**Turbulence Theory and its Application to School Leadership**

Steven Jay Gross

Professor Emeritus

Educational Leadership

Temple University

**Overview**

In our increasingly complex world, the turbulent forces surrounding educators have become vastly more dynamic, opening critical challenges and remarkable opportunities. To respond effectively, educational leaders need new and more powerful tools. This workshop is designed to meet this pressing need by providing innovative, case-based examples and hands-on participation that ties Turbulence Theory to the practice of educational leadership.

**Specifically our time together will be divided into 5 parts:**

**Part 1. Warm-up:** Starting hands-on with the concept of turbulence and the practice of educational leadership.

**Part 2. Taking a step back** to see the wider context of turbulence in our era and its relationship to equity**.**

**Part 3. Reclaiming Education Reform** in an age of Turbulence and Inequity.

**Part 4. Zeroing in on Turbulence.** Learning the basics of Turbulence Theory through hands-on practice.

**Part 5. Hands-on work** with Turbulence Theorythrough authentic cases.

**Part 1. Warm-up: Starting hands-on with the concept of turbulence and the practice of educational leadership:**

Think of the most turbulent thing related to equity that has ever happened in your professional life. Please write your answer to this question: *How did you handle the situation?* Next, please share your answers with your immediate neighbor. Please keep your notes since they will be used later in the workshop.

(5 minutes to think and write and 5 minutes to share with a neighbor) (**10 minutes in total)**

**Part 2. Taking a step back to see the wider context of turbulence in our era and its relationship to equity:**

We will review the general condition of four critical forces that shape our current international context each of which has a bearing on our schools. These four forces are: *Security, Economics, Technology, and the Environment.*

We will also consider their impact our work, especially as we try to mitigate the challenges facing marginalized students and their families.

Presentation of each area will be via Power Point. Afterwards you will be asked to “vote with your feet” by moving to the corner of the room that reflects the greatest impact (*Security, Economics, Technology, or the Environment*). Newsprint will be used at each corner for a carousel of comments further defining each one of the areas in question. These will be collected by facilitators and shared with the participants as a group of the whole. (ideas from 2 facilitator just as a sample.) **(5 minutes for presentation, 15 minutes for people to move to their corner and write and 5 minutes for 2 sample facilitator contributions) 20 minutes in total).**

**Part 3. Reclaiming Education Reform in an age of Turbulence and Inequity**

Given all of the turbulence surrounding our field, especially in marginalized communities, we will consider an alternative vision for educational leadership summarized in the 5 New DEEL (Democratic Ethical Educational Leadership) Vision for Leaders (Gross and Shapiro 2016). These include:

1. Guided by an inner sense of responsibility to students, faculty, staff, families, the community, and social development on a world scale.
2. **Leading from an expansive community-building perspective. A democratic actor who understands when and how to *shield* the school from turbulence and when and how to *use* turbulence to facilitate change. (Please note that this one is our focus for today)**
3. Integrating the concepts of democracy, social justice, and school reform through scholarship, dialogue, and action.
4. Operating from a deep understanding of ethical decision making in the context of a dynamic, inclusive, democratic vision.
5. Seeing one’s career as a calling and having a well-developed sense of mission toward democratic social improvement that cuts across political, national, class, gender, racial ethnic and religious boundaries.

(The Power Point for these will include an exemplar for each)

**(15 Minutes)**

**Part 4. Zeroing in on Turbulence (Vision Statement #2 above). Learning the basics of Turbulence Theory through hands-on practice:**

**Turbulence Theory (TT) in a nutshell:**

**There are 3 Underlying Forces Causing Turbulence to Rise or Fall**

(I will make a 5 minute presentation of these with Power Point slides)

**Positionality:** The Turbulence one experiences depends upon where you are in a given situation

**Cascading**: Turbulence feeding upon itself or the result of combined turbulent forces.

**Stability:** The relationship between the organization and the forces weighing upon it.

**There are 4 Levels of Turbulence**

(I will make a 5 minute presentation of these with Power Point slides)

**Light:**

On going issues, little or no disruption in normal work environment, subtle signs of stress

**Moderate:**

Widespread awareness of the issue, specific origin

**Severe:**

Fear for the entire enterprise, possibility of a larger-scale community demonstration, a feeling of crisis

**Extreme:**

Structural damage to the institution’s normal operation is occurring.

**Now we will put Turbulence Theory to work for you:**

**Step 1: Reflect on your case from the warm-up exercise.** On your own please refer back to your notes and read them over briefly **(2 minutes)**

**Step 2: Determine the role of the three drivers of turbulence:**

1. Positionality: How different people and or groups can see the same issue.
2. Cascading: How events can compound to accelerate turbulence.
3. Stability: How an organization’s stability or lack of it can cause turbulence to rise or diminish.

First, please reflect on your case and note briefly how each of these three drivers played a part. Next please determine which one(s) were most significant. (Your notes from the warm up exercise will give you a head start to build upon.)

**(5 minutes)**

**Step 3: Decide on the general level of turbulence.** Each of the four levels of turbulence will be defined and illustrated. You’ll then be asked to review your case to determine how turbulent your case was in general.

1. Light: An ongoing issue, little or no disruption.

1. Moderate: widespread awareness of the issue, specific origin. General concern.
2. Severe: Fear for the entire enterprise. A feeling of crisis.
3. Extreme: Structural damage to the institution’s normal operation is occurring. **(5 minutes)**

**Step 4: Describe actions taken:** What actions did you take?

Did you tone-down the turbulence? Did you escalate the turbulence? Would you take the same course of action again in a similar situation? Next, please share the summary of your case with your tablemates. **(This will require a facilitator for each table as well as a timekeeper.) (10 minutes)**

**Part 5. Hands-on work with Turbulence Theory through authentic cases:** Each table will work on an authentic case as a team. There will be 3 different cases so that after the workshop participants can discuss a wider variety of turbulent situations related to equity for marginalized groups. (Roles will be given for each table: 1 facilitator, 3 people each for Positionality, Stability, and Cascading. 1 timekeeper andnote taker.)

(Note: these steps reflect those in part 4 above. The idea is to provide application through practice and group support.)

**Step 1: Read the case as a group**. Think deeply about the case and free write/brainstorm (each person does this individually). **(5 minutes)**

**Step 2: Decide how serious things were for each of the three drivers**

Positionality, Cascading, and Stability). Remember 3 of you each for Positionality, Cascading, and Stability. Discuss, debate and decide. **(10 minutes)**

**Step 3. The whole table decides on a general level of turbulence** (Light, Moderate, Severe, or Extreme) This is done by the whole group. **(5 minutes)**

**Step 4. Tone down the turbulence or escalate it?** (Whole table discussion organized by the facilitator) **(5 minutes)**

**Step 5. Based on the 4 steps above what actions would you advise the main character in your case to take?** Do you all agree? What are alternative points of view?(Whole table discussion organized by the facilitator) **(10 minutes)**

**(Total for this part of the workshop 35 minutes)**

**Case 1:**

**Test Rooms versus Rest Rooms:**

It’s time for standardized test week at the Wonderbrook Middle School. State testing regulations say that students cannot use the restrooms during tests. Leaving a proctor to watch the rest of the class, Teacher Smith escorts a student who urgently needs to use the bathroom. She is reported to the principal by another teacher, Teacher Jones, who fears that the rules were broken, perhaps placing the reputation of the school in jeopardy. These two teachers have not gotten along well in the past. Teacher Smith is innovative, creative, and well loved by families. She is also rarely political so people on the faculty and staff can relate to her since she doesn’t polarize them. Teacher Jones is more traditional, a little edgy but also has supporters. On key issues both have helped shape faculty opinion. Both have allies in the community and among parents.

You are Principal Wisdom, what do you do? On the one hand, a rule seems to have been broken. On the other hand, is it really right to not allow a student to go to the bathroom, even during tests? You, of course, must follow testing rules but you are also dubious of the need to test so much and for such high stakes. You’ve done what you could to humanize the environment for students but this has not always been popular with traditionalists on the faculty and for some wealthier parents in your economically divided community. Word of the incident has gotten out to the faculty and to the community. You’ve heard both support for and criticism of Teacher Smith. You also realize that the student in question comes from an economically disadvantaged part of the community. This isn’t the only thing you’re dealing with. You have a budget to work on as well as parent-teacher conferences coming up. Finally, you have been asked to call back a reporter from a local newspaper as you wonder what the superintendent will think about the situation. (*Please think through this case from the perspective of Principal Wisdom*)

**Please follow the following 5 steps: *(FACILITATOR: PLEASE READ THESE STEPS TO YOUR GROUP AS THEY WORK THROUGH THIS CASE)***

**Step 1: Read the case as a group**. Then think deeply about the case and free write/brainstorm (each person does this individually). **(5 minutes)**

**Step 2: Decide how serious things were for each of the three drivers** (Positionality, Cascading, and Stability). (Here the group is divided into threesomes- one each for Positionality, Stability, and Cascading. This will allow everyone to go deeper into each one and report back to the whole group. Please see the gauge below for each of these since this might help you in your thinking things through. (Facilitators and Timekeepers please note: You *are critical here.* Please provide enough time for the threesomes to reflect and then please keep the whole group on task to decide how serious things are for each of the three drivers. Postionality, Cascading and Stability) **(10 minutes)**

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|  | **Positionality Turbulence Gauge** |  |
| **Degree of Turbulent Impact** | **General Definition** | **Applied to this Case** |
| Light | Most people seem to be seeing this issue in the same way |  |
| Moderate | Two or three factions seem to be forming |  |
| Severe | Multiple factions are moving towards action |  |
| Extreme | Critical differences among factions is redefining the school and community. New alliance patterns seem likely.  |  |

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|  | **Cascading Turbulence Gauge** |  |
| **Degree of Turbulent Impact** | **General Definition** | **Applied to this Case** |
| Light | There is calmness with little sign of new conditions complicating the situation. |  |
| Moderate | Two or three conditions are interacting to accelerate the situation. |  |
| Severe | Multiple forces propel the situation as it gains momentum.  |  |
| Extreme | A torrent of forces sweeps away almost all other issues as the current order seems destined to transform.  |  |

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|  | **Stability Turbulence Gauge** |  |
| **Degree of Turbulent Impact** | **General Definition** | **Applied to this Case** |
| Light | A solid reputation for effectiveness supported by concrete evidence  |  |
| Moderate | Cracks in the image of the organization are starting to show. Key groups are voicing doubts. |  |
| Severe | Trust from multiple directions has eroded. Key structures supporting the current organizational structure are weakened. |  |
| Extreme | Most stakeholders are expecting the continued volatility. Personnel shifts are taking place. Challenges to the foundations of the current organization are constant. Dynamic change is within sight.  |  |

**Step 3. The whole table decides on a general level of turbulence** (Light, Moderate, Severe, or Extreme) based on your evaluation of the drivers. Please consult the turbulence gauge below. **(5 minutes)**

|  |  |  |
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|  | **General Turbulence Gauge** |  |
| **Degree of Turbulence** | **General Definition** | **Applied to this case** |
| Light | On going issue, little disruption |  |
| Moderate | Widespread awareness of the issue |  |
| Severe | Fear for the entire enterprise |  |
| Extreme | Structural damage to the institution’s normal operation. |  |

**Step 4. Tone down the turbulence or escalate it?** What are the possibilities and implications for toning-down the turbulence? What are the possibilities/implications for escalating the turbulence? (Whole table discussion organized by the facilitator) **(5 minutes)**

**Step 5. Based on the 4 steps above what actions would you advise the principal in your case to take?** Do you all agree? What are alternative points of view?(Whole table discussion organized by the facilitator) **(10 minutes)**

**Case 2*: Rigor or Rhetoric?***

**Albert F. Catarro**

The anxiety and anticipation for the upcoming school year was different from the past ten summers, as this was Mr. Rogers first year as teachers’ association president. He had to prepare an address for the first in-service day and he was excited about it. The school year was initiated in the auditorium of the high school and there were to be speeches. Each address turned out to be unique. The school board president complimented the support staff on a fine job of preparing the school buildings and wished the teachers well for a successful school year. The superintendent made a scholarly speech referencing educational leaders, spoke of the need for a school community, collaborative cultures, and stressed that although he was new to the district, his door was always open if he could help. The superintendent was hired during the last school year, and this was his first opportunity to address the entire faculty and staff. Since he was new, his ideas and ideals had yet to permeate the schools, and many of the district administrators did not share the vision of the new superintendent. Mr. Roger’s address centered on how committed he was as the new association president and also discussed issues in a way that paralleled well with the superintendent’s position.

Following the assembly, as was the custom, in-service training occurred in the individual buildings. The first afternoon event was a high school faculty meeting. The principal, Mrs. Stricton, began with her usual speech. The topics included the initiatives for the year, emphasizing strict enforcement of school rules, high standardized testing results, and her pet project, the need for academic rigor. The principal cited reasons for these foci, discussing the model of High Schools That Work and state testing requirements. Also mentioned was a requirement for a complex writing assignment in every class as part of the new rigor initiative. Mrs. Stricton had a top-down managerial style of leadership. She firmly dictated from atop her chain of command.

Ms. Little, a special education teacher who was also certified in English, seized this opportunity to challenge her students with the rigor initiative. She proposed at a special education department meeting to adopt a district policy that allowed teachers to assign a final project instead of a final exam for her classes. This had always been an option but it had been efficient to issue an exam. Policy also stated that students who did not complete the final requirements did not pass the course. Ms. Little and the special education department modified the syllabus for each class to include the rigor initiative to replace the final exam with a final writing project. The project would consist of a five-page research paper on a topic assigned by the teacher. The rubric for the project included accommodations that would be made in the project to align with the IEP for the special education students.

Ms. Little was well respected in the district. She employed the ethic of care with her students and treated them as individuals with tremendous results. This year, however, she had Billy Winston in her freshman English class. Billy and his parents were well known in the district. They had an advocate and special education attorney on retainer to ensure that Billy received the type of education he needed. The district’s special education supervisor, Mr. Abler, had regular interactions with the Winston family. In the past, the district avoided litigation threats by consistently accepting their demands. Billy’s teachers had been forced to change grades, reduce discipline, and ignore infractions.

All of this came to a head in the first ten minutes of Ms. Little’s class while she was reviewing the syllabus, which now included the rigor initiative and the research project. Billy boldly proclaimed there was no way that he would be doing a research project. He added that he would pass the class because his lawyer would take care of it. Ms. Little addressed the situation by requesting students not to call out in class, and explained school policy. She emphasized that completion of the final was required for every student to pass the course. However, she could see that Billy was not impressed.

Ms. Little prominently displayed a poster detailing the project in her classroom. On back-to-school night, parents were presented with a copy of the syllabus and the research project instructions. Ms. Little was deliberate in her presentation of the project, as she was well aware of the legal ramifications of special education and was secure that she was crystal clear in her expectations and followed school policy precisely. Although Ms. Little was not Billy’s IEP teacher, she informed that teacher and Billy’s parents about the expectations for the course, as well as his reluctance to complete the project.

The semester progressed and Ms. Little dedicated time to every student to personally assign a research topic related to ninth-grade English. The students were also allotted computer lab time for research and paper preparation. Ms. Little stressed the importance of the final project and reminded the students that the class time wasted would require that much more homework time on it.

Ms. Little considered the interests of the students in assigning the research topic. Billy was assigned an appropriate topic and spent most of his research time on the Internet viewing pictures of motorcycles and little time actually researching. He did, however, make token investigations and took some superficial notes. His notes in total would not fill five paragraphs, let alone five pages.

The due date of the project came, and Ms. Little collected the work. Billy was true to his word and did not submit a paper. Immediately, she called his parents at home to inform them. She was surprised at their response. The parents read the paragraph in Billy’s IEP that stated they must be informed in writing if there was a possibility of Billy failing the class. Their position was that they were not properly notified, so he could not fail her class. Ms. Little replied that the failure was school policy concerning final projects, indicated as part of her syllabus, explained in a handout on back-to-school night, and clearly posted in her room. The parents stuck to their interpretation and advised Ms. Little that if Billy failed, then Mr. Abler, director of special education and secondary education, would hear from their attorney.

Ms. Little was steadfast in her conviction that she had covered herself with the amount of notification that she prepared about the failure consequences. She contacted Mr. Abler directly as a courtesy and explained the situation. She received yet another shock. Mr. Abler told her directly and emphatically that she should change William’s grade and pass him. Taken aback by this response, she asked him numerous questions, including: Did he have any idea what he was doing? Did he understand how his decision would impact the school? Would all the special education students who did not complete the assignment question their teachers? Did he realize how the entire rigor initiative was being undermined?

Mr. Abler abruptly ended the conversation, stating the directive again. Ms. Little’s reply was an emphatic, ―No. Mr. Abler hung up the phone and immediately called Mrs. Stricton, the building principal. Mrs. Stricton summoned Ms. Little to a meeting and advised her to bring an association representative. Ms. Little called Mr. Rogers at once.

Mr. Rogers and Ms. Little had a discussion before the scheduled meeting with the principal. He gave her the usual advice for someone having this type of meeting. He cautioned, ―Don’t say anything. Just listen to what is said, and we will respond later.

The meeting was short and direct. Ms. Little was ordered to change the grade or be disciplined for insubordination and have an unsatisfactory incident letter placed in her file. Instead of remaining silent, Ms. Little blurted, ―I refuse to change his grade. She proceeded to explain why, including the fact that this would undermine the principal’s own initiative. However, Mrs. Stricton was following her orders and was not interested in hearing her comments. She informed Ms. Little that disciplinary proceedings would proceed. She also indicated that whether she did it or not, the grade would be changed.

Mr. Rogers felt he had to say something. He mentioned that he might speak to the superintendent and get him involved in this situation. This enraged Mrs. Stricton, who said that if he broke the chain of command and went over Mr. Abler’s and her head, he would face the same repercussions as Ms. Little. As he left the office with a visibly shaken Ms. Little, Mr. Rogers thought to himself that fortunately, this was a Friday, and he had time to consider this disturbing situation.

*(Please think through this case from the perspective of Mr. Rogers.)*

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**Step 1: Read the case as a group**. Then think deeply about the case and free write/brainstorm (each person does this individually). **(5 minutes)**

**Step 2: Decide how serious things were for each of the three drivers** (Positionality, Cascading, and Stability). (Here the group is divided into threesomes- one each for Positionality, Stability, and Cascading. This will allow everyone to go deeper into each one and report back to the whole group. Please see the gauge below for each of these since this might help you in your thinking things through. (Facilitators and Timekeepers please note: You *are critical here.* Please provide enough time for the threesomes to reflect and then please keep the whole group on task to decide how serious things are for each of the three drivers. Postionality, Cascading and Stability) **(10 minutes)**

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| Severe | Multiple factions are moving towards action |  |
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**Step 3. The whole table decides on a general level of turbulence** (Light, Moderate, Severe, or Extreme) based on your evaluation of the drivers. Please consult the turbulence gauge below. **(5 minutes)**

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**Step 4. Tone down the turbulence or escalate it?** What are the possibilities and implications for toning-down the turbulence? What are the possibilities/implications for escalating the turbulence? (Whole table discussion organized by the facilitator) **(5 minutes)**

**Step 5. Based on the 4 steps above what actions would you advise the teachers association president in your case to take?** Do you all agree? What are alternative points of view?(Whole table discussion organized by the facilitator) **(10 minutes)**

**Case 3 Bomb Threat: Real or Hoax?React or Ignore?**

**Kelly D. Harbaugh**

It was a clear, crisp February morning as Principal Bellini parked her car outside of Dew Valley High School. Although her first year in this administrative position had its share of grueling challenges, the days seemed to pass swiftly. She was energized by the rapid pace and daily chaos of operating a high school with over 900 students, 70 professional staff, and 15 support staff. The suburban community was united behind its schools, and Ms. Bellini was supported by students, parents, and staff. She was the third principal of Dew Valley in as many years, and the school community was looking forward to a fair and consistent leader who would remain with the district for more than one year. Ms. Bellini was passionate about her new position and described herself as a student advocate, first and foremost. She genuinely cared about all students and utilized several means in order to get to know as many of them as possible. As an instructional leader, she strived to raise the academic bar through improved delivery of the curriculum. She realized this would be possible through a united team approach with the staff. In summary, her motto was a quote by John C. Maxwell: ―You can love people without leading them, but you can’t lead people without loving them.‖

The day began as usual. By 9:00 a.m., Ms. Bellini was doing her second walk through the building. Classes were in session and the halls were empty. As she rounded a corner, she noticed a piece of notebook paper on the floor. She casually stooped over to pick up the paper and dispose of it in a nearby trash can. Just by chance, she glanced down at the paper and noticed scribbling that appeared to be words. Upon closer inspection, she read, ―There is a bomb in the building. It’s gonna blow and people will die. You deserve it.

Ms. Bellini hastily folded the piece of paper and headed for her office. Once in her office, she closed the door and reread the note. She responded out loud by saying, ―What do I do now? She had absolutely no experience with this type of situation. Butterflies began to swarm in her stomach. She took a deep breath and told herself to remain calm and composed. As her thought process began, it was as if there were two massive weights on her shoulders. The weight on the right shoulder represented the following thoughts: ―Did anyone else see this note? If not, this can be easy—no one has to know that I saw the note. Therefore, I don’t need to take any further steps but to throw away the note and carry on with the tasks of the day. If someone does report seeing the note, I can still say I never saw it. Because they would not be able to present the note, the situation could be treated as hearsay or rumor. Again, no additional action would be required. Chances are this is just a prank by some class clown, and I’m not going to waste my time on it.

On the left shoulder was an equally heavy weight, which amassed the following thoughts: ―Even if I am the first person besides the true author to view this note, I cannot take the chance of it being a hoax. If something did happen, regardless of how minor, I could never justify to myself or anyone else the decision to ignore the note. I have no professional basis from which to conclude whether the note is real or a prank. Therefore, there is only one correct decision. I should notify the superintendent to discuss our plan of action according to our Crisis Management Plan.

The right shoulder bore down once again and made Ms. Bellini contemplate the effects of reacting to a prank. She thought: ―The author of the note will be given control. The normal flow of the day will be interrupted, if not halted. Students and staff may become angered or scared and the outcome of any plan of action may be disastrous. The media will surely appear and distort everything. Parents will panic and flood the premises. All of these combined would lead to widespread criticism of me and my possible demise.

The left shoulder countered with: ―Chaos, confusion, and fear can be avoided through clear, succinct, and composed communications. Regardless of who I am dealing with, I have to be confident and levelheaded. Students and staff will mirror my reactions. All decisions from this point forward must be based upon the school community’s safety and mental well-being. The media sharks can be kept at bay and fed innocuous tidbits of information until the situation is in our control, and then the media can be my ally. Parents will be informed of the safety and welfare of the students as readily as possible. Teachers and staff have practiced possible plans of actions for bomb threats. These plans are comprehensive and realistic. There will be a team approach throughout the handling of the situation. I will not have to attempt to think of everything or deal with everything on my own. As a school family, we will prevail regardless of whether this note is real or a hoax.

The weight of the left shoulder began to morph into a force as the weight of the right shoulder began to shrink. However, she could not help but continue to have doubts: ignore or react? *(Please take the perspective of Principal Bellini)*

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| Extreme | Structural damage to the institution’s normal operation. |  |

**Step 4. Tone down the turbulence or escalate it?** What are the possibilities and implications for toning-down the turbulence? What are the possibilities/implications for escalating the turbulence? (Whole table discussion organized by the facilitator) **(5 minutes)**

**Step 5. Based on the 4 steps above what actions would you advise the principal in your case to take?** Do you all agree? What are alternative points of view?(Whole table discussion organized by the facilitator) **(10 minutes)**

**References for the cases 2 and 3:**

Catarro, A. (2013) Rigor or rhetoric? Shapiro and Gross. *Ethical educational leadership in turbulent times: (Re)solving moral dilemmas.* 2nd edition. New York: Routledge. Pages 154-158

Harbaugh, K. (2013) Bomb threat: Reality of hoax/react or ignore. Shapiro and Gross. *Ethical educational leadership in turbulent times: (Re)solving moral dilemmas.* 2nd edition. New York: Routledge. Pages 66-69.