the frame of reference encloses only one organization. But if the frame is expanded to include multiple organizations, it is possible to conceive of a different organizational growth pattern and a different response to a societal 'jolt'. In this case, I have concluded that two sub-cultures, each resident in different cultures, who lack the formal authority to address change in education can be seen to create a transitional culture. The move is from differentiation to integration (although all three perspectives (Martin would remind us) are always present). The integrated state lasts as long as the participants deem it to be useful. Eventually the differentiated state resumes - the culture disperses back into its sub-cultural configurations. Clearly more investigation is needed to identify how and to what extent these informal networks foster organizational cross-fertilization and change.

These are small contributions to the tremendous achievement that is Martin & Meyerson's "Three Perspective Framework". Clearly, as much as I sought to approach this investigation without being
influenced by any particular orientation, their notions coloured mine. If I have done nothing but bring about greater attention to this framework in the field of education, I will be well pleased.

In approaching culture in this holistic way, I discovered my strongly functionalist-structuralist orientation and its limitation in explaining cultural phenomena. I really do see culture as an integrated system where one aspect is related to another. But culture cannot be described by formal practices and function alone, as important as they are in determining the patterns of such integration. I am a functionalist who clearly does not ignore trade unions or external political and economic influences. For me, there is more 'going on' in a culture than can be functionally explained or controlled by management. What is going on is, in fact, too much to wrap your mind or your tongue around. And, for now we are forced to see only a part at a time, and to describe what we see, awkwardly. Rather than adding to the definitional confusion by cobbng my own interpretation, at this point I find a great deal of merit in the description advanced by Hamada (1994:27):

*The power of the culture metaphor is in its holistic orientation. It unites various aspects of organizational phenomena such as the individual cognitive processes, languages and symbolic aspects, behavioral manifestations, material products, socio-political structures of power and hegemony, and wider and larger environments of the organization, that all contribute to sharing, creating, contesting, denying, interpreting and changing human activities.*

**VII.2 Learnings About Research**

**VII.2.1 About The Locus Of Investigation**

"To this place, and the kindness of these people, I owe everything"  
Abraham Lincoln (Farewell Address, Springfield Illinois, February 11, 1861)

Clearly, the systemic business-education partnership that was selected for this investigation proved to be a useful and welcoming locus. The fact that it was systemic (an 'interorganizational network', and not simply a 'pair-wise IOR'), provided enough scope for generalizations to be made. The 'newness' of the organization allowed me to capture a dimension of cultural consciousness among the

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1 IOR = Interorganizational Relationship
participants that may be absent in entrenched relationships. Even in this case it could be observed that, over time, cultural familiarity appeared to diminish participants' sensitivity to cultural issues.

In formalized interorganizational relationships like TLP, it is the participants themselves, and not the researcher, who establishes the bounded entity. This overcomes the problem of reification that has plagued many previous cultural studies conducted on multiple organizations, where the connection has had to be established by the researcher. Another problem encountered in cultural studies is the difficulty in finding cultural participants who have the specialized knowledge to qualify as 'informants'. However, in this case all of the participants directly experienced cultural juxtaposition. This juxtaposition served to stimulate cultural self-awareness. It also helped informants to describe and explain both their own and the other culture, since it is much easier to portray one culture relative to another. As a result, a large number of participants were positioned to be 'informants'. In addition, it is usually the researcher who is in the exclusive position of being able to make cultural comparisons. The basis of his or her comparison-making is restricted by the lenses prescribed by his or her own cultural affiliations. In this case the informants were drawing comparisons as well, thus allowing the basis of comparison to be broadened beyond a single, researcher-focused point of view.

In this study, while it could be said that I prompted the informants to draw stereotypical comparisons, it was abundantly clear, particularly by their readiness to do so, that 'to stereotype' appears to be a natural disposition. It was interesting to note that many people could be seen to espouse one notion about the 'other' culture, while actually believing another - such as the businessman who would speak to how hard teachers work and actually hold them to be, generally, lazy. This prompts me to wonder if in this era of political correctness, our belief system itself has morphed into two levels - one visible and one hidden. One may wonder about the longevity of cultural bridges built only on espoused values, and about what this does to people and to culture. These notions point to the need for a deeper investigation into the psycho-social phenomena of stereotyping and what it means.

Unlike some other doctoral candidates whose research work, they confide, has been frustrated by personalities and events connected with their investigation site, I have been fortunate to have encountered no obstacles in my work at and about TLP. It appears to me that four major factors contributed to the ease
of this investigation. I firmly believe that extensive fieldwork helps to overcome the mistrust that is often
at the root of resistance to the researcher and/or the research process. For most of my informants I wasn’t
researching their job. It was their volunteer work, which is a much less threatening prospect. The decision
to be interviewed was made by the informants themselves, and by no outside authority who could deny
permission. And I offered interviewees the opportunity to review and edit their observations and thoughts.

I would not hesitate to recommend a systemic business-education partnership as an excellent
research window for comparative studies on organizational cultures, or as a means to gather information
on one of the cultural parties through juxtaposition analysis. In this configuration, the participants may be
viewed together, allowing the researcher access to real-time comparative data on how the participants deal
with the same category or issue. And the juxtaposed situation enables informants to provide rich and
meaningful self-and-cross-cultural input. I would, however, be cognoscente, (particularly if the study
focused on the ‘partnership’ aspect of the network), that the people who populate business-education
partnerships represent only one side of the judgmental spectrum about such relationships. Further
investigation is needed to probe the extent and nature of partnership commitment within the education
and business sectors.

VII.2.2 About The Investigation

““The road to resolution lies by doubt:
The next way home’s the farthest way about.”
Francis Quarles (Emblems, 1635)

While the ethnographic research approach selected for this investigation may be seen to have
been effective, it cannot be said to have been efficient. The criteria by which effectiveness is judged
depends upon the type of research undertaken. Clearly this study would not meet the effectiveness
standards of quantitative or critical research, nor was it intended to. Developing grounded theory,
according to the authors of the approach - Glaser and Strauss, should result in: “a reasonably accurate
statement of the matters studied, that...is couched in a form possible for others to use in studying a similar
area, and that (the researcher) can publish...with confidence”(1967:224). These authors recognize that
those who undertake the grounded theory approach will encounter: "the problem of conveying credibility" (228).

The credibility of this study rests on the degree to which this work reflects the criteria defining 'reliability' and 'validity' for ethnographic research. To support external reliability I have: identified the background and orientation that I bring to this investigation; carefully described the informant selection criteria; identified and described the data collection techniques; explained as far as possible the techniques used to analyze the data; addressed the physical, social and interpersonal contexts within which the data were generated; explicitly identified the cultural and methodological theories employed; and I have selected categories, characteristics and concepts that are not idiosyncratic. In order to address internal reliability I have used direct quotes from informants. There are multiple examples from field notes. And much of the data is available in audio and video-tape form.

A certain degree of validity accompanies any longitudinal field study, since the setting is naturalistic and not researcher-contrived, and opportunities exist to ensure that the categories used do reflect participant reality. Internal validity has been addressed by: relying strongly on the informants' own words to establish categories; constantly comparing data collected at different times; and ensuring that informants represented the range of variation in the population. The data gathered from informants was confirmed through triangulation. Moreover, informants were deliberately sought who represented dissenting opinions.

External validity deserves some discussion in this case. There is no doubt that there was significant data to draw generalizations with confidence. The question is, generalizations to what? Generalizations that would apply to other systemic partnerships? Yes. Generalizations that would apply to all types of interorganizational relationships? Not yet. Glaser and Strauss indicate that: "multiple comparison groups make the credibility of the theory considerably greater" (1967:231). This investigation covered only one substantive area within the spectrum of substantive possibilities in interorganizational relations. Consequently, the theory developed would be classified as: 'substantive' but not 'formal'. Comparability and translatability across other types of IOR configurations needs to be confirmed.
Glaser and Strauss suggest that credibility is enhanced if, in addition to being reliable and valid, the reader of the material finds that she or he get: "caught up in the description so that (s)he feels vicariously that he was also in the field" (1967:230). The three readers I recruited to ensure that the text was clear indicated that they did develop a feeling for what it would be like to have been part of TLP. However, I personally feel dissatisfied with the case study. The second phase of the case study in which membership and financing changes were identified and projects were explained was necessary information, but it interrupted the flow of the story. In addition, I believe that a more ‘in the moment’ graphic description of a ‘day in the life’ or a particular meeting would have breathed more life into the chronicle. For me, it was not ethnographic enough. Clearly I have more learning to do about ethnographic writing.

About the effectiveness of this study I am confident. I am less confident about this study’s achievement of efficiency for three good reasons. First, quite frankly, this was not my goal. Second, emergent studies aren’t efficient. And third, my inexperience at researching frustrated the achievement of efficiency.

I have spent my business life consumed by being efficient. Consequently, there never was enough time or money to stop and reflect, to try different angles, to explore the research moment rather than racing through to the quick, effective solution. This investigation allowed me to experiment with all sorts of research techniques, and to follow where the research led. The time, resources and outcome expectations were all my own. I made it clear to TLP management that they could not expect practical ‘deliverables’ to result from this doctoral dissertation. Although I was offered office space at TLP I deliberately did not accept this kind gesture. I wanted to control access to my data. I didn’t want to set up expectations by being there, or expectations by not being there when it came time to withdraw from the site. TLP management, staff and participants were very understanding about not placing demands on this work, although they did, rightly, develop expectations around my research work for them in my participating-observer role. Reactions by people at TLP to my work changed from asking when I’d be ‘done’, to asking if there would be ‘a bottom line’ to the work, to expressions of doubt in the form of well-meaning barbs and jokes that I would ever finish. They do, however, want to know and, I believe, deserve
to know what I have found out about them through this study. Their reactions to the work will undoubtedly prove useful. The job now is to find an efficient way to communicate this information and data to them, since few of them would have the time, or the patience to digest this dissertation.

It is, I believe, a great pity that most Ph.D. students must choose the efficient road, since they do not have the resources to use their dissertation as an opportunity to 'play' at research. It is an opportunity that quickly vanishes when the student crosses the threshold into the constrained world of professional research. It is easy to understand why the 'organizational climate' approach appeals to the vast majority of education professionals interested in culture. Ethnographic research is a far less predictable approach. Because it is emergent, there is the ever-present tendency to 'go off' on unproductive tangents. Lengthy involvement in field work, and the application of various data collection techniques add to the tremendous investment of time required. And it is a 'hard sell' for those pitching for underwriting to support their research efforts.

There are, thankfully, benefits for taking the 'long road'. I am convinced that a greater understanding of what people mean is elicited through face-to-face contact; and that people have valuable insights about culture that cannot be captured within the spatial and conceptual framework that binds any questionnaire.

There is a difference between not being constrained by the need to do efficient research, and doing research inefficiently. The latter occurred in this case because of my inexperience. In retrospect, a number of my decisions were time consuming and unproductive. I believe that I spent too long at the site before deciding to pursue interviewing. I knew too little about what to look for at the start, and it was through the comments of interviewees that my cultural sensitivity was really developed. Once interviewing commenced, my observations were much more fruitful. While acting as a 'participating observer' with a TLP committee generated many important insights, there was a significant loss of time incurred in performing the research duties I had committed to carry out for this committee. The determination to attribute quotes in the case study, but not to attribute quotes in the data analysis was made after all the transcriptions had been completed. Transcribing over fifty very long interviews is not only tremendously time-consuming, it indeed qualifies as 'cruel and unusual punishment'. With
hindsight, the more productive decision would have been to formally transcribe only those portions that related to the case study where the informants would be named.

Ultimately, according to Goetz and LeCompte (1984), dissertations that merit the granting of the doctoral degree must not only be clear, comprehensive and credible. They must be 'significant'. Two criteria determine significance: "the extent to which a study both makes a contribution to existing knowledge and is applicable within the discipline" (1984:234). I have put forth the argument, well supported in both related and collateral literature, that the cultural examination of business-education partnerships (or of any other interorganizational relationship for that matter) has not been done previously. This research does qualify as original. More important than its originality, however, is the contribution this study makes in both corroborating and refining Martin & Meyerson's conceptions of organizational culture.

This study has both theoretical and pragmatic applicability. However, I recognize that this work may not resonate with some conceptions of organizational culture. What I have done will prove, conceptually, to be too little for some, and too much for others. When I first began the doctoral program in education, coming out of the orientation of an MBA, I experienced very great difficulty in learning to appreciate literature on critical pedagogy, rather than just crying 'biased!' and dismissing it out of hand. While I have found that I can not personally adopt the critical persuasion in my work, I can now genuinely value that voice and even admire it spoken well. That experience leads me to ask only that this work be judged 'in kind', and that any criticism be channeled into more research in this area, which can only help to further my understanding.

VII.3 Learnings About TLP

This dissertation offers a wealth of data that merits pragmatic analysis. It is my contention that such an undertaking requires a very different 'headspace' than that required for the production of this academic dissertation. In addition, a great deal more insight would be possible from involving some of the key participants in the data analysis. Therefore, I am currently attempting to re-configure the data into a
form that TLP participants can easily work with, and developing a process by which we'll attempt, together, to make practical sense of the data and information. Meanwhile, I have made a few observations on what TLP might make of some cultural differences and similarities uncovered through this study.

VII.3.1 About Cultural Differences

"Like - But oh how different!"
William Wordsworth ('Yes, It was the Mountain Echo, 1807)

Given the profound differences that exist between education and business, the fact that these cultures have been able to coexist and cooperate for an extended period without significant conflict is a tribute to the cultural environment created by the broker of this relationship - TLP and its board, management and staff. Clearly, the accommodating characteristics invented or taken on by TLP and the collaborative process by which the formal practices were established have allowed each side to participate as equals, without any fear of cultural intimidation or assimilation. While collaboration between business people and educators at TLP has increased their understanding of each others' culture, and they have learned new language, the contact did not make educators into business people nor business people into educators. Even after prolonged exposure, the participants continued to exhibit the cultural characteristics of their home cultures. This leads me to believe that the cultural environment created by the broker or hub of the interorganizational network is a critical factor in the nature and duration of the interorganizational relationship.

While diversity has been respected, problems have arisen due to cross-cultural ignorance. The participants from both sectors demonstrated a sensitivity for only some aspects of culture. They noticed the language and behaviors of those from the other culture. But while many were sensitive to cross-cultural informal practices few appeared to be aware of beliefs and in particular, formal practices. Beliefs were inferred, and rarely confirmed. On a number of issues, participants clearly were unaware of the rules and traditions of the other culture. On occasion, because of this ignorance, unfair judgments were rendered based on expectations that the other culture could not fulfill due to existing constraints. As numerous
cross-cultural judgments revealed, notwithstanding the general harmony that prevails, there are silent antagonisms between these two sectors. And some of these antagonisms are undeserved. I believe that TLP should strongly consider using the data from this dissertation in the development of a cultural orientation for its volunteers. Such an effort may help to reduce myths, misunderstandings and unfair expectations that do exist, even in this accommodating cultural environment.

Cultural differences and personal differences appear to contribute to the ambiguity that exists in TLP around how the organization should serve its function. TLP's repeated efforts to find 'a' direction through collaborative discourse have served to bring to participants' attention the existence of a wide range of interpretations, but no obvious single direction has materialized. In such a fragmented milieu two issues become clear. First, TLP's decision to adopt a project focus appears to be the most workable approach to the fragmented nature of the milieu. Second, such an ambiguous environment calls out for leadership that recognizes the need to continually sell the organization and its projects. In this network the large degree of 'difference' can quickly turn into 'indifference' without a persuasive visionary at the helm.

VII.3.2 About Cultural Similarities

"Birds of a feather will gather together"
Latin Proverb

Sub-cultural analysis has revealed that the similarities that exist between education and business reside primarily among those in management, and that the differences between education and business become more pronounced the farther away you get from the hierarchical top of the organizations. The functional common ground that appears to precipitate cultural affiliation among executives from both sectors does not exist among lower level employees. Although TLP appears to recognize this difference and the challenges it creates, two management groups with significant lower level influence are significantly underrepresented in TLP. Principals, who are powerful and influential gatekeepers in education have not been invited to become seriously involved. And partnership directors at school boards, even those who do not offer territorial challenges, do not feel valued by this organization. In addition, TLP might consider developing stronger ties with public relations and human resource specialists and
their influential organizations for the purpose of recruiting volunteers from the business sector. These two highly social business functions exhibit subcultural characteristics that resonate most closely with the culture of education.

TLP is an umbrella under which individuals representing profoundly different beliefs and practices, understandings and identities gather. And, the cultural constituents sometimes do not respect nor understand each other. It is ripe with ambiguity. None-the-less, members of TLP do share an overarching purpose which supplies the glue that allows the participants to feel a 'sameness' about themselves, and a 'difference' between themselves and outsiders. Certainly this sense of purpose has to do with serving the learning needs of children and young adults. However, there is a concurrent cultural purpose. That is the notion that education and business have a relationship in society that needs to be mended - that the two sectors should come together in order to learn how to establish an unthreatening working relationship. By 1996 it was generally perceived that the time had come to apply that learning - that the organization had matured out of the, "let's learn to work together" stage and needed to: "deliver the goods".

However, there is significant evidence in this study that 'the learning stage' is, even now, far from over at TLP. As the members of TLP's steering committee found, people from cultures that are profoundly different do not learn to work together over night. It could well be that in terms of: 'delivering the goods', the enabling of these two cultures to learn how to work together is: 'the goods'. The populations of the education and business sectors in the Toronto GTA are huge. Educators generally represent the belief that business associations and organizations in the Toronto GTA offer education little but criticism. Business people are rightly accused of criticizing without understanding the current educational environment. There is powerful evidence of educator distrust and ignorance about business, and fears about business's motivation in their involvement in education. Recent radical changes in education by government have provoked a lot of negative feeling among educators. And some of that negative feeling is being directed at what some believe to be the accomplice in these government actions - the business sector. There is ample evidence in support of a functional niche for an organization involving businesses who seek to work with, and not against or at the expense of, public educators, during these very
difficult times. In fact, what the project (any project) is about may be less important than the fact that the project enables educators and business people to work together for the benefit of students. If the cumulative effect of all of this ‘learning to work together’ creates a better understanding between educators and business people, that may well be the real, ‘system-wide and classroom deep’ impact TLP is searching for.

However, it appears that ‘learning to work together’ as a goal or result is an ‘unmentionable’ at TLP. This is not the kind of tangible outcome that most business people can easily relate to. And for educators who seek to deflect union criticism, it is safer ground to focus on the kids as the recipients of TLP activities. It is my position, however, that TLP’s purpose as a transitional culture is tied up in bringing the sectors closer together. In fact, all of the projects replicated to date focus directly on adults from business and education learning to work together. TLP addresses children’s learning only indirectly. TLP and its business partners don’t deal directly with children, but with educators in the system. For me, the name of the organization can and should be interpreted to hold a double meaning. ‘The Learning Partnership’ is a partnership that learns about each other, as much as it is a partnership that supports the learning of society’s youth.
GUIDE TO TABLES #9 & #1-8

Table #9 in this appendix consolidates, in the form of a cultural mosaic, all of the triangulated cultural characteristics revealed through this study. The excerpt below shows the first of fourteen categories presented in Table #9 to illustrate the format of this two-part table.

**FORMAT OF TABLE #9:**

<table>
<thead>
<tr>
<th>FORM</th>
<th>COMPETITION</th>
<th>TLP</th>
<th>BUSINESS</th>
<th>EDUCATION</th>
</tr>
</thead>
</table>
| Formal Practice | Opportunity for Competition | -Restricted for competitors to TLP  
-Membership by competitors is unrestricted for Business/restricted for Education | Generally Unrestricted | Restricted |
| Informal Practice | Orientation in Language and Behaviors  
-Externally Competitive  
-Internally Collaborative | Competitive | Collaborative |
| Belief | Definition of ‘Competitors’ | Anyone Seeking Charitable Funding | Anyone Producing Similar/Institute Product/Service | Only Those Similarly Instructed/Funded by Government |
| Belief | Rationale for Competitive Orientation  
-Principle of Synergy Requires Collaboration | Principles of Economics  
Necessitate Competitiveness | Principles of Psychology and Sociology Encourage Collaboration |

**EXCEPTION**

B = Business  
E = Education  
* = None Referenced

**Generalized Characteristics**

- Public Educators don't seem to recognize that there are competitive alternatives to public education  
- By ignoring and discouraging competitive behaviors Educators demonstrate a blindness to economic reality  
- Public Educators think their position is immune from competition  
- Competition in Education is going to increase  
- If school systems can compete, new systems will replace them

- If Education were to be as competitive as Business, private schools would serve the elite, underfunded public schools would serve the disadvantaged, and society would be polarized

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Tables #1 through #8 represent frameworks within which different constellations of related characteristics drawn from Table #9 are juxtaposed and classified. Each of the tables can be described as follows:

<table>
<thead>
<tr>
<th>TABLE #</th>
<th>CONCEPTUAL FOCUS (FOCI*)</th>
<th>LOCUS (LOCI) OF THE INTERORGANIZATIONAL NETWORK ADDRESSED</th>
<th>TREATMENT OF THE CULTURAL DATA</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Organizational Culture</td>
<td>Hub</td>
<td>Juxtaposes and Classifies TLP Characteristics</td>
</tr>
<tr>
<td>2</td>
<td>Organizational Culture</td>
<td>Both Spokes</td>
<td>Juxtaposes and Compares Business and Education Characteristics</td>
</tr>
<tr>
<td>3</td>
<td>Organizational Culture</td>
<td>Both Spokes</td>
<td>Juxtaposes and Classifies Cross-Cultural Judgments</td>
</tr>
<tr>
<td>4</td>
<td>Organizational Sub-Cultures</td>
<td>Hub &amp; Spokes</td>
<td>Juxtaposes and Classifies TLP's Adopted Characteristics from Business &amp; Education</td>
</tr>
<tr>
<td>5</td>
<td>Organizational Sub-Cultures</td>
<td>One Spoke</td>
<td>Juxtaposes and Classifies Education Characteristics &amp; Exceptions</td>
</tr>
<tr>
<td>6</td>
<td>Organizational Sub-Cultures</td>
<td>The Other Spoke</td>
<td>Juxtaposes and Classifies Business Characteristics &amp; Exceptions</td>
</tr>
<tr>
<td>7</td>
<td>Trans-Organizational Sub-Culture</td>
<td>Hub &amp; Spokes</td>
<td>Juxtaposes and Classifies Similarities Between Education Culture/ Sub-Culture &amp; Business</td>
</tr>
<tr>
<td>8</td>
<td>Societal Culture</td>
<td>Spokes</td>
<td>Juxtaposes and Classifies Selected Characteristics from Business &amp; Education that Reflect Change</td>
</tr>
<tr>
<td>9</td>
<td>*Inter-Cultural Mosaic</td>
<td>Hub &amp; Spokes</td>
<td>Juxtaposes all Characteristics and Cross-Cultural Judgments</td>
</tr>
</tbody>
</table>

*Inter-Cultural Mosaic
*Anti-Cultural Ambiguity

Tables #1-8 each offer a *Legend and Summary* which identifies each classification and how many occurred in the data. Following each *Legend and Summary*, the data is presented in *Detail*. The presentation of the detailed data closely follows the format established for Table #9.
TABLE #1:
Conceptual Focus - Organizational Culture
Locus - Hub of the Interorganizational Network
Juxtaposition & Classification of TLP Characteristics

<table>
<thead>
<tr>
<th>CLASSIFICATION</th>
<th>NUMBER</th>
</tr>
</thead>
<tbody>
<tr>
<td>(U) Characteristic is unique to TLP</td>
<td>14</td>
</tr>
<tr>
<td>(+) Similar to characteristics from both Business &amp; Education</td>
<td>24</td>
</tr>
<tr>
<td>(B) Similar to Business characteristic only</td>
<td>68</td>
</tr>
<tr>
<td>(E) Similar to Education characteristic only</td>
<td>26</td>
</tr>
<tr>
<td>(N/A) Issue on which no characteristic is evident</td>
<td>3</td>
</tr>
<tr>
<td>Total Characteristics</td>
<td>135</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>CULTURAL FORM</th>
<th>ISSUE</th>
<th>TLP CHARACTERISTIC &amp; CLASSIFICATION</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>COMPETITION</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Formal Practice</td>
<td>Opportunity for Competition</td>
<td>(E) Restricted for competitors to TLP</td>
</tr>
<tr>
<td>Informal Practice</td>
<td>Orientation in Language and Behaviors</td>
<td>(+) Both Competitive and Collaborative with Other Partnerships</td>
</tr>
<tr>
<td>Belief</td>
<td>Definition of 'Competitors'</td>
<td>(U) Anyone Seeking Charitable Funding</td>
</tr>
<tr>
<td>Belief</td>
<td>Rationale for Competitive Orientation</td>
<td>(U) Principle of Synergy Requires Collaboration within Territorial Boundaries</td>
</tr>
<tr>
<td><strong>DECISION-MAKING</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Formal Practice</td>
<td>Decision Authority</td>
<td>(B) Individual by Management re: Staff and Operation Matters</td>
</tr>
<tr>
<td>Informal Practice</td>
<td>Decision-Making Rate</td>
<td>(B) Fast for Policy and Program Selection Decisions</td>
</tr>
<tr>
<td>Informal Practice</td>
<td>Decision-Making Goals</td>
<td>(-) Consensus and Action on Objective Target</td>
</tr>
<tr>
<td>Informal Practice</td>
<td>Decision Compliance</td>
<td>(E) Collaborative with/among Members</td>
</tr>
<tr>
<td>Belief</td>
<td>Resistance to Decision Authority</td>
<td>(B) By TLP Staff: Resistance Will Be Penalized</td>
</tr>
<tr>
<td>Belief</td>
<td>Decision-Making Orientation Rationale</td>
<td>(E) By Participants: Resistance Will Not be Penalized</td>
</tr>
<tr>
<td><strong>EXTERNAL &amp; INTERNAL RELATIONSHIPS</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Formal Practice</td>
<td>Organizational Connection to External Environment</td>
<td>(B) Direct to Business</td>
</tr>
<tr>
<td>Formal Practice</td>
<td>Barriers to Internal/External Collaboration</td>
<td>(E) Availability and Cultural Differences for Volunteers</td>
</tr>
<tr>
<td>Informal Practice</td>
<td>Employee Experience Outside Org./Field</td>
<td>(B) Extensive and Growing With Other Partnerships</td>
</tr>
<tr>
<td>Belief</td>
<td>Rationale for Orientation to Collaboration</td>
<td>(U) Collaboration is Necessary</td>
</tr>
<tr>
<td>Belief</td>
<td>Perceived Relationship to External Environment</td>
<td>(B) Connected With</td>
</tr>
<tr>
<td>Belief</td>
<td>Rationale for Business-Education Partnerships</td>
<td>(U) Mutually Beneficial Except Where Product Marketing is the Objective</td>
</tr>
<tr>
<td><strong>FINANCIAL MATTERS</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Formal Practice</td>
<td>Revenue Generation Responsibility</td>
<td>(B) Management and Stewards of the Organization itself</td>
</tr>
<tr>
<td>Formal Practice</td>
<td>Financial Period Focus</td>
<td>(B) Short Term</td>
</tr>
<tr>
<td>Formal Practice</td>
<td>Organizational Performance Criteria</td>
<td>(+) Financial and Non-Financial</td>
</tr>
<tr>
<td>informal Practice</td>
<td>Degree of Financial Orientation in Language &amp; Behaviors</td>
<td>(B) High</td>
</tr>
<tr>
<td>informal Practice</td>
<td>Resource Management Strategy</td>
<td>(B) Strategic</td>
</tr>
<tr>
<td>belief</td>
<td>Definition of &quot;Financial Accountability&quot;</td>
<td>(+) Generate Money and Accept Penalty if Not and Judicially Record and Spend Donations</td>
</tr>
<tr>
<td>performance &amp; Its Measurement</td>
<td>Organizational Performance Assessment Period</td>
<td>(B) Short Term</td>
</tr>
<tr>
<td>Formal Practice</td>
<td>Employee Performance Assessment Period</td>
<td>(B) Annual</td>
</tr>
<tr>
<td>formal practice</td>
<td>Organizational Performance Expectations</td>
<td>(C) Clear and Accepted on How the Organization Operates, but Unclear and Ambiguous on What the Organization Should Do</td>
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<tr>
<td>informal practice</td>
<td>Employee Performance Criteria</td>
<td>(B) Moving Towards Evaluation Against Measurable Objectives</td>
</tr>
<tr>
<td>informal practice</td>
<td>Performance Orientation</td>
<td>(+) Focus on Outcomes and Processes</td>
</tr>
<tr>
<td>belief</td>
<td>Perception of Performance Measurability</td>
<td>(B) All Performance is Measurable</td>
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<td>belief</td>
<td>Perceived Risk of Poor Performance</td>
<td>(B) High for Staff</td>
</tr>
<tr>
<td>belief</td>
<td>Definition of &quot;Measure&quot;</td>
<td>(B) Document</td>
</tr>
<tr>
<td>belief</td>
<td>Acceptance of Performance Measurement</td>
<td>(B) High</td>
</tr>
<tr>
<td>power &amp; authority</td>
<td>Type of Power Exercised by Management</td>
<td>(B) Ascribed power over staff</td>
</tr>
<tr>
<td>formal practice</td>
<td>Locus of Mandate &amp; Agenda Control</td>
<td>(B) The Organization's Stewards and Management</td>
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<td>informal practice</td>
<td>Acceptance of Authority</td>
<td>(B) Expected by employees</td>
</tr>
<tr>
<td>informal practice</td>
<td>Extent of Reward/ Penalty Tools to Exercise Power</td>
<td>(B) Many for staff</td>
</tr>
<tr>
<td>belief</td>
<td>Expected Consequence for Resistance to Authority</td>
<td>(B) Termination for staff</td>
</tr>
<tr>
<td>belief</td>
<td>Preferred Locus of Authority</td>
<td>(+) Centralized</td>
</tr>
<tr>
<td>professional development</td>
<td>Recruit Requirement for Industry Standard Professional Development</td>
<td>(B) Limited for Staff</td>
</tr>
<tr>
<td>formal practice</td>
<td>Opportunity for On-the-Job Professional Development</td>
<td>(B) Not Limited</td>
</tr>
<tr>
<td>informal practice</td>
<td>Term for Professional Development</td>
<td>(+) &quot;Training&quot; when addressing business people and &quot;In-Service&quot; when addressing educators</td>
</tr>
<tr>
<td>informal practice</td>
<td>Focus of Professional Development</td>
<td>(+) How to Do It and How to Teach It</td>
</tr>
<tr>
<td>informal practice</td>
<td>Recruit Induction/Mentoring Programs</td>
<td>(E) Not Provided for Staff</td>
</tr>
<tr>
<td>informal practice</td>
<td>Investment in Professional Development</td>
<td>(E) Increasingly Provided for Volunteers</td>
</tr>
<tr>
<td>belief</td>
<td>Perceived Value for Professional Development</td>
<td>(B) P.D. is Necessary</td>
</tr>
<tr>
<td>belief</td>
<td>Perceived Risk for Not Pursuing Professional Development</td>
<td>(B) High for Staff</td>
</tr>
<tr>
<td>belief</td>
<td>Definition of &quot;Learning&quot;</td>
<td>(E) &quot;Learning&quot; is the acquisition and application of knowledge</td>
</tr>
<tr>
<td>promotions &amp; reward systems</td>
<td>Upward Mobility Path</td>
<td>(B) Not Prescribed for Staff</td>
</tr>
<tr>
<td>formal practice</td>
<td>Industry Standard Credentials</td>
<td>(B) Not Required for Promotion of Staff Members</td>
</tr>
<tr>
<td>formal practice</td>
<td>Opportunity for Upward Mobility</td>
<td>(U) Increasing due to Expansion for Staff</td>
</tr>
<tr>
<td>formal practice</td>
<td>Compensation and benefits for Management and Professionals</td>
<td>(B) For Staff - Not Standardized, Performance-based, Confidential, Annual</td>
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<tr>
<td>formal practice</td>
<td>Board &amp; Management Demographic</td>
<td>(E) White Male/Female Mgmt.</td>
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<td>informal practice</td>
<td>Criteria determining Retention/ Promotion</td>
<td>(B) For Staff - Performance</td>
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<tr>
<td>informal practice</td>
<td>Range and Type of Incentive Offerings</td>
<td>(B) Wide Range of Financial and Non-Financial Perks for Staff and Volunteers</td>
</tr>
<tr>
<td>belief</td>
<td>Perception of Job Security</td>
<td>(B) Low among Staff</td>
</tr>
<tr>
<td>belief</td>
<td>Valued Measures of Success</td>
<td>(U) Intrinsic and Extrinsic for Staff</td>
</tr>
<tr>
<td>belief</td>
<td>Intrinsic for Volunteers</td>
<td></td>
</tr>
<tr>
<td>risk-taking</td>
<td>Structure For Risk</td>
<td>(B) Risk-prone</td>
</tr>
</tbody>
</table>
| Informal Practice | Orientation in Language and Behaviors | (B) Risk-taking in nature  
|                  |                                | (E) Risk-averse in practice  
| Belief           | Rationale for Risk Orientation | (+) To Pursue Outcomes Risk-taking is Required, but Project Implementation Requires a Risk-averse Approach  

**ROLES & RESPONSIBILITIES**

| Formal Practice | Organizational Roles | (+) Social and Economic  
| Formal Practice | Affiliation Status of Management/Professionals | (B) Staff Not Unionized  
| Informal Practice | Clarity and Acceptance of Organizational role | (B) High  
| Informal Practice | Board and Management Role Designations | (B) Directors, President and CEO, V.P., Manager...  
| Informal Practice | Management Style | (+) 'Democratic Facilitators'  
| Informal Practice | locus of Role Conflict | (+) Between TLP and some Board Partnership Directors  
| Belief           | Role Affiliation | (U) Commitment to Boundary Spanner Role  
| Belief           | Perception of Skill / Function Similarity | (+) Among 'administrators', 'managers'  
| Belief           | Rationale for Change in Management Style | N/A  
| Belief           | Perception About Affiliation Status of Professionals | N/A  
| Belief           | Perception of Business Participation in Public Education | (+) Business has a role in public education, and education role requires business involvement and support  

**STAKEHOLDERS**

| Formal Practice | Criteria for Stakeholder Recognition | (+) Financial Investment for businesses, but Geographic location for Boards of Education  
| Formal Practice | Title of Organizational Stewards | (B) Board of Directors  
| Formal Practice | Frequency of Stakeholder/Board Involvement | (B) Members = Once/Year & Board = Avg. Once/ Month  
| Formal Practice | Authority to Run the Organization | (E) Shared between Management and the Board  
| Formal Practice | Board Member Selection Process | (B) Selected by Sr. Officers of the Board & Ratified as a State by Members  
| Informal Practice | Stakeholder Contact Responsibility | (+) Senior Management  
| Informal Practice | Stakeholder Differentiation | (U) Does Not Rank Stakeholders  
| Belief           | Board Ideological Composition | (B) Homogeneous  
| Belief           | Perception Towards Diverse Interests/Opinions | (B) Outside Diverse interests should be acknowledged and informed but can’t be accommodated unless they have an instrumental value for the organization  

**TIME**

| Formal Practice | Outcomes Realization Period | (B) Short Term for Financial Outcomes  
| Formal Practice | Decision-Making Time | (B) Short for policy/project selection  
| Formal Practice | Formal On-The-Job Time | (B) Long for project implementation  
| Formal Practice | Demographic Temporal Orientation | (B) Adults  
| Informal Practice | Role & Place Turnover | (E) Relatively Low for staff  
| Informal Practice | Sense of Urgency in Language & Behaviors | (B) High  
| Informal Practice | Concern for Time Management at Meetings | (B) High  
| Informal Practice | Investment of Personal Time On-The-Job | (B) Expected  
| Belief           | Rationale for Time Orientation | (+) The Time Frame Needs of Business and Education are Different and Must both be Accommodated  
| Belief           | Criteria for "working hard" | (B/U) Time and Resource Related  

**TRANSFORMATION & CHANGE**

| Formal Practice | Structure for Change | (B) Flexible  
| Formal Practice | Losses of Authority to Effect Structural Transformation | (B) The Organization  
| Informal Practice | Losses of Recent Organizational Change | (B) Structure and Processes  
| Informal Practice | Rate of Change | (B) Fast  
| Belief           | Perception of the Change Process | (U) Change is Difficult but can be Facilitated Through Inter-Organizational Relations  

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<table>
<thead>
<tr>
<th>Belief</th>
<th>Attitude to Change</th>
<th>(B) There is High Risk to Not Being Able to Effect Change</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>VERBAL &amp; NON-VERBAL COMMUNICATION</strong></td>
<td></td>
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<tr>
<td>Formal Practice  Workspace Name</td>
<td>(U) &quot;TLP&quot;, &quot;The Partnership&quot;, &quot;the/ our Office&quot;</td>
<td></td>
</tr>
<tr>
<td>Formal Practice  Workspace Physical Structure</td>
<td>(B) &quot;Office&quot; Structure Designed, Configured and Decorated for Adult Individuals</td>
<td></td>
</tr>
<tr>
<td>Formal Practice  Presence of Technology</td>
<td>(B) Pervasive</td>
<td></td>
</tr>
<tr>
<td>Formal Practice  Access to Information</td>
<td>(+) Direct for Business, but Often Indirect for Education</td>
<td></td>
</tr>
<tr>
<td>Formal Practice  Role Rank Visibility</td>
<td>(B) Apparent in office space features</td>
<td></td>
</tr>
<tr>
<td>Informal Practice Dress</td>
<td>(B) Staff adopt business attire</td>
<td>(+) Business members appear to ‘dress down’ and education members appear to 'dress up' for meetings</td>
</tr>
<tr>
<td>Informal Practice Jargon For Administrative Headquarters</td>
<td>N/A</td>
<td></td>
</tr>
<tr>
<td>Informal Practice Nature of Speech Patterns, Language, Jargon</td>
<td>(+) Terms and phrases from both Education and Business are used depending on audience</td>
<td></td>
</tr>
<tr>
<td>Informal Practice Language Orientation</td>
<td>(+) Facts and People</td>
<td></td>
</tr>
<tr>
<td>Informal Practice Approach to Speaking</td>
<td>(B) Reserved for Staff</td>
<td></td>
</tr>
<tr>
<td>Informal Practice Degree of Explanation in Speech</td>
<td>(E) High for Staff</td>
<td></td>
</tr>
<tr>
<td>Informal Practice Tolerance for Confrontation</td>
<td>(B) Relatively High for Staff</td>
<td></td>
</tr>
<tr>
<td>Informal Practice Patience Level in Communication Reception</td>
<td>(E) Relatively High for Staff</td>
<td></td>
</tr>
<tr>
<td>Informal Practice Communication Response Rate</td>
<td>(E) Relatively Fast for Staff</td>
<td></td>
</tr>
<tr>
<td>Belief Primary Qualities Valued in Communications</td>
<td>(+) Brevity/Usefulness and thoroughness/understanding depending on audience</td>
<td></td>
</tr>
<tr>
<td>Belief About Organizational Language</td>
<td>(U) Each sector has its own particular words and language patterns which must be accommodated</td>
<td></td>
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</table>
### TABLE #2:

**Conceptual Focus - Organizational Culture**  
Loci - Spokes of the Interorganizational Network  
Juxtaposition & Comparison of Business & Education Characteristics

<table>
<thead>
<tr>
<th>CLASSIFICATION</th>
<th>NUMBER</th>
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<tbody>
<tr>
<td>(D) Issues on which characteristics are Different</td>
<td>99</td>
</tr>
<tr>
<td>(S) Issues on which characteristics are Similar</td>
<td>10</td>
</tr>
<tr>
<td>(SS) Issues on which characteristics are Somewhat Similar</td>
<td>2</td>
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<tr>
<td>Total Issues</td>
<td>111</td>
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#### Details:

<table>
<thead>
<tr>
<th>CULTURAL FOCUS</th>
<th>ISSUE &amp; COMPARISON</th>
<th>BUSINESS CHARACTERISTIC</th>
<th>EDUCATION CHARACTERISTIC</th>
</tr>
</thead>
<tbody>
<tr>
<td>COMPETITION</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Formal Practice</td>
<td>Opportunity for Competition (D)</td>
<td>Generally Unrestricted</td>
<td>Restricted</td>
</tr>
<tr>
<td>Informal Practice</td>
<td>Orientation in Language and Behaviors (D)</td>
<td>Competitive</td>
<td>Collaborative</td>
</tr>
<tr>
<td>Belief</td>
<td>Definition of ‘Competitors’ (D)</td>
<td>Anyone Producing Similar/Substitute Product/Service</td>
<td>Only Those Similarly Mandated/Funded by Government</td>
</tr>
<tr>
<td>Belief</td>
<td>Rationale for Competitive Orientation (D)</td>
<td>Principles of Economics Necessitate Competitiveness</td>
<td>Principles of Psychology and Sociology Encourage Collaboration</td>
</tr>
<tr>
<td>DECISION-MAKING</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Formal Practice</td>
<td>Decision Authority (D)</td>
<td>Individual</td>
<td>Shared</td>
</tr>
<tr>
<td>Informal Practice</td>
<td>Decision-Making Goals (D)</td>
<td>Action on Objective Target</td>
<td>Consensus on Subjective Target</td>
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<tr>
<td>Informal Practice</td>
<td>Decision Compliance (D)</td>
<td>Immediately Noticed</td>
<td>Not Immediately Noticed</td>
</tr>
<tr>
<td>Belief</td>
<td>Resistance to Decision Authority (D)</td>
<td>Will Be Penalized</td>
<td>Will Not Be Penalized</td>
</tr>
<tr>
<td>Belief</td>
<td>Decision-Making Orientation Rationale (D)</td>
<td>The Need to Deliver Outcomes in a Competitive Environment Necessitates Fast Decision-Making</td>
<td>The Need to Accommodate People’s Needs Necessitates Collaboration and Careful Deliberation</td>
</tr>
<tr>
<td>EXTERNAL &amp; INTERNAL RELATIONSHIPS</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Formal Practice</td>
<td>Organizational Connection to External Environment (D)</td>
<td>Direct</td>
<td>Indirect through Trustees</td>
</tr>
</tbody>
</table>
| Formal Practice | Barriers to Internal/External Collaboration (D) | None Apparent | - Absence of Technology  
- Physical Isolation  
- Union Restrictions |
| Informal Practice | Employee Experience Outside Organization/Field (D) | Many | Few |
| Informal Practice | Extent of Inter-Organizational Collaboration (D) | Extensive and Growing | Limited |
| Belief | Rationale for Orientation to Collaboration (D) | Collaboration is Necessary When Required | Collaboration is Difficult to Arrange and Can Signal Incompetence |
| Belief | Perceived Relationship to External Environment (D) | Connected With | Isolated From |
| Belief | Rationale for Business-Education Partnerships (S) | Mutually Beneficial | Mutually Beneficial |
| FINANCIAL MATTERS | | | |
| Formal Practice | Revenue Generation Responsibility (D) | The Organization Itself | Government |
| Formal Practice | Financial Period Focus (D) | Short Term | Long Term |
| Formal Practice | Organizational Performance Criteria (D) | Financial | Non-Financial |
| Informal Practice | Degree of Financial Orientation in Language & Behaviors (D) | High | Low |
| Informal Practice | Resource Management Strategy (D) | Strategic | Across-the-Board |
| Belief | Definition of ‘Financial Accountability’ (D) | Make Money and Accept Penalty if Not | Judicially Record and Spend Public Funds Granted |

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<table>
<thead>
<tr>
<th>PERFORMANCE &amp; ITS MEASUREMENT</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Formal Practice</strong></td>
</tr>
<tr>
<td><strong>Formal Practice</strong></td>
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<tr>
<td><strong>Informal Practice</strong></td>
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<tr>
<td><strong>Informal Practice</strong></td>
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<tr>
<td><strong>Belief</strong></td>
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<tr>
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<tr>
<td><strong>Belief</strong></td>
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</table>

<table>
<thead>
<tr>
<th>POWER &amp; AUTHORITY</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Formal Practice</strong></td>
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<tr>
<td><strong>Formal Practice</strong></td>
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<tr>
<td><strong>Informal Practice</strong></td>
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<tr>
<td><strong>Informal Practice</strong></td>
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<tr>
<td><strong>Belief</strong></td>
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<tr>
<td><strong>Belief</strong></td>
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<tr>
<td><strong>Belief</strong></td>
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</table>

<table>
<thead>
<tr>
<th>PROFESSIONAL DEVELOPMENT</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Formal Practice</strong></td>
</tr>
<tr>
<td><strong>Formal Practice</strong></td>
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<tr>
<td><strong>Informal Practice</strong></td>
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<tr>
<td><strong>Informal Practice</strong></td>
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<tr>
<td><strong>Informal Practice</strong></td>
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<tr>
<td><strong>Informal Practice</strong></td>
</tr>
<tr>
<td><strong>Belief</strong></td>
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<tr>
<td><strong>Belief</strong></td>
</tr>
<tr>
<td><strong>Belief</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>PROMOTIONS &amp; REWARD SYSTEMS</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Formal Practice</strong></td>
</tr>
<tr>
<td><strong>Formal Practice</strong></td>
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<tr>
<td><strong>Formal Practice</strong></td>
</tr>
<tr>
<td><strong>Formal Practice</strong></td>
</tr>
<tr>
<td><strong>Informal Practice</strong></td>
</tr>
<tr>
<td><strong>Informal Practice</strong></td>
</tr>
<tr>
<td><strong>Belief</strong></td>
</tr>
<tr>
<td><strong>Belief</strong></td>
</tr>
</tbody>
</table>
### RISK-TAKING

<table>
<thead>
<tr>
<th>Practice</th>
<th>Structure Risk (D)</th>
<th>Risk-prone</th>
<th>Risk-averse</th>
</tr>
</thead>
<tbody>
<tr>
<td>Formal Practice</td>
<td>Orientation in Language and Behavior (D)</td>
<td>Risk-taking</td>
<td>Risk-averse</td>
</tr>
<tr>
<td>Informal Practice</td>
<td>Rationale for Risk Orientation (D)</td>
<td>Survival requires risk-taking</td>
<td>It is difficult to muster the support, authority and resources to take risks</td>
</tr>
</tbody>
</table>

### ROLES & RESPONSIBILITIES

<table>
<thead>
<tr>
<th>Practice</th>
<th>Organizational Roles (D)</th>
<th>Economic</th>
<th>Social</th>
</tr>
</thead>
<tbody>
<tr>
<td>Formal Practice</td>
<td>Affiliation Status of Management/Professionals (D)</td>
<td>Not unionized</td>
<td>Unionized</td>
</tr>
<tr>
<td>Informal Practice</td>
<td>Clarity and Acceptance of Organizational role (D)</td>
<td>High</td>
<td>Low</td>
</tr>
<tr>
<td>Informal Practice</td>
<td>Board and Management Role Designations (S)</td>
<td>Directors, President, CEO, COO, CFO, V.P., Mgr., Supervisor</td>
<td>Trustees, Director, Superintendent, Principal, Vice Principal</td>
</tr>
<tr>
<td>Informal Practice</td>
<td>Management Style (S)</td>
<td>Has Changed from “Autocratic Controller” to “Democratic Facilitator”</td>
<td>Is Changing from “Autocratic Controller” to “Democratic Facilitator”</td>
</tr>
<tr>
<td>Informal Practice</td>
<td>Locus of Role Conflict (S)</td>
<td>Between Senior and Middle Management</td>
<td>Between Board Officials and Principals</td>
</tr>
</tbody>
</table>

### STAKEHOLDERS

<table>
<thead>
<tr>
<th>Practice</th>
<th>Criteria for Stakeholder Recognition (D)</th>
<th>Financial Investment</th>
<th>Geographic Residence</th>
</tr>
</thead>
<tbody>
<tr>
<td>Formal Practice</td>
<td>Title of Organizational Stewards (D)</td>
<td>Board of Directors</td>
<td>Board of Trustees</td>
</tr>
<tr>
<td>Formal Practice</td>
<td>Frequency of Stakeholder/Board Involvement (D)</td>
<td>Shareholders = Once/Year</td>
<td>Voters = Approx. Every Four Years</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Board = Avg. Once/Month</td>
<td>Board = Twice/Month</td>
</tr>
<tr>
<td>Formal Practice</td>
<td>Authority to Run the Organization (D)</td>
<td>Ceded to Management Officers</td>
<td>Shared between Management, Government and Trustees</td>
</tr>
<tr>
<td>Formal Practice</td>
<td>Board Member Selection Process (D)</td>
<td>-Selected by Sr. Officers of the Board -Rated as a slate by shareholders</td>
<td>-Self-selected -Individually elected by the public</td>
</tr>
<tr>
<td>Informal Practice</td>
<td>Stakeholder Contact Responsibility (S)</td>
<td>Senior Management</td>
<td>Board Senior Management</td>
</tr>
<tr>
<td>Informal Practice</td>
<td>Stakeholder Differentiation (D)</td>
<td>Ranks Stakeholders</td>
<td>Does Not Rank Stakeholders</td>
</tr>
<tr>
<td>Belief</td>
<td>Board Ideological Composition (D)</td>
<td>Homogeneous</td>
<td>Heterogeneous</td>
</tr>
<tr>
<td>Belief</td>
<td>Perception Towards Diverse Interests/Opinions (D)</td>
<td>Diverse interests can be accommodated if they have an instrumental value for the company</td>
<td>Diverse interests should be accommodated if at all possible</td>
</tr>
</tbody>
</table>

### TIME

<table>
<thead>
<tr>
<th>Practice</th>
<th>Outcomes Realization Period (D)</th>
<th>Short Term</th>
<th>Long Term</th>
</tr>
</thead>
<tbody>
<tr>
<td>Formal Practice</td>
<td>Decision-Making Time (D)</td>
<td>Short</td>
<td>Lengthy</td>
</tr>
<tr>
<td>Formal Practice</td>
<td>Formal On-The-Job Time (D)</td>
<td>Longer than Education</td>
<td>Shorter than Business</td>
</tr>
<tr>
<td>Formal Practice</td>
<td>Demographic Temporal Orientation (D)</td>
<td>Adults</td>
<td>Children</td>
</tr>
<tr>
<td>Informal Practice</td>
<td>Role &amp; Place Turnover (D)</td>
<td>High</td>
<td>Low</td>
</tr>
<tr>
<td>Informal Practice</td>
<td>Sense of Urgency in Language &amp; Behavior (D)</td>
<td>High</td>
<td>Low</td>
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<tr>
<td>Informal Practice</td>
<td>Concern for Time Management at Meetings (D)</td>
<td>High</td>
<td>Low</td>
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<tr>
<td>Informal Practice</td>
<td>Investment of Personal Time On-The-Job (D)</td>
<td>Expected</td>
<td>Discretionary</td>
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<td>Belief</td>
<td>Rationale for Time Orientation (D)</td>
<td>The Need for Decisiveness calls for Short Time Frames</td>
<td>The Need for Deliberation requires Long Time Frames</td>
</tr>
<tr>
<td>-------</td>
<td>-----------------------------------</td>
<td>-----------------------------------------------------</td>
<td>--------------------------------------------------</td>
</tr>
<tr>
<td>Transformation &amp; Change</td>
<td>Structural Transformation (D)</td>
<td>Becoming More Flexible</td>
<td>Inflexible</td>
</tr>
<tr>
<td>Formal Practice</td>
<td>Locus of Authority to Effect Structural Transformation (D)</td>
<td>The Organization</td>
<td>Government</td>
</tr>
<tr>
<td>Informal Practice</td>
<td>Locus of Recent Organizational Change (D)</td>
<td>Structure and Processes</td>
<td>Processes</td>
</tr>
<tr>
<td>Informal Practice</td>
<td>Rate of Change (D)</td>
<td>Fast</td>
<td>Slow</td>
</tr>
<tr>
<td>Belief</td>
<td>Perception of the Change Process (D)</td>
<td>Change is Difficult without the Threat of Termination</td>
<td>Change is Difficult and Can be Pointless</td>
</tr>
<tr>
<td>Belief</td>
<td>Attitude to Change (D)</td>
<td>There is a High Risk For Not Changing</td>
<td>There is a High Risk for Changing</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Verbal &amp; Non-Verbal Communication</th>
</tr>
</thead>
<tbody>
<tr>
<td>Workspace Physical Structure (D)</td>
</tr>
<tr>
<td>Presence of Technology (D)</td>
</tr>
<tr>
<td>Formal Practice</td>
</tr>
<tr>
<td>Role Rank Visibility (D)</td>
</tr>
<tr>
<td>Formal Practice</td>
</tr>
<tr>
<td>Jargon For Administrative Headquarters (D)</td>
</tr>
<tr>
<td>Nature of Speech Patterns, Language, Jargon (D)</td>
</tr>
<tr>
<td>Language Orientation (D)</td>
</tr>
<tr>
<td>Approach to Speaking (D)</td>
</tr>
<tr>
<td>Degree of Explanation in Speech (D)</td>
</tr>
<tr>
<td>Tolerance for Confrontation (D)</td>
</tr>
<tr>
<td>Patience Level in Communication Reception (D)</td>
</tr>
<tr>
<td>Communication Response Rate</td>
</tr>
<tr>
<td>Belief</td>
</tr>
<tr>
<td>Belief</td>
</tr>
</tbody>
</table>
TABLE #3:  
Conceptual Focus - *Organizational Culture*  
Loci - Spokes of the Interorganizational Network  
Juxtaposition & Classification of Cross-Cultural Judgments

<table>
<thead>
<tr>
<th>JUDGMENT CLASSIFICATION</th>
<th>BY BUSINESS ABOUT EDUCATION</th>
<th>BY BUSINESS ABOUT BUSINESS</th>
<th>BY EDUCATION ABOUT BUSINESS</th>
<th>BY EDUCATION ABOUT EDUCATION</th>
<th>TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>(C) Criticism</td>
<td>35</td>
<td>0</td>
<td>10</td>
<td>4</td>
<td>49</td>
</tr>
<tr>
<td>(O) Observation</td>
<td>17</td>
<td>1</td>
<td>17</td>
<td>4</td>
<td>39</td>
</tr>
<tr>
<td>(U) Understanding</td>
<td>1</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>2</td>
</tr>
<tr>
<td>(C) Complement</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>Total</td>
<td>54</td>
<td>1</td>
<td>28</td>
<td>8</td>
<td>91</td>
</tr>
</tbody>
</table>

Note: No Judgment Made (*)  
Note: Judgments have been edited slightly for the sake of brevity

### Details:  
**SOURCE**  
**JUDGMENT & CLASSIFICATION**

**COMPETITION**  
**Business Judgments About Education**  
(O) - Public Educators don’t seem to recognize that there are competitive alternatives to public education  
(C) - By ignoring and discouraging competitive behaviors. Educators demonstrate a blindness to economic reality  
(C) - Public Educators think their position is immune from competition  
(O) - Competition in Education is going to increase  
(O) - If school systems can't compete, new systems will replace them  
**Education Judgments About Business**  
(O) - If Education were to be as competitive as Business, private schools would serve the elite, underfunded public schools would serve the disadvantaged, and society would be polarized

**DECISION-MAKING**  
**Business Judgments About Education**  
(O) - In education, collaboration is an end in itself unlike business where it is a means to an end  
(C) - Education decision-making lacks authority and action  
(C) - The prolonged time educators take to make decisions is frustrating  
**Education Judgments About Business**  
*  

**EXTERNAL AND INTERNAL RELATIONSHIPS**  
**Business Judgments About Education**  
(C) - In spite of changes, education remains an isolated, insular, ghettoized, balkanized ivory tower  
(O) - Educators are involved in partnerships with business because of scarce resources  
(O) - Educators mistrust business people  
(C) - Educators forget that business people are also parents and have personal educational agendas  
(U) - Educators who say that business people criticize education without understanding that experience, are correct  
**Business Judgments About Business**  
(O) - Business people are involved in partnerships for altruistic reasons, but corporately, especially in the case of high tech companies, its a business opportunity couched under social "do-goodism"  
**Education Judgments About Business**  
(U) - Business will want to influence graduate skills, the curriculum and cost to achieve them  
(O) - Business has recently learned that what happens in elementary and secondary schools is as influential on graduates as what happens in university  
(C) - No one group, including business should be able to subvert the democratic process and directly influence schools to follow a corporate worldview  
**Education Judgments About Education**  
(O) - Traditional principals are threatened by collaboration with the community because they are used to dictating to the community and have not been equipped with the skills to collaborate with it  
(C) - Unlike board people who experience many schools, teachers whose experience involves only one school are very parochial  
(C) - People in education who criticize partnerships believe, incorrectly, that business will take over control

**FINANCIAL MATTERS**  
**Business Judgments**  
(O) - Education has fewer resources to pursue goals than does business  
(C) - Educator’s across-the-board allocation of resources is frustrating and limits the potential for growth

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|About Education| (C) - By not understanding, being uncomfortable with, and finding financial matters distasteful, educators, particularly teachers are ignoring reality
|Education Judgments About Business| (O) - Education has fewer resources to pursue goals than does business
|Performance & Its Measurement| (O) - Business people don’t think educators are financially accountable

|Business Judgments About Education| (C) - Educators are not as accountable for their performance as business people
|Performance & Its Measurement| (C) - Education lacks proper performance measurement
|Performance & Its Measurement| (C) - Lacking proper performance measurement makes the determination of what is better and what to change difficult in education
|Performance & Its Measurement| (O) - Educators don’t agree on what the output should be
|Performance & Its Measurement| (C) - Evidence indicates that education’s performance is poor

|Business Judgments About Business| (C) - Business people don’t understand evaluation and testing
|Power & Authority| (O) - Business people’s focus on standardized testing is wrong
|Power & Authority| (O) - Business people (and any other outsider who criticize education are basing their evaluation on old, personal experience and not on a current understanding of the system

|Business Judgments About Education| (C) - Principals and teachers have too much power in education to resist top-down authority
|Power & Authority| (O) - Board management could exercise more power if they were encouraged
|Power & Authority| (O) - While business people have the power to control their jobs, educators do not

|Business Judgments About Education| (C) - Business has an inferior understanding of professional development compared to education (most)
|Professional Development| (C) - Business has a superior understanding of professional development compared to education (high tech, p.d. specialist firms)
|Professional Development| (O) - Teachers don’t need p.d. during the year because they have the summers to pursue p.d
|Professional Development| (C) - Teachers lack p.d. exposure to business to make their instruction more relevant and current
|Professional Development| (O) - Educators claim to have effective training, but many employees don’t use what they have been taught
|Professional Development| (C) - Canadian companies spend far less on p.d. than companies elsewhere do

|Business Judgments About Education| (O) - Educators ‘educate’ and do not use the business term ‘training’ because the term is negatively perceived and associated with business
|Professional Development| (C) - The lack of new recruit induction programs and mentoring in education has resulted in negative experiences for recruits

|Business Judgments About Education| (C) - Educators are paid regardless of the level of performance
|Promotions & Reward Systems| (C) - Educators promote ‘old behaviors’
|Promotions & Reward Systems| (O) - Business leaders receive greater compensation than education leaders
|Promotions & Reward Systems| (C) - Some educators are not earning their pay cheques

|Business Judgments About Education| (O) - In Education the system and the people don’t take risks
|Risk Taking| (C) - The Education structure and operation is moribund because management won’t take the risk to change it
|Risk Taking| (O) - CEO’s and Directors can take more risks than others in their organizations

|Business Judgments About Education| (O) - Some teachers cannot give up control
|Roles & Responsibilities| (C) - A unionized professional is an oxymoron, and teachers who are unionized can’t expect to be treated as professionals
|Roles & Responsibilities| (O) - Many teachers have an anti-business bias
|Roles & Responsibilities| (C) - People in the education system use the children as a cover for the pursuit of self interests

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<table>
<thead>
<tr>
<th>STAKEHOLDERS</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Business</strong></td>
</tr>
<tr>
<td>Judgments About Business</td>
</tr>
<tr>
<td>(O) - Boards are business operations</td>
</tr>
<tr>
<td>(O) - Boards have more in common with businesses than they do with schools</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>TIME</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Business</strong></td>
</tr>
<tr>
<td>Judgments About Education</td>
</tr>
<tr>
<td>(C) - Education has abundant management, but very little discernible accountability</td>
</tr>
<tr>
<td>(O) - In Education it is difficult to determine &quot;who’s the boss&quot;</td>
</tr>
<tr>
<td>(C) - Education's requirement to serve so many constituent needs is frustrating</td>
</tr>
<tr>
<td>(C) - The heterogeneous and changing ideologies of boards of education is unproductive</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>TRANSFORMATION &amp; CHANGE</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Business</strong></td>
</tr>
<tr>
<td>Judgments About Education</td>
</tr>
<tr>
<td>(C) - Education, unlike other working environments has not physically /structurally changed in a century (6 C's) - Education is change averse because: people don’t feel empowered to change; education lacks a termination crisis to motivate change; the practice of allocating resources 'across-the-board' makes change look too expensive; educators don’t know how to change; the system has no mechanism to sustain change; the political nature of the system prohibits the development of a single vision that is required for transformation</td>
</tr>
<tr>
<td>(O) - Public education must change or it will be replaced by an alternative system</td>
</tr>
<tr>
<td>(C) - Business people don’t realize how much education has changed because they haven’t been there for a long time</td>
</tr>
<tr>
<td>(O) - Business people are negatively influenced by a negatively disposed local media in their perception of education</td>
</tr>
<tr>
<td>(C) - Businesses have not changed as much as they claim they have</td>
</tr>
<tr>
<td>(O) - Both business and education are becoming less autocratic and more democratic because all of us in society are moving that way</td>
</tr>
</tbody>
</table>
TABLE #4:
Conceptual Focus - Organizational Sub-Cultures
Loci - Hub & Spokes of the Interorganizational Network
Juxtaposition & Classification of TLP’s Adopted Characteristics

<table>
<thead>
<tr>
<th>Legend &amp; Summary: CLASSIFICATION OF:</th>
<th>CLASSIFICATION OF:</th>
</tr>
</thead>
<tbody>
<tr>
<td>TLP BEHAVIORS AND BELIEFS REFLECTING</td>
<td>TLP BEHAVIORS &amp; BELIEFS REFLECTING</td>
</tr>
<tr>
<td>BUSINESS-LIKE CHARACTERISTICS (B)</td>
<td>EDUCATION-LIKE CHARACTERISTICS (E)</td>
</tr>
<tr>
<td>* Characteristics Relating to TLP</td>
<td>* Characteristics Relating to TLP Members/ Volunteers</td>
</tr>
<tr>
<td>Stewards/Mgmt./Staff</td>
<td>or Staff Practice with Volunteers</td>
</tr>
<tr>
<td>** Characteristics Relating to Physical Structure</td>
<td>** Characteristics Relating to Projects</td>
</tr>
<tr>
<td>Total Characteristics</td>
<td>Total Characteristics = 56</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>CULTURAL FORM</th>
<th>ISSUE</th>
<th>TLP BEHAVIORS &amp; BELIEFS REFLECTING BUSINESS-LIKE CHARACTERISTICS</th>
<th>TLP BEHAVIORS &amp; BELIEFS REFLECTING EDUCATION-LIKE CHARACTERISTICS</th>
</tr>
</thead>
<tbody>
<tr>
<td>COMPETITION</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Formal Practice</td>
<td>Opportunity for Competition</td>
<td>*(B) Individual by Management re: Staff and Operation Matters</td>
<td>*** (E) Restricted For competitors to TLP</td>
</tr>
<tr>
<td>Informal Practice</td>
<td>Orientation in Language and Behaviors</td>
<td>*(E) Collaborative with/among Members</td>
<td></td>
</tr>
<tr>
<td>DECISION-MAKING</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Formal Practice</td>
<td>Decision Authority</td>
<td>*(B) Fast for Policy and Program Implementation Matters</td>
<td>** (E) Slower on Project Implementation Decisions</td>
</tr>
<tr>
<td>Informal Practice</td>
<td>Decision-Making Rate</td>
<td>*(B) Not Immediately Noticed among TLP Staff</td>
<td>** (E) Not Immediately Noticed among Project Participants from Education</td>
</tr>
<tr>
<td>Informal Practice</td>
<td>Decision Compliance</td>
<td>*(B) By TLP Staff: Resistance Will Be Penalized</td>
<td>*(E) By Participants: Resistance Will Not Be Penalized</td>
</tr>
<tr>
<td>Belief</td>
<td>Resistance to Decision Authority</td>
<td>*(E) Indirect via Boards to Schools</td>
<td></td>
</tr>
<tr>
<td>EXTERNAL &amp; INTERNAL RELATIONSHIPS</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Formal Practice</td>
<td>Organizational Connection to External Environment</td>
<td>*(B) Direct to Business</td>
<td>*(E) Indirect via Boards to Schools</td>
</tr>
<tr>
<td>Formal Practice</td>
<td>Barriers to Internal/External Collaboration</td>
<td>*(B) None Apparent for Staff</td>
<td>*(E) Availability and Cultural Differences for Volunteers</td>
</tr>
<tr>
<td>Informal Practice</td>
<td>Extent of Inter-Organizational Collaboration</td>
<td>*(B) Extensive and Growing With Other Partnerships</td>
<td></td>
</tr>
<tr>
<td>Belief</td>
<td>Perceived Relationship to External Environment</td>
<td>*(B) Connected With</td>
<td></td>
</tr>
<tr>
<td>FINANCIAL MATTERS</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Formal Practice</td>
<td>Revenue Generation Responsibility</td>
<td>*(B) Management and Stewards of the Organization Itself</td>
<td></td>
</tr>
<tr>
<td>Formal Practice</td>
<td>Financial Period Focus</td>
<td>*(B) Short Term</td>
<td></td>
</tr>
<tr>
<td>Informal Practice</td>
<td>Degree of Financial Orientation in Language &amp; Behaviors</td>
<td>*(B) High</td>
<td></td>
</tr>
<tr>
<td>Informal Practice</td>
<td>Resource Management Strategy</td>
<td>*(B) Strategic</td>
<td></td>
</tr>
<tr>
<td>PERFORMANCE &amp; ITS MEASUREMENT</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Formal Practice</td>
<td>Organizational Performance Assessment Period</td>
<td>*(B) Short Term</td>
<td></td>
</tr>
<tr>
<td>Formal Practice</td>
<td>Employee Performance Assessment Period</td>
<td>*(B) Annual</td>
<td></td>
</tr>
<tr>
<td>Informal Practice</td>
<td>Employee Performance Criteria</td>
<td>*(B) Moving Towards Evaluation Against Measurable Objectives</td>
<td></td>
</tr>
</tbody>
</table>

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<table>
<thead>
<tr>
<th>Informal Practice</th>
<th>Performance Orientation</th>
<th>Power &amp; Authority</th>
</tr>
</thead>
<tbody>
<tr>
<td>Belief</td>
<td>Perception of Performance Measurability</td>
<td>*(B) All Performance is Measurable</td>
</tr>
<tr>
<td>Belief</td>
<td>Perceived Risk of Poor Performance</td>
<td>*(B) High for Staff</td>
</tr>
<tr>
<td>Belief</td>
<td>Definition of 'Measure'</td>
<td>*(D) Document</td>
</tr>
<tr>
<td>Belief</td>
<td>Acceptance of Performance Measurement</td>
<td>*(B) High</td>
</tr>
<tr>
<td>Formal Practice</td>
<td>Type of Power Exercised by Management</td>
<td>*(B) Ascribed power over staff</td>
</tr>
<tr>
<td></td>
<td>Locus of Mandate &amp; Agenda Control</td>
<td>*(B) The Organization's Stewards and Management</td>
</tr>
<tr>
<td>Informal Practice</td>
<td>Acceptance of Authority</td>
<td>*(B) Expected by employees</td>
</tr>
<tr>
<td>Informal Practice</td>
<td>Extent of Rewards/ Penalty Tools to Exercise Power</td>
<td>*(B) Many for staff</td>
</tr>
<tr>
<td>Belief</td>
<td>Expected Consequence for Resistance to Authority</td>
<td>*(B) Termination for staff</td>
</tr>
</tbody>
</table>

**PROFESSIONAL DEVELOPMENT**

| Formal Practice | Recruit Requirement for Industry Standard Professional Development | *(B) Limited for Staff |
| Formal Practice | Opportunity for On-the-Job Professional Development | *(B) Not Limited |
| Informal Practice | Recruit Induction/Mentoring Programs | *(B) Increasingly Provided for Volunteers |
| Informal Practice | Investment in Professional Development | *(B) Increasing |
| Belief           | Perceived Value for Professional Development | *(B) P.D. is Necessary |
| Belief           | Perceived Risk for Not Pursuing Professional Development | *(B) High for Staff |
| Belief           | Definition of 'Learning' | *(E) 'Learning' in the acquisition and application of knowledge |

**PROMOTIONS & REWARD SYSTEMS**

| Formal Practice | Upward Mobility Path | *(B) Not Prescribed for Staff |
| Formal Practice | Industry Standard Credentials | *(B) Not Required for Promotion of Staff Members |
| Formal Practice | Compensation and benefits for Management and Professionals | *(B) For Staff - Not Standardized, Performance-based, Confidential, Annual |
| Formal Practice | Board & Management Demographic | *(B) White Male Dominated Board |
| Informal Practice | Criteria determining Retention/ Promotion | *(B) For Staff - Performance |
| Informal Practice | Range and Type of Incentive Offerings | *(B) Wide Range of Financial and Non-Financial Perks for Staff and Volunteers |
| Belief           | Perception of Job Security | *(B) Low among Staff |
| Belief           | Valued Measures of Success | *(E) Intrinsic for Volunteers |

**RISK-TAKING**

| Formal Practice | Structure For Risk | *** (B) Risk-prone |
| Informal Practice | Orientation in Language and Behaviors | *(B) Risk-taking in nature |

**ROLES & RESPONSIBILITIES**

| Formal Practice | Affiliation Status of Management/Professionals | *(B) Staff Not unionized |
| Informal Practice | Clarity and Acceptance of Organizational role | *(B) High |
| Informal Practice | Board and Management Role Designations | *(B) Directors, President and CEO, V.P., Manager... |

**STAKEHOLDERS**

| Formal Practice | Title of Organizational Stewards | *(B) Board of 'Directors' |
| Formal Practice | Frequency of Stakeholder/Board Involvement | *(B) Members = Once/Year & Board Meetings = Arg. Once/ Month |
| Formal Practice | Authority to Run the Organization | *(E) Shared between Management and the Board |
| Formal Practice | Boardmember Selection Process | *(B) Selected by Sr. Officers of the Board & Ratified as a Slate by Members |
| Informal Practice | Stakeholder Differentiation | *(E) Does Not Rank Stakeholders |
| Belief           | Board Ideological Composition | *(B) Homogeneous |
LOE


**TABLE #5:**

**Conceptual Focus - Organizational Sub-Cultures**

Locus - Spoke of the Interorganizational Network

Juxtaposition & Classification of Education Characteristics and Exceptions

<table>
<thead>
<tr>
<th>Locus of Exceptions</th>
<th>Number of Differences in Formal Practices to General Culture</th>
<th>Number of Differences in Informal Practices to General Culture</th>
<th>Number of Differences in Beliefs to General Culture</th>
<th>Total Number of Differences to General Culture</th>
<th>Number of Differences That are Similar to Business</th>
</tr>
</thead>
<tbody>
<tr>
<td>(B) Boards</td>
<td>9</td>
<td>9</td>
<td>4</td>
<td>22</td>
<td>22</td>
</tr>
<tr>
<td>(GM) Board Management</td>
<td>1</td>
<td>6</td>
<td>1</td>
<td>8</td>
<td>8</td>
</tr>
<tr>
<td>(GM) Board &amp; School Management</td>
<td>3</td>
<td>2</td>
<td>1</td>
<td>6</td>
<td>5</td>
</tr>
<tr>
<td>(P) Principals</td>
<td>2</td>
<td>0</td>
<td>0</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>(D) Directors</td>
<td>1</td>
<td>1</td>
<td>0</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>(U) Some Teachers &amp; Federation Officials</td>
<td>0</td>
<td>0</td>
<td>3</td>
<td>3</td>
<td>0</td>
</tr>
<tr>
<td><strong>Totals</strong></td>
<td><strong>19</strong></td>
<td><strong>21</strong></td>
<td><strong>9</strong></td>
<td><strong>48</strong></td>
<td><strong>43</strong></td>
</tr>
</tbody>
</table>

**Details:**

<table>
<thead>
<tr>
<th>Cultural Form</th>
<th>Issue</th>
<th>Education Characteristic</th>
<th>Exception &amp; Classification</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Competition</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Formal Practice</td>
<td>Opportunity for Competition</td>
<td>Restricted</td>
<td>*(B) - Boards demonstrate competitive behaviors towards each other and Boards suspend competitive behaviors in public for a common cause</td>
</tr>
<tr>
<td>Informal Practice</td>
<td>Orientation in Language and Behaviors</td>
<td>Collaborative</td>
<td>*(F) - By legislative Act Principals can exercise individual decision authority</td>
</tr>
<tr>
<td><strong>Decision-Making</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Formal Practice</td>
<td>Decision Authority</td>
<td>Shared</td>
<td>*(B) - Some operating decisions at Boards are focused to deliver action on an objective target</td>
</tr>
<tr>
<td>Informal Practice</td>
<td>Decision-Making Goals</td>
<td>Consensus on Subjective Target</td>
<td>*(B) - At Boards, technological, physical and union barriers to collaboration do not</td>
</tr>
<tr>
<td>Belief</td>
<td>Resistance to Decision Authority</td>
<td>Will Not Be Penalized</td>
<td>*(BGM) - Resistance to Authority will result in penalty for non-unionized people at Boards</td>
</tr>
<tr>
<td><strong>External &amp; Internal Relationships</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Formal Practice</td>
<td>Barriers to Internal/External Collaboration</td>
<td>-Absence of Technology -Physical Isolation</td>
<td>*(B) - At Boards, technological, physical and union barriers to collaboration do not</td>
</tr>
</tbody>
</table>
| Informal Practice | Belief | Rationale for Orientation to Collaboration | Few | (B) - Boards believe that external collaboration with business has become necessary  
| Formal Practice | Rationale for Business-Education Partnerships | Mutually Beneficial | (U) - Some teachers and federations suspect that business seeks to exploit Education as a market and forecast detrimental to education from partnerships with business  
| Informal Practice | Degree of Financial Orientation in Language & Behaviors | Low | (BM) - Boards are demonstrating a higher degree of financial orientation  
| Informal Practice | Resource Management Strategy | Across-the-Board | (BM) - Board-generated revenues are being strategically managed  

### FINANCIAL MATTERS

| Formal Practice | Revenue Generation Responsibility | Government | (BM) - Board management is informally pursuing revenue generation to compensate for budget shortfalls from government  
| Formal Practice | Financial Period Focus | Long Term | (BM) - Board management is informally exercising a shorter term focus on financial matters  
| Informal Practice | Degree of Financial Orientation in Language & Behaviors | Low | (BM) - Boards are demonstrating a higher degree of financial orientation  
| Informal Practice | Resource Management Strategy | Across-the-Board | (BM) - Board-generated revenues are being strategically managed  

### PERFORMANCE & ITS MEASUREMENT

| Formal Practice | Employee Performance Assessment Period | Every Few Years | (B) - Annual for Board people  
| Informal Practice | Employees Performance Criteria | Subjective Evaluation | (B) - Evaluation against measurable objectives at Boards  
| Informal Practice | Performance Orientation | Process Focus | (B) - Boards are recognizing a societal demand for education to demonstrate a greater focus on outcomes  
| Belief | Perception of Performance Measurability | Performance is difficult to fairly measure | (B) - At Boards performance is measurable  
| Belief | Acceptance of Performance Measurement | Low | (B) - Higher at Boards  

### POWER & AUTHORITY

| Formal Practice | Type of Power Exercised by Management | Achieved | (P) - By legislative Act Principals exercise ascribed power  

### PROFESSIONAL DEVELOPMENT

| Formal Practice | Opportunity for On-the-Job Professional Development | Limited | (B) - Not limited for Board people  

### PROMOTIONS & REWARD SYSTEMS

| Formal Practice | Compensation and benefits for Management and Professionals | - Standardized - Seniority-based - Published - Contractual Period | (D) - Directors' compensation is: - Not Standardized - Performance-based - Confidential - Annual  
| Formal Practice | Board & Management Demographic | - White Male/Female Trustees - White Male Dominated Mgmt. | (GM) - Recent government equity requirements have prompted an increase in promotion of women into management  
| Informal Practice | Criteria determining Retention/ Promotion | Seniority | (GM) - Performance is the criteria for promotion into and through management  
| Belief | Valued Measures of Success | Intrinsic | (GM) - For those who seek it, promotion signals success  

### ROLES & RESPONSIBILITIES

| Formal Practice | Organizational Roles | Social | (GM) - Economic issues are becoming a greater concern for management  
| Formal Practice | Affiliation Status of Management/Professionals | Unionized | (BM) - Directors and Superintendents are not unionized  
| Informal Practice | Board and Management Role Designations | Trustees, Director, Superintendent, Principal, Vice Principal | (D) - At some Boards, Directors assume the title: "CEO"  
| Informal Practice | Management Style | Is Changing from 'Autocratic Controller' to 'Democratic Facilitator' | "- Some Principals and Teachers remain 'Autocratic Controllers'  
| Belief | Perception About Affiliation Status of Professionals | Teacher Federations rank Above Unions | (U) - The dissatisfied and militant consider the Federation to be a union  

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<table>
<thead>
<tr>
<th>Belief</th>
<th>Perception of Business Participation in Public Education</th>
<th>Business has a role in public education, and the education role requires business assistance</th>
<th>(U)-There are educators who believe business has no role in education</th>
</tr>
</thead>
</table>

**STAKEHOLDERS**

<table>
<thead>
<tr>
<th>Informal Practice</th>
<th>Stakeholder Contact Responsibility</th>
<th>Board Senior Management</th>
<th>* - By formal practice of legislation, schools have recently been required to establish councils to facilitate stakeholder contact</th>
</tr>
</thead>
<tbody>
<tr>
<td>Informal Practice</td>
<td>Stakeholder Differentiation</td>
<td>-Does Not Rank Stakeholders</td>
<td>(B) - Schoolboards appear to rank the Ministry and now business above other stakeholders</td>
</tr>
</tbody>
</table>

**TIME**

<table>
<thead>
<tr>
<th>Formal Practice</th>
<th>Formal On-The-Job Time</th>
<th>Shorter than Business</th>
<th>(B) - Longer than Education at Boards</th>
</tr>
</thead>
<tbody>
<tr>
<td>Formal Practice</td>
<td>Demographic Temporal Orientation</td>
<td>Children</td>
<td>(B) - Boards are oriented to Adults</td>
</tr>
<tr>
<td>Informal Practice</td>
<td>Role &amp; Place Turnover</td>
<td>Low</td>
<td>* - high place turnover for Principals, VP's, and lower level Board people</td>
</tr>
<tr>
<td>Informal Practice</td>
<td>Concern for Time Management at Meetings</td>
<td>Low</td>
<td>(B) - higher among Board people</td>
</tr>
<tr>
<td>Informal Practice</td>
<td>Investment of Personal Time On-The-Job</td>
<td>Discretionary</td>
<td>(GM) - Expected for Board people and those seeking promotion</td>
</tr>
</tbody>
</table>

**TRANSFORMATION & CHANGE**

<table>
<thead>
<tr>
<th>Informal Practice</th>
<th>Locus of Recent Organizational Change</th>
<th>Processes</th>
<th>(B)- Boards have also made structural changes that are outside the traditional organizational boundary of education</th>
</tr>
</thead>
</table>

**VERBAL & NON-VERBAL COMMUNICATION**

<table>
<thead>
<tr>
<th>Formal Practice</th>
<th>Workspace Name</th>
<th>‘My School’, ‘My Class’</th>
<th>(B) - Board of Education names: ‘The Board’, ‘The office’</th>
</tr>
</thead>
<tbody>
<tr>
<td>Formal Practice</td>
<td>Presence of Technology</td>
<td>Limited</td>
<td>(B) - Less limited at Boards</td>
</tr>
<tr>
<td>Formal Practice</td>
<td>Access to Information</td>
<td>Indirect</td>
<td>(B) - Boards have access to more direct information than schools because of the opportunity to network</td>
</tr>
<tr>
<td>Formal Practice</td>
<td>Role Rank Visibility</td>
<td>Not Apparent in classroom space features</td>
<td>(B) - Apparent in office space features at Boards</td>
</tr>
<tr>
<td>Informal Practice</td>
<td>Dress</td>
<td>Informal, Bright, Unstructured</td>
<td>(BM) - At Boards among senior officers dress is formal, subdued and structured</td>
</tr>
<tr>
<td>Informal Practice</td>
<td>Nature of Speech Patterns, Language, Jargon</td>
<td>Identifiably Pedagogical</td>
<td>(BM) - At Boards, on matters of operation some business terms are used</td>
</tr>
<tr>
<td>Informal Practice</td>
<td>Language Orientation</td>
<td>People</td>
<td>(B) - Higher degree of fact orientation in Board people’s language about operational issues</td>
</tr>
</tbody>
</table>
## TABLE #6
**Conceptual Focus - Organizational Sub-Cultures**
Locus - Spoke of the Interorganizational Network
Juxtaposition & Classification of Business Characteristics and Exceptions

### Legend & Summary:

<table>
<thead>
<tr>
<th>LOCUS OF EXCEPTIONS</th>
<th>NUMBER OF DIFFERENCES IN FORMAL PRACTICES TO GENERAL CULTURE</th>
<th>NUMBER OF DIFFERENCES IN INFORMAL PRACTICES TO GENERAL CULTURE</th>
<th>NUMBER OF DIFFERENCES IN BELIEFS TO GENERAL CULTURE</th>
<th>TOTAL NUMBER OF DIFFERENCES TO GENERAL CULTURE</th>
<th>NUMBER OF DIFFERENCES THAT ARE SIMILAR TO EDUCATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>(RB) Regulated Businesses</td>
<td>2</td>
<td>0</td>
<td>0</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>(SB) Small Business</td>
<td>2</td>
<td>1</td>
<td>0</td>
<td>3</td>
<td>2</td>
</tr>
<tr>
<td>(SP) Some Professionals</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>(SM) Some Senior Management</td>
<td>3</td>
<td>1</td>
<td>2</td>
<td>6</td>
<td>6</td>
</tr>
<tr>
<td>Totals</td>
<td>8</td>
<td>2</td>
<td>2</td>
<td>12</td>
<td>11</td>
</tr>
</tbody>
</table>

### Details:

<table>
<thead>
<tr>
<th>CULTURAL FORM</th>
<th>ISSUE</th>
<th>BUSINESS CHARACTERISTICS</th>
<th>EXCEPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>COMPETITION</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Formal Practice</td>
<td>Opportunity for Competition</td>
<td>Generally Unrestricted</td>
<td>*</td>
</tr>
<tr>
<td>Informal Practice</td>
<td>Orientation in Language and Behaviors</td>
<td>Competitive</td>
<td>*</td>
</tr>
<tr>
<td>Belief</td>
<td>Definition of &quot;Competitors&quot;</td>
<td>Anyone Producing Similar/Substitute Product/Service</td>
<td>*</td>
</tr>
<tr>
<td>Belief</td>
<td>Rationale for Competitive Orientation</td>
<td>Principles of Economics Necessitate Competitiveness</td>
<td>*</td>
</tr>
</tbody>
</table>

| DECISION-MAKING |       |                          |           |
| Formal Practice | Decision Authority | Individual | * |
| Informal Practice | Decision-Making Rate | Fast | * |
| Informal Practice | Decision-Making Goals | Action on Objective Target | * |
| Informal Practice | Decision Compliance | Immediately Noticed | * |
| Belief | Resistance to Decision Authority | Will Be Penalized | * |
| Belief | Decision-Making Orientation Rationale | The Need to Deliver Outcomes in a Competitive Environment Necessitates Fast Decision-Making | * |

| EXTERNAL & INTERNAL RELATIONSHIPS |       |                          |           |
| Formal Practice | Organizational Connection to External Environment | Direct | * |
| Formal Practice | Barriers to Internal External Collaboration | None Apparent | * |
| Informal Practice | Employee Experience Outside Organization/Field | Many | * |
| Informal Practice | Extent of Inter-Organizational Collaboration | Extensive and Growing | * |
| Belief | Rationale for Orientation to Collaboration | Collaboration is Necessary When Required | * |
| Belief | Perceived Relationship to External Environment | Connected With | * |
| Belief | Rationale for Business-Education Partnerships | Mutually Beneficial | * |

<p>| FINANCIAL MATTERS |       |                          |           |
| Formal Practice | Revenue Generation | The Organization Itself | * |</p>
<table>
<thead>
<tr>
<th>Formal Practice</th>
<th>Responsibility</th>
<th>Performance &amp; ITS Measurement</th>
<th>POWER &amp; AUTHORITY</th>
<th>PROFESSIONAL DEVELOPMENT</th>
<th>PROMOTIONS &amp; REWARD SYSTEMS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Financial Period Focus</td>
<td>Short Term</td>
<td>Financial</td>
<td>Ascribed</td>
<td>Limited</td>
<td>Not Prescribed</td>
</tr>
<tr>
<td>Organizational Performance Criteria</td>
<td>Financial</td>
<td>Clear and Acceptable</td>
<td>Type of Power Exercised by Management</td>
<td>Not Limited</td>
<td>Industry Standard Credentials</td>
</tr>
<tr>
<td>Degree of Financial Orientation in Language &amp; Behaviors</td>
<td>High</td>
<td>Evaluation Against Measurable Objectives</td>
<td>Locus of Mandate &amp; Agenda Control</td>
<td>The Organization</td>
<td>Not Required for Promotion</td>
</tr>
<tr>
<td>Resource Management Strategy</td>
<td>Strategic</td>
<td>Performance Focus</td>
<td>Acceptance of Authority</td>
<td>Expected</td>
<td>Opportunity for On-the-Job Professional Development</td>
</tr>
<tr>
<td>Definition of 'Financial Accountability'</td>
<td>Make Money and Accept Penalty if Not</td>
<td>Perceived Risk of Poor Performance</td>
<td>Perceived Risk of Poor Performance</td>
<td>High</td>
<td></td>
</tr>
<tr>
<td>Perception of Performance Measurability</td>
<td>All performance is Measurable</td>
<td>High</td>
<td>Extent of Reward/Penalty Tools to Exercise Power</td>
<td>Many</td>
<td></td>
</tr>
<tr>
<td>Perceived Risk of Poor Performance</td>
<td>High</td>
<td>Resistance to Authority</td>
<td>Expected Consequence for Resistance to Authority</td>
<td>Termination</td>
<td></td>
</tr>
<tr>
<td>Definition of 'Measure'</td>
<td>Document</td>
<td>Preferred Locus of Authority</td>
<td>For Corporate H.Q. - Centralized</td>
<td>For Branch Plants - Local</td>
<td></td>
</tr>
<tr>
<td>Acceptance of Performance Measurement</td>
<td>High</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

(SP) - Certain Tradespeople and Professionals require industry certification. (SM) - MBA designation is informally valued by senior management.

(SB) - Limited for small business due to lack of resources.

(SM) - The MBA designation is informally recognized by senior management.

(SB) - Increasing among small businesses and high tech firms.

(SM) - Recent regulations require public.
<table>
<thead>
<tr>
<th>roups</th>
<th>Roles &amp; Responsibilities</th>
<th>Stakeholders</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Formal Practice</strong></td>
<td><strong>Management and Professionals</strong>&lt;br&gt;-Performance-based&lt;br&gt;-Confidential&lt;br&gt;-Annual</td>
<td><strong>Disclosure of Officer Compensation</strong>&lt;br&gt;(R) - For government regulated businesses, equity practices required</td>
<td><strong>Formal Practice</strong></td>
</tr>
<tr>
<td>Practice</td>
<td>Formal On-The-Job Time</td>
<td>Demographic Temporal Orientation</td>
<td>Role &amp; Place Turnover</td>
</tr>
<tr>
<td>-----------------------</td>
<td>------------------------</td>
<td>----------------------------------</td>
<td>-----------------------</td>
</tr>
<tr>
<td>Formal Practice</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Informal Practice</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**TRANSFORMATION & CHANGE**

<table>
<thead>
<tr>
<th>Practice</th>
<th>Structure for Change</th>
<th>Becoming More Flexible</th>
</tr>
</thead>
<tbody>
<tr>
<td>Formal Practice</td>
<td>Locus of Authority to Effect Structural Transformation</td>
<td>The Organization</td>
</tr>
<tr>
<td>Informal Practice</td>
<td>Locus of Recent Organizational Change</td>
<td>Structure and Processes</td>
</tr>
<tr>
<td>Informal Practice</td>
<td>Rate of Change</td>
<td>Fast</td>
</tr>
<tr>
<td>Belief</td>
<td>Perception of the Change Process</td>
<td>Change is Difficult without the Threat of Termination</td>
</tr>
<tr>
<td>Belief</td>
<td>Attitude to Change</td>
<td>There is a High Risk For Not Changing</td>
</tr>
</tbody>
</table>

**VERBAL & NON-VERBAL COMMUNICATION**

<table>
<thead>
<tr>
<th>Practice</th>
<th>Workspace Name</th>
<th>'The/ Our Company', 'The Office'</th>
</tr>
</thead>
<tbody>
<tr>
<td>Formal Practice</td>
<td>Workspace Physical Structure</td>
<td>'Office' Structure Designed, Configured and Decorated for Adult Individuals</td>
</tr>
<tr>
<td>Formal Practice</td>
<td>Presence of Technology</td>
<td>Pervasive</td>
</tr>
<tr>
<td>Formal Practice</td>
<td>Access to Information</td>
<td>Direct</td>
</tr>
<tr>
<td>Formal Practice</td>
<td>Role Rank Visibility</td>
<td>Apparent in office space features space</td>
</tr>
<tr>
<td>Informal Practice</td>
<td>Dress</td>
<td>Formal, Subdued, Structured</td>
</tr>
<tr>
<td>Informal Practice</td>
<td>Jargon For Administrative Headquarters</td>
<td>'Ivory Tower'</td>
</tr>
<tr>
<td>Informal Practice</td>
<td>Nature of Speech Patterns, Language, Jargon</td>
<td>Identifiably Business-Oriented</td>
</tr>
<tr>
<td>Informal Practice</td>
<td>Language Orientation</td>
<td>Facts</td>
</tr>
<tr>
<td>Informal Practice</td>
<td>Approach to Speaking</td>
<td>Reserved</td>
</tr>
<tr>
<td>Informal Practice</td>
<td>Degree of Explanation in Speech</td>
<td>Low</td>
</tr>
<tr>
<td>Informal Practice</td>
<td>Tolerance for Confrontation</td>
<td>Relatively High</td>
</tr>
<tr>
<td>Formal Practice</td>
<td>Patience Level in Communication Reception</td>
<td>Low</td>
</tr>
<tr>
<td>Informal Practice</td>
<td>Communication Response Rate</td>
<td>Fast</td>
</tr>
<tr>
<td>Belief</td>
<td>Primary Qualities Valued in Communications</td>
<td>Brevity/ Usefulness</td>
</tr>
<tr>
<td>Belief</td>
<td>About Organizational Language</td>
<td>Each Organization has its own Particular Words and Language Patterns</td>
</tr>
</tbody>
</table>

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### TABLE #7

**Conceptual Focus - Trans-Organizational Sub-Culture**

**Loci - Spokes of the Interorganizational Network**

**Juxtaposition & Classification of Similarities between Education Culture or Sub-Culture and Business**

<table>
<thead>
<tr>
<th>Legend &amp; Summary:</th>
<th>NUMBER OF SIMILARITIES IN FORMAL PRACTICES</th>
<th>NUMBER OF SIMILARITIES IN INFORMAL PRACTICES</th>
<th>NUMBER OF SIMILARITIES IN BELIEFS</th>
<th>TOTAL NUMBER OF SIMILARITIES</th>
</tr>
</thead>
<tbody>
<tr>
<td>(B) at Boards</td>
<td>11</td>
<td>13</td>
<td>5</td>
<td>29</td>
</tr>
<tr>
<td>(SM) among Senior Management</td>
<td>2</td>
<td>3</td>
<td>0</td>
<td>5</td>
</tr>
<tr>
<td>(M) among Education Management</td>
<td>6</td>
<td>4</td>
<td>7</td>
<td>17</td>
</tr>
<tr>
<td>(BM) among Board people and Principals</td>
<td>1</td>
<td></td>
<td></td>
<td>1</td>
</tr>
<tr>
<td>(U) among Unionized Employees</td>
<td></td>
<td>1</td>
<td></td>
<td>1</td>
</tr>
<tr>
<td>(S) at Schools</td>
<td>1</td>
<td></td>
<td></td>
<td>1</td>
</tr>
<tr>
<td>(NR) among New Recruits</td>
<td></td>
<td>1</td>
<td></td>
<td>1</td>
</tr>
<tr>
<td>(G) in Education locations outside Ontario</td>
<td>1</td>
<td></td>
<td></td>
<td>1</td>
</tr>
<tr>
<td><strong>Totals</strong></td>
<td><strong>21</strong></td>
<td><strong>22</strong></td>
<td><strong>13</strong></td>
<td><strong>56</strong></td>
</tr>
</tbody>
</table>

#### Details:

<table>
<thead>
<tr>
<th>CULTURAL FORM</th>
<th>BUSINESS CHARACTERISTIC</th>
<th>SIMILAR CHARACTERISTIC IN EDUCATION CULTURAL OR SUB-CULTURE &amp; CLASSIFICATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>COMPETITION</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Formal Practice</td>
<td>Generally Unrestricted Opportunity for Competition</td>
<td>O - Outside Ontario barriers to competition are diminishing</td>
</tr>
<tr>
<td>Informal Practice</td>
<td>Competitive Orientation in Language and Behaviors</td>
<td>B - Boards demonstrate competitive behaviors towards each other</td>
</tr>
<tr>
<td></td>
<td></td>
<td>B - Boards suspend competitive behaviors in public for a common cause</td>
</tr>
<tr>
<td>DECISION-MAKING</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Formal Practice</td>
<td>Individual Decision Authority</td>
<td>M - By legislative Act Principals can exercise individual decision authority</td>
</tr>
<tr>
<td>Informal Practice</td>
<td>Decision Goal - Action on Objective Target</td>
<td>B - Some operating decisions at Boards are focused to deliver action on an objective target</td>
</tr>
<tr>
<td>Belief</td>
<td>Resistance to Decision-Authority Will Be Penalized</td>
<td>B - Resistance to Authority will result in penalty for non-unionized people at Boards</td>
</tr>
<tr>
<td>EXTERNAL &amp; INTERNAL RELATIONSHIPS</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Formal Practice</td>
<td>No Apparent Barriers to Internal/External Collaboration</td>
<td>B - At Boards, technological, physical and union barriers to collaboration do not exist</td>
</tr>
<tr>
<td>Informal Practice</td>
<td>Many Employees have Experience Outside Organization/Field</td>
<td>NR - Many new recruits now arrive with experience outside education</td>
</tr>
<tr>
<td>Belief</td>
<td>Collaboration is Necessary When Required</td>
<td>B - Boards believe that external collaboration with business has become necessary</td>
</tr>
<tr>
<td>Belief</td>
<td>Perception of Being Connected With Environment</td>
<td>B - Boards perceive an increase in their environmental connectedness</td>
</tr>
<tr>
<td>Belief</td>
<td>Partnerships are Mutually Beneficial</td>
<td>M - Mutually Beneficial</td>
</tr>
<tr>
<td>FINANCIAL MATTERS</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Formal Practice</td>
<td>Revenue Generation is the Responsibility of the Organization Itself</td>
<td>B - Board management is informally pursuing revenue generation to compensate for budget shortfalls from government</td>
</tr>
<tr>
<td>Formal Practice</td>
<td>Financial Period Focus is Short Term</td>
<td>B - Board management is informally exercising a shorter term focus on financial matters</td>
</tr>
<tr>
<td>Informal Practice</td>
<td>High Degree of Financial Orientation in Language &amp;</td>
<td>B - Board management are demonstrating a higher degree of financial orientation</td>
</tr>
<tr>
<td>Informal Practice</td>
<td>Strategic Management of Resources</td>
<td>B - Board-generated revenues are being strategically managed</td>
</tr>
<tr>
<td>------------------</td>
<td>----------------------------------</td>
<td>----------------------------------------------------------</td>
</tr>
</tbody>
</table>

**PERFORMANCE & ITS MEASUREMENT**

| Formal Practice | Annual Employee Performance Assessment Period | B - Annual for Board people |
| Informal Practice | Employee Performance Criteria is Evaluation Against Measurable Objectives | B - Evaluation Against Measurable Objectives at Boards |
| Informal Practice | Performance Focus is on Outcomes | B - Boards are recognizing a societal demand for education to demonstrate a greater focus on outcomes |
| Belief | All performance is Measurable | B - At Boards performance is measurable |
| Belief | Acceptance of Performance Measurement is High | B - Higher at Boards |

**POWER & AUTHORITY**

| Formal Practice | Ascribed Power is Exercised by Management | M - By legislative Act Principals exercise ascribed power |
| Belief | Authority Preference: For Corporate H.Q. - Centralized, For Branch Plants - Local | M - For Boards - Centralized, For Schools - Local |

**PROFESSIONAL DEVELOPMENT**

| Formal Practice | Opportunity for On-the-Job P.M. is Not Limited | B - Not limited for Board people |

**PROMOTIONS & REWARD SYSTEMS**

| Formal Practice | Opportunity for Upward Mobility is Decreasing due to Downsizing | M - Decreasing due to Downsizing |
| Formal Practice | Management is White Male Dominated | M - White Male Dominated Mgmt. |
| Informal Practice | Criteria Determining Retention/Promotion is Performance | M - Performance is the criteria for promotion into and through mgmt. |
| Belief | Extrinsic Rewards are Valued as Measures of Success | M - For those who seek it, promotion signals success |

**ROLES & RESPONSIBILITIES**

<p>| Formal Practice | Organizational Role is Economic | M - Economic issues are becoming a greater concern for management |
| Formal Practice | Management and Professionals are Not unionized | SM - Directors and Superintendents are not unionized |
| Informal Practice | Board &amp; Management Titles include: Directors, President, CEO, COO, CFO, V.P., Mgr. Supervisor... | SM - At some Boards, Directors assume the title: “CEO” |
| Informal Practice | Management Style Has Changed from “Autocratic Controller” to “Democratic Facilitator” | M - Is Changing from “Autocratic Controller” to “Democratic Facilitator” |
| Informal Practice | locus of Role Conflict is between Senior and Middle Management | M - Between Board Officials and Principals |
| Belief | Perception of Skill/Function Similarity Among “administrators”, “managers” | M - Among “administrators”, “managers” |
| Belief | Management is Changing from “knowledge keeper” to “knowledge facilitator” due to information explosion | M - Changing from “knowledge keeper” to “knowledge facilitator” due to information explosion |
| Belief | Professionals rank above Unions which are for | U - Teacher Federations rank Above Unions |</p>
<table>
<thead>
<tr>
<th>STAKEHOLDERS</th>
<th>TRADESPERSON</th>
<th>TRADESPERSON</th>
</tr>
</thead>
<tbody>
<tr>
<td>Belief</td>
<td>Business has a role in public education, and the education role requires business assistance</td>
<td>M - Business has a role in public education, and the education role requires business assistance</td>
</tr>
<tr>
<td>Informal Practice</td>
<td>Senior Management has Shareholder Contact Responsibility</td>
<td>SM - Board Senior Management</td>
</tr>
<tr>
<td>Informal Practice</td>
<td>Differentiates Stakeholders by Rank</td>
<td>B - Schoolboards appear to rank the Ministry and new business above other stakeholders</td>
</tr>
<tr>
<td>TIME</td>
<td>Formal Practice</td>
<td>Formal On-the-Job Time is Longer than Education</td>
</tr>
<tr>
<td></td>
<td>Informal Practice</td>
<td>Role &amp; Place Turnover is High</td>
</tr>
<tr>
<td></td>
<td>Informal Practice</td>
<td>Concern for Time Management is High</td>
</tr>
<tr>
<td></td>
<td>Informal Practice</td>
<td>Investment of personal Time On-the-Job is Expected</td>
</tr>
<tr>
<td>TRANSFORMATION &amp; CHANGE</td>
<td>Informal Practice</td>
<td>Locus of Recent Organizational Change involves Structure and Processes</td>
</tr>
<tr>
<td></td>
<td>Formal Practice</td>
<td>Workspace Name is: 'The/Our Company', 'The Office'</td>
</tr>
<tr>
<td></td>
<td>Formal Practice</td>
<td>Workspace is Structured to be an 'Office', Designed, Configured and Decorated for Adult Individuals</td>
</tr>
<tr>
<td></td>
<td>Informal Practice</td>
<td>Technology is Pervasive</td>
</tr>
<tr>
<td></td>
<td>Formal Practice</td>
<td>Access to Information is Direct</td>
</tr>
<tr>
<td></td>
<td>Informal Practice</td>
<td>Role Rank is Apparent in office space features space</td>
</tr>
<tr>
<td></td>
<td>Informal Practice</td>
<td>Dress is Formal, Subdued, Structured</td>
</tr>
<tr>
<td></td>
<td>Formal Practice</td>
<td>Administrative Headquarters is called: the 'Ivory Tower'</td>
</tr>
<tr>
<td></td>
<td>Informal Practice</td>
<td>Speech Patterns, Language and Jargon is Identifiable Business-Oriented</td>
</tr>
<tr>
<td></td>
<td>Informal Practice</td>
<td>Facts Orientation in Language</td>
</tr>
<tr>
<td></td>
<td>Belief</td>
<td>Each Organization has its own Particular Words and Language Patterns</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>VERBAL &amp; NON-VERBAL COMMUNICATION</th>
<th>TRADESPERSON</th>
<th>TRADESPERSON</th>
</tr>
</thead>
<tbody>
<tr>
<td>Formal Practice</td>
<td>Board of Education names: 'The Board', 'The office'</td>
<td></td>
</tr>
<tr>
<td>Formal Practice</td>
<td>At Boards and in parts of schools 'Office' Structure Designed, Configured and Decorated for Adult Individuals</td>
<td></td>
</tr>
<tr>
<td>Formal Practice</td>
<td>At Boards have access to more direct information than schools because of the opportunity to network</td>
<td></td>
</tr>
<tr>
<td>Formal Practice</td>
<td>Apparent in office space features at Boards</td>
<td></td>
</tr>
<tr>
<td>Informal Practice</td>
<td>At Boards among senior officers dress is formal, subdued and structured</td>
<td></td>
</tr>
<tr>
<td>Informal Practice</td>
<td>At Boards, on matters of operation some business terms are used</td>
<td></td>
</tr>
<tr>
<td>Informal Practice</td>
<td>Higher degree of fact orientation in Board people's language about operational issues</td>
<td></td>
</tr>
<tr>
<td>Belief</td>
<td>Each Organization has its own Particular Words and Language Patterns</td>
<td></td>
</tr>
</tbody>
</table>
TABLE #8
Conceptual Focus - Societal Culture
Loci - Spokes of the Interorganizational Network
Juxtaposition & Classification of Selected Characteristics from Business and Education that Reflect Change

<table>
<thead>
<tr>
<th>CLASSIFICATION OF CHANGES</th>
<th>NUMBER IN BUSINESS</th>
<th>NUMBER IN EDUCATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>(E) Changes Relating to an Economic Shift</td>
<td>4</td>
<td>11</td>
</tr>
<tr>
<td>(T) Changes Relating to a Technological Shift</td>
<td>3</td>
<td>2</td>
</tr>
<tr>
<td>(V) Changed Relating to a Shift in Societal Values</td>
<td>4</td>
<td>2</td>
</tr>
<tr>
<td>Totals</td>
<td>11</td>
<td>15</td>
</tr>
</tbody>
</table>

**Legend & Summary:**

<table>
<thead>
<tr>
<th>ISSUE</th>
<th>BUSINESS CHARACTERISTICS REFLECTING CHANGE &amp; CLASSIFICATION</th>
<th>EDUCATION CHARACTERISTICS REFLECTING CHANGE &amp; CLASSIFICATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>COMPETITION</td>
<td>Opportunity for Competition</td>
<td>E - Becoming less restricted for Big Business</td>
</tr>
<tr>
<td>EXTERNAL &amp; INTERNAL RELATIONSHIPS</td>
<td>Barriers to Internal/External Collaboration</td>
<td>T - Increase in Technology</td>
</tr>
<tr>
<td></td>
<td>Extent of Inter-Organizational Collaboration</td>
<td>E - The number of collaborations is growing</td>
</tr>
<tr>
<td>FINANCIAL MATTERS</td>
<td>Revenue Generation Responsibility</td>
<td>E - Being taken on by Boards</td>
</tr>
<tr>
<td></td>
<td>Financial Period Focus</td>
<td>E - Shortening for Boards</td>
</tr>
<tr>
<td></td>
<td>Degree of Financial Orientation in Language &amp; Behaviors</td>
<td>E - Increasing for Boards</td>
</tr>
<tr>
<td></td>
<td>Resource Management Strategy</td>
<td>E - Being more strategic at Boards through amalgamated entities</td>
</tr>
<tr>
<td>PERFORMANCE &amp; ITS MEASUREMENT</td>
<td>Performance Orientation</td>
<td>V - A greater focus on societal contribution is being recognized</td>
</tr>
<tr>
<td>PROFESSIONAL DEVELOPMENT</td>
<td>Investment in Professional Development</td>
<td>T - Increasing</td>
</tr>
<tr>
<td>PROMOTIONS &amp; REWARD SYSTEMS</td>
<td>Opportunity for Upward Mobility</td>
<td>E - Decreasing among Big Business</td>
</tr>
<tr>
<td></td>
<td>Board &amp; Management Demographic</td>
<td>V - Is espoused to become more equitable</td>
</tr>
<tr>
<td>ROLES &amp; RESPONSIBILITIES</td>
<td>Organizational Roles</td>
<td>E - Boards are more cogniscent of economic role</td>
</tr>
<tr>
<td>STAKEHOLDERS</td>
<td>Stakeholder Contact Responsibility</td>
<td>V - Changing from Autocratic to Democratic</td>
</tr>
<tr>
<td></td>
<td>Management Style</td>
<td>V - More stakeholder recognition is espoused</td>
</tr>
<tr>
<td></td>
<td>Perception Towards Diverse Interests/Opinions</td>
<td>V - Structures have been downsized</td>
</tr>
<tr>
<td></td>
<td>Locus of Recent Organizational Change</td>
<td>T - Processes have been changed to accommodate new technologies</td>
</tr>
<tr>
<td></td>
<td>E - Structures have been downsized</td>
<td>E - Board structures have been downsized</td>
</tr>
<tr>
<td></td>
<td>T - There is increased use of technology in Board processes</td>
<td>T - There is increased use of technology in Board processes</td>
</tr>
<tr>
<td></td>
<td>E - Amalgamated entities have been established outside traditional boundaries to manage non-public funds</td>
<td>E - Amalgamated entities have been established outside traditional boundaries to manage non-public funds</td>
</tr>
</tbody>
</table>
### TABLE #9

**Conceptual Focus - Cultural Mosaic**

Loci - Hub & Spokes of the Interorganizational Network

Juxtaposition of All Characteristics & Exceptions

<table>
<thead>
<tr>
<th>FORM</th>
<th>COMPETITION</th>
<th>TLP</th>
<th>BUSINESS</th>
<th>EDUCATION</th>
<th>EXCEPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Formal</td>
<td>Opportunity for Competition</td>
<td>-Restricted for competitors to TLP</td>
<td>Generally Unrestricted</td>
<td>Restricted</td>
<td>E - Education is becoming less restricted outside Ontario</td>
</tr>
<tr>
<td>Informal</td>
<td>Orientation in Language and Behaviors</td>
<td>-Externally Competitive Internally Collaborative</td>
<td>Competitive</td>
<td>Collaborative</td>
<td>B - Businesses suspend competitive behaviors in public for common cause E - Boards demonstrate competitive behaviors towards each other E - Boards suspend competitive behaviors in public for a common cause</td>
</tr>
<tr>
<td>Belief</td>
<td>Definition of 'Competitors'</td>
<td>Anyone Seeking Charitable Funding</td>
<td>Anyone Producing Similar/Substitute Product/Service</td>
<td>Only Those Similarly Mandated/Funded by Government</td>
<td>*</td>
</tr>
<tr>
<td>Belief</td>
<td>Rationale for Competitive Orientation</td>
<td>Principle of Synergy Requires Collaboration</td>
<td>Principles of Economics Competitiveness</td>
<td>Principles of Psychology and Sociology Encourage Collaboration</td>
<td>*</td>
</tr>
</tbody>
</table>

**BUSINESS NORM**

- Public Educators don’t seem to recognize that there are competitive alternatives to public education
- By ignoring and discouraging competitive behaviors Educators demonstrate a blindness to economic reality
- Public Educators think their position is immune from competition
- Competition in Education is going to increase
- If school systems can’t compete, new systems will replace them

**EDUCATION NORM**

- If Education were to be as competitive as Business, private schools would serve the elite, underfunded public schools would serve the disadvantaged, and society would be polarized

### FORM

#### DECISION-MAKING

<table>
<thead>
<tr>
<th>FORM</th>
<th>TLP NORM</th>
<th>BUSINESS NORM</th>
<th>EDUCATION NORM</th>
<th>EXCEPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Formal</td>
<td>Decision Authority</td>
<td>Individual</td>
<td>Shared</td>
<td>E - By legislative Act Principals can exercise individual decision authority</td>
</tr>
<tr>
<td>Informal</td>
<td>Decision-Making Rate</td>
<td>Fast</td>
<td>Slow</td>
<td>*</td>
</tr>
<tr>
<td>Informal</td>
<td>Decision-Making Goals</td>
<td>Action on Objective Target</td>
<td>Consensus on Subjective Target</td>
<td>E - Some operating decisions at Boards are focused to deliver action on an objective target</td>
</tr>
<tr>
<td>Informal</td>
<td>Decision Compliance</td>
<td>-Immediately Noticed</td>
<td>Immediately</td>
<td>Not Immediately</td>
</tr>
<tr>
<td>Practice</td>
<td>TLP staff</td>
<td>Noticed</td>
<td>Noticed</td>
<td>Exception</td>
</tr>
<tr>
<td>-------------</td>
<td>-----------</td>
<td>---------</td>
<td>---------</td>
<td>-----------</td>
</tr>
<tr>
<td>Resistance to Decision Authority</td>
<td>- By TLP Staff: Resistance Will Be Penalized</td>
<td>Will Be Penalized</td>
<td>Will Not Be Penalized</td>
<td>E - Resistance to Authority will result in penalty for non-unionized people at Boards</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>FORM</th>
<th>TLP NORM</th>
<th>BUSINESS NORM</th>
<th>EDUCATION NORM</th>
<th>EXCEPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>EXTERNAL RELATIONSHIPS</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Formal Practice</td>
<td>Organizational Connection to External Environment</td>
<td>Direct</td>
<td>Indirect through Trustees</td>
<td>*</td>
</tr>
<tr>
<td>Formal Practice</td>
<td>Barriers to Internal/External Collaboration</td>
<td>None Apparent</td>
<td>Absence of Technology, Physical Isolation, Union Restrictions</td>
<td>E - At Boards, technological, physical and union barriers to collaboration do not exist</td>
</tr>
<tr>
<td>Informal Practice</td>
<td>Employee Experience Outside Organization/Field</td>
<td>All</td>
<td>Few</td>
<td>E - Many new recruits now arrive with experience outside education</td>
</tr>
<tr>
<td>Informal Practice</td>
<td>Extent of Inter-Organizational Collaboration</td>
<td>Extensive and Growing</td>
<td>Limited</td>
<td>*</td>
</tr>
<tr>
<td>Belief</td>
<td>Rationale for Orientation to Collaboration</td>
<td>Collaboration is Necessary</td>
<td>Collaboration is Difficult to Arrange and Can Signal Incompetence</td>
<td>E - Boards believe that external collaboration with business has become necessary</td>
</tr>
<tr>
<td>Belief</td>
<td>Perceived Relationship to External Environment</td>
<td>Connected With</td>
<td>Isolated From</td>
<td>E - Boards perceive an increase in their environmental connectedness</td>
</tr>
<tr>
<td>Belief</td>
<td>Rationale for Business-Education Partnerships</td>
<td>Mutually Beneficial Except Where Product Marketing is the Objective</td>
<td>Mutually Beneficial</td>
<td>E - Some teachers and federations suspect that business seeks to exploit Education as a market forecast detriment to education from partnerships with business</td>
</tr>
</tbody>
</table>

**Business Judgments About Education**
- In education, collaboration is an end in itself unlike business where it is a means to an end
- Education decision-making lacks authority and action
- The prolonged time educators take to make decisions is frustrating

**Education Judgments About Business**

In spite of changes, education remains an isolated, insular, ghettoized, balkanized ivory tower
- Educators are involved in partnerships with business because of scarce resources
- Educators mistrust business people
- Educators forget that business people are also parents and have personal educational agendas
- Educators who say that business people criticize education without understanding that experience, are correct

**Business Judgments About Business**
- Business people are involved in partnerships for altruistic reasons, but corporately, especially in the case of high tech companies, it is a business opportunity couched under social "do-goodism"

**Education**
- Business will want to influence graduate skills, the curriculum and cost to achieve them
### FORM

<table>
<thead>
<tr>
<th>Practice</th>
<th>Financial Matters</th>
<th>TLP Norm</th>
<th>Business Norm</th>
<th>Education Norm</th>
<th>Exception</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Formal Practice</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Revenue Generation Responsibility</td>
<td></td>
<td></td>
<td>Government</td>
<td></td>
<td>E</td>
</tr>
<tr>
<td>Financial Period Focus</td>
<td>Short Term</td>
<td>Short Term</td>
<td>Long Term</td>
<td></td>
<td>E</td>
</tr>
<tr>
<td>Organizational Performance Criteria</td>
<td>Financial &amp; Non-Financial</td>
<td>Financial</td>
<td>Non-Financial</td>
<td></td>
<td>E</td>
</tr>
<tr>
<td>Degree of Financial Orientation in Language &amp; Behavior</td>
<td>High</td>
<td>High</td>
<td>Low</td>
<td>E - Board management is demonstrating a higher degree of financial orientation</td>
<td>E</td>
</tr>
<tr>
<td>Resource Management Strategy</td>
<td>Strategic</td>
<td>Strategic</td>
<td>Across the Board</td>
<td></td>
<td>E</td>
</tr>
<tr>
<td>Definition of 'Financial Accountability'</td>
<td>Make Money and Accept Penalty if Not</td>
<td>Make Money and Accept Penalty if Not</td>
<td>Judiciously Record and Spend Public Funds Granted</td>
<td></td>
<td>E</td>
</tr>
</tbody>
</table>

### FORM

<table>
<thead>
<tr>
<th>Practice</th>
<th>Performance &amp; Its Measurement</th>
<th>TLP Norm</th>
<th>Business Norm</th>
<th>Education Norm</th>
<th>Exception</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Formal Practice</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Organizational Performance Assessment Period</td>
<td>Short Term</td>
<td>Short Term</td>
<td>Long Term</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employee Performance Assessment Period</td>
<td>Annual</td>
<td>Annual</td>
<td>Every Few Years</td>
<td></td>
<td>E</td>
</tr>
<tr>
<td>Organizational Performance Expectations</td>
<td>Clear and Accepted</td>
<td>Clear and Accepted</td>
<td>Unclear and Debated</td>
<td></td>
<td>E</td>
</tr>
<tr>
<td>Employee Performance Criteria</td>
<td>Moving Towards Evaluation Against Measurable Objectives</td>
<td>Evaluation Against Measurable Objectives</td>
<td>Subjective Evaluation</td>
<td></td>
<td>E</td>
</tr>
<tr>
<td>Performance Orientation</td>
<td>Focus on Outcomes and Processes</td>
<td>Outcomes Focus</td>
<td>Process Focus</td>
<td>E - Boards are recognizing a societal demand for education to demonstrate a greater focus on outcomes</td>
<td>E</td>
</tr>
<tr>
<td>Perception of Performance Measurability</td>
<td>All Performance is Measurable</td>
<td>All Performance is Measurable</td>
<td>Performance is Difficult to Fairly Measure</td>
<td>E - At Boards performance is measurable</td>
<td>E</td>
</tr>
<tr>
<td>Perceived Risk of Poor Performance</td>
<td>-High for Staff</td>
<td>High</td>
<td>Low</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Definition of 'Measure'</td>
<td>Document</td>
<td>Document</td>
<td>Text</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Exception:** B = Business, E = Education

---

**Mucation:**

- Business has recently learned that what happens in elementary and secondary schools is as influential on graduates as what happens in university.
- No one group, including business, should be able to subvert the democratic process and directly influence schools to follow a corporate worldview.

**Education Judgments About Business:**

- Traditional principals are threatened by collaboration with the community because they are used to dictating to the community and have not been equipped with the skills to collaborate with it.
- Unlike board people who experience many schools, teachers whose experience involves only one school are very parochial.
- People in education who criticize partnerships believe, incorrectly, that business will take over control.

**Belief:**

- Business has fewer resources to pursue goals than do business,
- Educator's across-the-board allocation of resources is frustrating and limits the potential for growth,
- By not understanding, being uncomfortable with, and finding financial matters distasteful, educators, particularly their teachers, are ignoring reality,
- Educators think they can't go out of business, but they can.

**Education Judgments About Business:**

- Business people don't think educators are financially accountable.
<table>
<thead>
<tr>
<th>Belief</th>
<th>Acceptance of Performance Measurement</th>
<th>High</th>
<th>High</th>
<th>Low</th>
<th>E-Higher at Boards</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Judgments About Education</td>
<td>- Educators are not as accountable for their performance as business people</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Education lacks proper performance measurement</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Lacking proper performance measurement makes the determination of what is better and what to change difficult in education</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Educators don’t agree on what the output should be</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Evidence indicates that education’s performance is poor</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Education Judgments About Business</td>
<td>- Business people don’t understand evaluation and testing</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Business people’s focus on standardized testing is wrong</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Business people (and any other outsider) who criticize education are basing their evaluation on old, personal experience and not on a current understanding of the system</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Form: Power & Authority

<table>
<thead>
<tr>
<th>Practice</th>
<th>Type of Power Exercised by Management</th>
<th>TLP</th>
<th>BUSINESS</th>
<th>EDUCATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Formal</td>
<td>Acquired power over staff &amp; Achieved power with others</td>
<td>Ascribed power over staff &amp; Achieved power with others</td>
<td>Ascribed</td>
<td>Achieved</td>
</tr>
<tr>
<td>Formal</td>
<td>Locus of Mandate &amp; Agenda Control</td>
<td>The Organization</td>
<td>The Organization</td>
<td>Government</td>
</tr>
<tr>
<td>Informal</td>
<td>Acceptance of Authority</td>
<td>- Expected by employees &amp; - Not expected by others</td>
<td>Expected &amp; Not Expected</td>
<td></td>
</tr>
<tr>
<td>Informal</td>
<td>Extent of Reward/ Penalty Tools to Exercise Power</td>
<td>- Many for staff &amp; - Few for others</td>
<td>Many &amp; Few</td>
<td></td>
</tr>
<tr>
<td>Belief</td>
<td>Expected Consequence for Resistance to Authority</td>
<td>Termination</td>
<td>Termination</td>
<td>Transfer</td>
</tr>
<tr>
<td>Belief</td>
<td>Preferred Locus of Authority</td>
<td>Centralized</td>
<td>For Corporate H.Q. - Centralized For Branch Plants - Local</td>
<td>For Boards - Centralized For Schools - Local</td>
</tr>
</tbody>
</table>

### Business Judgments About Education

- Principals and teachers have too much power in education to resist top-down authority
- Board management could exercise more power if they were encouraged

### Education Judgments About Business

- While business people have the power to control their jobs, educators do not

### Form: Professional Development

<table>
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<tr>
<th>Practice</th>
<th>TLP</th>
<th>BUSINESS</th>
<th>EDUCATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Formal</td>
<td>Recruit Requirement for Industry Standard Professional Development</td>
<td>Limited</td>
<td>Limited</td>
</tr>
<tr>
<td>Formal</td>
<td>Opportunity for On-the-Job Professional Development</td>
<td>Not Limited</td>
<td>Not Limited</td>
</tr>
<tr>
<td>Informal</td>
<td>Term for Professional Development</td>
<td>‘Training’ &amp; ‘In-Service’ are used depending on audience addressed</td>
<td>‘Training’ &amp; ‘In-Service’</td>
</tr>
<tr>
<td>Informal</td>
<td>Focus of Professional Development</td>
<td>How to Do It and How to Teach It</td>
<td>How to Do It</td>
</tr>
<tr>
<td>Informal</td>
<td>Recruitment/Induction/Mentoring Programs</td>
<td>- Not Provided for Staff &amp; - Increasingly Provided for Volunteers</td>
<td>Increasingly Provided</td>
</tr>
<tr>
<td>Informal</td>
<td>Investment in Professional</td>
<td>Increasing</td>
<td>Increasing</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>EXCEPTION</th>
<th>B=Business</th>
<th>E=Education</th>
<th>**=None Referenced</th>
</tr>
</thead>
<tbody>
<tr>
<td>E - By legislative Act Principals exercise ascribed power</td>
<td>B - Regulated businesses are subject to mandate requirements dictated by government</td>
<td></td>
<td></td>
</tr>
<tr>
<td>B - Certain Tradespeople and Professionals require industry certification</td>
<td>B - MBA designation is informally valued</td>
<td></td>
<td></td>
</tr>
<tr>
<td>E - Not limited for Board people</td>
<td></td>
<td></td>
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</tbody>
</table>

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<table>
<thead>
<tr>
<th>Belief</th>
<th>Development</th>
<th>T.P.D. is Necessary</th>
<th>P.D. is Necessary</th>
<th>P.D. is Discretionary</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Perceived Value for Professional Development</td>
<td>-High for Staff</td>
<td>-Low for Volunteers</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Perceived Risk for Not Pursuing Professional Development</td>
<td>‘Learning’ is the acquisition and application of knowledge</td>
<td>‘Learning’ is the acquisition and application of knowledge</td>
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</tr>
<tr>
<td></td>
<td>Definition of ‘Learning’</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Business Judgments About Education</td>
<td>-Business has an inferior understanding of professional development compared to education (most)</td>
<td>-Business has a superior understanding of professional development compared to education (high tech, p.d.specialist firms)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>-Teachers don’t need p.d. days during the year because they have the summers to pursue p.d.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>-Teachers lack p.d. exposure to business to make their instruction more relevant and current</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Education Judgments About Business</td>
<td>-Business does not understand how to properly conduct and measure professional development</td>
<td>-Business claims to have effective training, but many employees don’t use what they have been taught</td>
<td></td>
</tr>
<tr>
<td></td>
<td>-Canadian companies spend far less on p.d. than companies elsewhere do</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Education Judgments About Education</td>
<td>-Educators ‘educate’ and do not use the business term ‘training’ because the term is negatively perceived and associated with business</td>
<td>-The lack of new recruit induction programs and mentoring in education has resulted in negative experiences for recruits</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>FORM</th>
<th>PROMOTIONS &amp; REWARD SYSTEMS</th>
<th>TLP NORM</th>
<th>BUSINESS NORM</th>
<th>EDUCATION NORM</th>
<th>EXCEPTION</th>
<th>*=None Referenced</th>
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</thead>
<tbody>
<tr>
<td>Form</td>
<td>Practice</td>
<td>Upward Mobility Path</td>
<td>Not Prescribed</td>
<td>Not Prescribed</td>
<td>Prescribed</td>
<td>*</td>
</tr>
<tr>
<td></td>
<td>Formal Practice</td>
<td>Industry Standard Credentials</td>
<td>Not Required for Promotion</td>
<td>Not Required for Promotion</td>
<td>Required for Promotion</td>
<td>B- The MBA designation is informally recognized</td>
</tr>
<tr>
<td></td>
<td>Formal Practice</td>
<td>Opportunity for Upward Mobility</td>
<td>Increasing due to Expansion</td>
<td>Decreasing due to Downsizing</td>
<td>Decreasing due to Downsizing</td>
<td>B- Increasing among small businesses and high tech firms</td>
</tr>
<tr>
<td></td>
<td>Formal Practice</td>
<td>Compensation and benefits for Management and Professionals</td>
<td>-Not Standardized -Performance-based -Confidential -Annual</td>
<td>-Not Standardized -Performance-based -Confidential -Annual</td>
<td>-Standardized -Seniority-based -Published -Contractual Period</td>
<td>B- Recent regulations require public disclosure of officer compensation E- Directors’ compensation is: -Not Standardized -Performance-based -Confidential -Annual</td>
</tr>
<tr>
<td></td>
<td>Formal Practice</td>
<td>Board &amp; Management Demographic</td>
<td>-White Male/Female Mgmt. -White Male Dominated Board</td>
<td>White Male Dominated</td>
<td>-White Male/Female Trustees -White Male Dominated Mgmt.</td>
<td>B- For government regulated businesses, equity practices required E- Recent government equity requirements have prompted an increase in promotion of women into management</td>
</tr>
<tr>
<td></td>
<td>Informal Practice</td>
<td>Criteria determining Retention/ Promotion</td>
<td>Performance</td>
<td>Performance</td>
<td>Seniority</td>
<td>E- Performance is the criteria for promotion into and through mgmt.</td>
</tr>
<tr>
<td></td>
<td>Informal Practice</td>
<td>Range and Type of Incentive Offerings</td>
<td>Wide Range of Financial and Non-Financial Perks</td>
<td>Wide Range of Financial and Non-Financial Perks</td>
<td>Narrow Range of Non-Financial Perks</td>
<td>*</td>
</tr>
<tr>
<td></td>
<td>Belief</td>
<td>Perception of Job Security</td>
<td>Low</td>
<td>Low</td>
<td>High</td>
<td>*</td>
</tr>
<tr>
<td></td>
<td>Belief</td>
<td>Valued Measures of Success</td>
<td>Intrinsic and Extrinsic</td>
<td>Extrinsic</td>
<td>Intrinsic</td>
<td>E- For those who seek it, promotion signals success</td>
</tr>
</tbody>
</table>

<p>| Business Judgments About Education | -Educators are paid regardless of the level of performance | -Educators promote ‘old behaviors’ |
| Education Judgments About Business | -Business leaders receive greater compensation than education leaders |
| Education Judgments About Education | -Some educators are not earning their pay cheques |</p>
<table>
<thead>
<tr>
<th><strong>FORM</strong></th>
<th><strong>TLP NORM</strong></th>
<th><strong>BUSINESS NORM</strong></th>
<th><strong>EDUCATION NORM</strong></th>
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<tbody>
<tr>
<td>Formal Practice</td>
<td>Structure For Risk</td>
<td>Risk-prone</td>
<td>Risk-prone</td>
<td>Risk-averse</td>
</tr>
<tr>
<td>Informal Practice</td>
<td>Orientation in Language and Behaviors</td>
<td>-Risk-taking in nature</td>
<td>Risk-taking</td>
<td>Risk-averse</td>
</tr>
<tr>
<td>Belief</td>
<td>Rationale for Risk Orientation</td>
<td>To pursue outcomes risk-taking is required, but project implementation requires a risk-averse approach</td>
<td>Survival requires risk-taking</td>
<td>It is difficult to muster the support, authority and resources to take risks</td>
</tr>
</tbody>
</table>

**Business Judgments About Education**
- In Education the system and the people don’t take risks
- The Education structure and operation is moribund because management won’t take the risk to change it

**Education Judgments About Business**
- CEO’s and Directors can take more risks than others in their organizations

<table>
<thead>
<tr>
<th><strong>FORM</strong></th>
<th><strong>ROLES &amp; RESPONSIBILITIES</strong></th>
<th><strong>TLP NORM</strong></th>
<th><strong>BUSINESS NORM</strong></th>
<th><strong>EDUCATION NORM</strong></th>
<th><strong>EXCEPTION</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Formal Practice</td>
<td>Organizational Roles</td>
<td>Equally Social and Economic</td>
<td>Economic</td>
<td>Social</td>
<td>B - Social issues are becoming a greater concern for management E - Economic issues are becoming a greater concern for management</td>
</tr>
<tr>
<td>Informal Practice</td>
<td>Clarity and Acceptance of organizational role</td>
<td>High</td>
<td>High</td>
<td>Low</td>
<td>*</td>
</tr>
<tr>
<td>Informal Practice</td>
<td>Board and Management Role Designations</td>
<td>Directors, President and CEO, V.P., Manager...</td>
<td>Directors, President, CEO, COO, CFO, Vice President, Manager, Supervisor...</td>
<td>Trustees, Director, Superintendent, Principal, Vice Principal...</td>
<td>E - At some Boards, Directors assume the title: “CEO”</td>
</tr>
<tr>
<td>Informal Practice</td>
<td>Management Style</td>
<td>‘Democratic Facilitators’</td>
<td>Has Changed from ‘Autocratic Controller’ to ‘Democratic Facilitator’</td>
<td>Is Changing from ‘Autocratic Controller’ to ‘Democratic Facilitator’</td>
<td>E - Some Principals and Teachers remain ‘Autocratic Controllers’</td>
</tr>
<tr>
<td>Informal Practice</td>
<td>Locus of Role Conflict</td>
<td>Between TLP and some Board Partnership Directors</td>
<td>Between Senior and Middle Management</td>
<td>Between Board Officials and Principals</td>
<td>*</td>
</tr>
<tr>
<td>Belief</td>
<td>Role Affiliation</td>
<td>Commitment to Boundary Spanner Role</td>
<td>Commitment to Business Role</td>
<td>Commitment to Education Role</td>
<td>*</td>
</tr>
<tr>
<td>Belief</td>
<td>Perception of Skill / Function Similarity</td>
<td>Among ‘administrators’, ‘managers’</td>
<td>Among ‘administrators’, ‘managers’</td>
<td>Among ‘administrators’, ‘managers’</td>
<td>*</td>
</tr>
<tr>
<td>Belief</td>
<td>Rationale for Change in Management Style</td>
<td>N/A</td>
<td>Changing from ‘knowledge keeper’ to ‘knowledge facilitator’ due to information explosion</td>
<td>Changing from ‘knowledge keeper’ to ‘knowledge facilitator’ due to information explosion</td>
<td>*</td>
</tr>
<tr>
<td>Belief</td>
<td>Perception About Affiliation Status of Professionals</td>
<td>N/A</td>
<td>Professionals rank above Unions which are for Teachers</td>
<td>Teacher Federations rank Above Unions</td>
<td>E - The dissatisfied and militant consider the Federation to be a union</td>
</tr>
<tr>
<td>Belief</td>
<td>Perceived Business Participation in Public Education</td>
<td>Business has a role in public education, and education role requires business involvement and support</td>
<td>Education has a role in public education, and education role requires business assistance</td>
<td>B - There are business people who believe business has no role in education</td>
<td></td>
</tr>
<tr>
<td>-------</td>
<td>------------------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td></td>
</tr>
<tr>
<td>Business Judgment</td>
<td>Some teachers cannot give up control</td>
<td>A unionized professional is an oxymoron, and teachers who are unionized can't expect to be treated as professionals</td>
<td>People in the education system use the children as a cover for the pursuit of self-interests</td>
<td>- Schools should prepare children for the workplace because that is where they all end up</td>
<td></td>
</tr>
<tr>
<td>Education Judgment</td>
<td>Business people see their role as a 'job', but teachers see their role as a 'mission'</td>
<td>Many teachers believe that their role is not to serve the employment needs of business</td>
<td>People in business get to be big 'somebodies', and educators only get to be little 'somebodies' in society's eyes</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Education Judgment</td>
<td>Boards are business operations</td>
<td>Boards have more in common with businesses than they do with schools</td>
<td></td>
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<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>FORM</th>
<th>STAKEHOLDERS</th>
<th>TLP NORM</th>
<th>BUSINESS NORM</th>
<th>EDUCATION NORM</th>
<th>EXCEPTION</th>
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<tbody>
<tr>
<td>Formal Practice</td>
<td>Criteria for Stakeholder Recognition</td>
<td>-Financial Investment for businesses</td>
<td>Financial Investment</td>
<td>Geographic Residence</td>
<td>B</td>
</tr>
<tr>
<td>Formal Practice</td>
<td>Title of Organizational Stewards</td>
<td>Board of 'Directors'</td>
<td>Board of 'Directors'</td>
<td>Board of 'Trustees'</td>
<td>E</td>
</tr>
<tr>
<td>Formal Practice</td>
<td>Frequency of Stakeholder/Board Involvement</td>
<td>-Members = Once/Year -Board = Avg. Once/Month</td>
<td>-Shareholders = Once/Year -Board = Avg. Once/Month</td>
<td>-Voters = Approx. Every Four Years -Board = Twice/Month</td>
<td>*</td>
</tr>
<tr>
<td>Formal Practice</td>
<td>Authority to Run the Organization</td>
<td>Shared between Management and the Board</td>
<td>Ceded to Management Officers</td>
<td>Shared between Management, Government and Trustees</td>
<td>*</td>
</tr>
<tr>
<td>Formal Practice</td>
<td>Boardmember Selection Process</td>
<td>-Selected by Sr. Officers of the Board -Ratified as a slate by members</td>
<td>-Selected by Sr. Officers of the Board -Ratified as a slate by shareholders</td>
<td>-Self selected -Individually elected by the public</td>
<td>*</td>
</tr>
<tr>
<td>Informal Practice</td>
<td>Stakeholder Contact Responsibility</td>
<td>Senior Management</td>
<td>Senior Management</td>
<td>Board Senior Management</td>
<td>E - By formal practice of legislation, schools have recently been required to establish councils to facilitate stakeholder contact</td>
</tr>
<tr>
<td>Informal Practice</td>
<td>Stakeholder Differentiation</td>
<td>-Does Not Rank Stakeholders</td>
<td>-Ranks Stakeholders</td>
<td>-Does Not Rank Stakeholders</td>
<td>E - Schoolboards appear to rank the Ministry and now business above other stakeholders</td>
</tr>
<tr>
<td>Belief</td>
<td>Board Ideological Composition</td>
<td>Homogeneous</td>
<td>Homogeneous</td>
<td>Heterogeneous</td>
<td>*</td>
</tr>
<tr>
<td>Belief</td>
<td>Perception Towards Diverse Interests/Opinions</td>
<td>Diverse interests should be acknowledged and informed but can't be accommodated unless they have an instrumental value for the organization</td>
<td>Diverse interests can be accommodated if they have an instrumental value for the company</td>
<td>Diverse interests should be accommodated if at all possible</td>
<td>B - Some business people believe that businesses should move from a 'shareholder' to a more inclusive 'stakeholder' focus to address other interest groups which could influence company performance</td>
</tr>
</tbody>
</table>

- Education has abundant management, but very little discernable accountability
- In Education it is difficult to determine 'who's the boss?'
- Education's requirement to serve so many constituent needs is frustrating
- The heterogeneous and changing ideologies of boards of education is unproductive
- Businesses expose a concern for the public interest but few have developed the infrastructure and skills to do public consultation
- In business there is no need to satisfy a larger public constituency
- In society as a whole, multiple interest groups are growing and their expectations and voices aren't just being directed towards education, but also towards business operations
<table>
<thead>
<tr>
<th>FORM</th>
<th>TIME</th>
<th>TLP NORM</th>
<th>BUSINESS NORM</th>
<th>EDUCATION NORM</th>
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<tbody>
<tr>
<td>Formal Practice</td>
<td>Outcomes Realization Period</td>
<td>Short Term</td>
<td>Short Term</td>
<td>Long Term</td>
<td>B - CEO's and HR also focus on longer term</td>
</tr>
<tr>
<td></td>
<td>Decision-Making Time</td>
<td>Short for policy/ project selection</td>
<td>Short</td>
<td>Lengthy</td>
<td>B - Outcomes are realized more slowly in big business than in small firms</td>
</tr>
<tr>
<td>Formal Practice</td>
<td>Formal On-The-Job Time</td>
<td>Longer than Education</td>
<td>Longer than Education</td>
<td>Shorter than Business</td>
<td>E - Longer than Education at Boards</td>
</tr>
<tr>
<td>Formal Practice</td>
<td>Demographic Temporal Orientation</td>
<td>Adults</td>
<td>Adults</td>
<td>Children</td>
<td>E - Boards are oriented to Adults</td>
</tr>
<tr>
<td>Informal Practice</td>
<td>Role &amp; Place Turnover</td>
<td>- Relatively Low for staff - High for volunteers - Low but rising for financial supporters</td>
<td>High</td>
<td>Low</td>
<td>E - High place turnover for Principals, VP's, and lower level Board people</td>
</tr>
<tr>
<td>Informal Practice</td>
<td>Sense of Urgency in Language &amp; Behavior</td>
<td>High</td>
<td>High</td>
<td>Low</td>
<td></td>
</tr>
<tr>
<td>Informal Practice</td>
<td>Concern for Time Management at Meetings</td>
<td>High</td>
<td>High</td>
<td>Low</td>
<td>E - higher among Board people</td>
</tr>
<tr>
<td>Informal Practice</td>
<td>Investment of Personal Time On-The-Job</td>
<td>Expected</td>
<td>Expected</td>
<td>Discretionary</td>
<td>E - Expected for Board people and those seeking promotion</td>
</tr>
<tr>
<td>Belief</td>
<td>Rationale for Time Orientation</td>
<td>The Time Frame Needs of Business and Education are Different and Must both be Accommodated</td>
<td>The Need for Decisiveness calls for Short Time Frames</td>
<td>The Need for Deliberation requires Long Time Frames</td>
<td>*</td>
</tr>
<tr>
<td>Belief</td>
<td>Criteria for working hard</td>
<td>- Time and Resource Related</td>
<td>- Time-Related</td>
<td>Function-Related</td>
<td>*</td>
</tr>
<tr>
<td>Judgments by Business People</td>
<td>- The time Educators take at meetings, and to make decisions, is frustrating - Educator's formal on-the-job time and discretionary personal time investment at work does not represent &quot;real life&quot; - Educators don't work very hard - Educators are &quot;lazy&quot;</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Judgments by Business People</td>
<td>- In Business, your working day is your life - Business people are impatient and have short term time expectations</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Educators</td>
<td>- Business people focus their time on performance over relationships</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>FORM</td>
<td>TRANSPORTATION &amp; CHANGE NORM</td>
<td>TLP NORM</td>
<td>BUSINESS NORM</td>
<td>EDUCATION NORM</td>
<td>EXCEPTION</td>
</tr>
<tr>
<td>Formal Practice</td>
<td>Structure for Change</td>
<td>Flexible</td>
<td>Becoming More Flexible</td>
<td>Inflexible</td>
<td>*</td>
</tr>
<tr>
<td>Formal Practice</td>
<td>Locus of Authority to Effect Structural Transformation</td>
<td>The Organization</td>
<td>The Organization</td>
<td>Government</td>
<td>*</td>
</tr>
<tr>
<td>Informal Practice</td>
<td>Locus of Recent Organizational Change</td>
<td>Structure and Processes</td>
<td>Structure and Processes</td>
<td>Processes</td>
<td>E - Boards have also made structural changes that are outside the traditional organizational boundary of education</td>
</tr>
<tr>
<td>Informal Practice</td>
<td>Rate of Change</td>
<td>Fast</td>
<td>Fast</td>
<td>Slow</td>
<td></td>
</tr>
<tr>
<td>Belief</td>
<td>Perception of the Change Process</td>
<td>Change is Difficult but can be Facilitated Through Inter-Organizational Relations</td>
<td>Change is Difficult without the Threat of Termination</td>
<td>Change is Difficult and Can be Pointless</td>
<td>*</td>
</tr>
<tr>
<td>Belief</td>
<td>Attitude to Change</td>
<td>There is High Risk to Not Being Able to Effect Change</td>
<td>There is a High Risk For Not Changing</td>
<td>There is a High Risk for Changing</td>
<td>*</td>
</tr>
<tr>
<td>Business</td>
<td>- Education, unlike other working environments has not physically/structurally changed in a century</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Form</td>
<td>VERBAL COMMUNICATION</td>
<td>TLP NORM</td>
<td>BUSINESS NORM</td>
<td>EDUCATION NORM</td>
<td>EXCEPTION</td>
</tr>
<tr>
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<td>---------------</td>
<td>----------------</td>
<td>-----------</td>
</tr>
<tr>
<td>Formal Practice</td>
<td>Workspace Name</td>
<td>&quot;TLP&quot;, &quot;The Partnership&quot;, 'the/our Office'</td>
<td>'The/Our Company', 'The Office'</td>
<td>'My School', 'My Class'</td>
<td>E - Board of Education names: &quot;The Board&quot;, &quot;The office&quot;</td>
</tr>
<tr>
<td>Formal Practice</td>
<td>Workspace Physical Structure</td>
<td>'Office' Structure Designed, Configured and Decorated for Adult Individuals</td>
<td>'Office' Structure Designed, Configured and Decorated for Adult Individuals</td>
<td>'School' Structure Designed, Configured and Decorated Primarily for Groups of Children</td>
<td>E - At Boards and in parts of schools 'Office' Structure Designed, Configured and Decorated for Adult Individuals</td>
</tr>
<tr>
<td>Formal Practice</td>
<td>Presence of Technology</td>
<td>Pervasive</td>
<td>Pervasive</td>
<td>Limited</td>
<td>E - Less limited at Boards</td>
</tr>
<tr>
<td>Formal Practice</td>
<td>Access to Information</td>
<td>Direct for Business - Often Indirect for Education</td>
<td>Direct</td>
<td>Indirect</td>
<td>E - Boards have access to more direct information than schools because of the opportunity to network</td>
</tr>
<tr>
<td>Formal Practice</td>
<td>Role Rank Visibility</td>
<td>Apparent in office space features</td>
<td>Apparent in office space features space</td>
<td>Not Apparent in classroom space features</td>
<td>E - Apparent in office space features at Boards</td>
</tr>
<tr>
<td>Informal Practice</td>
<td>Dress</td>
<td>-Staff adopt business attire -Business members appear to 'dress down' and education members appear to 'dress up' for meetings</td>
<td>Formal, Subdued, Structured</td>
<td>Informal, Bright, Unstructured</td>
<td>E - At Boards among senior officers dress is formal, subdued and structured</td>
</tr>
<tr>
<td>Informal Practice</td>
<td>Jargon For Administrative Headquarters</td>
<td>N/A</td>
<td>&quot;Ivory Tower&quot;</td>
<td>&quot;Ivory Tower&quot;</td>
<td>*</td>
</tr>
<tr>
<td>Informal Practice</td>
<td>Nature of Speech Patterns, Language, Jargon</td>
<td>Terms and phrases from both Education and Business are used, Depending on Audience</td>
<td>Identifiably Business-Oriented</td>
<td>Identifiably Pedagogical</td>
<td>E - At Boards, on matters of operation some business terms are used</td>
</tr>
<tr>
<td>Informal Practice</td>
<td>Language Orientation</td>
<td>Facts and People</td>
<td>Facts</td>
<td>People</td>
<td>E - Higher degree of fact orientation Board people's language about operational issues</td>
</tr>
<tr>
<td>Informal Practice</td>
<td>Approach to Speaking</td>
<td>Reserved</td>
<td>Reserved</td>
<td>Unreserved</td>
<td>*</td>
</tr>
<tr>
<td>Informal Practice</td>
<td>Degree of Explanation in Speech</td>
<td>High</td>
<td>Low</td>
<td>High</td>
<td>*</td>
</tr>
<tr>
<td>Informal Practice</td>
<td>Tolerance for Confrontation</td>
<td>Relatively High</td>
<td>Relatively High</td>
<td>Low</td>
<td>*</td>
</tr>
<tr>
<td>Informal Practice</td>
<td>Patience Level in Communication Reception</td>
<td>Relatively High</td>
<td>Relatively High</td>
<td>Low</td>
<td>High</td>
</tr>
<tr>
<td>Informal Practice</td>
<td>Communication Response Rate</td>
<td>Relatively Fast</td>
<td>Fast</td>
<td>Slow</td>
<td>*</td>
</tr>
<tr>
<td>Belief</td>
<td>Primary Qualities Valued in Communications</td>
<td>Brevity/Usefulness and Thoroughness/Understanding Depending on Audience</td>
<td>Brevity/Usefulness</td>
<td>Thoroughness/Understanding</td>
<td>*</td>
</tr>
<tr>
<td>Belief</td>
<td>About Organizational Language</td>
<td>Each Sector has its own Particular Words and Language Patterns</td>
<td>Each Organization has its own Particular Words and Language Patterns</td>
<td>Each Organization has its own Particular Words and Language Patterns</td>
<td>*</td>
</tr>
</tbody>
</table>


Barrett, I. (undated). Let’s Do It Right...Together. A Publication of the Board of Education for the City of Etobicoke.


Johnsen, Weilbach & Williams (1986)


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