Inviting Leadership From a Belfast Bedroom:
Invitational Theory in Contemporary Schools

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Abstract

Educational leadership is challenging, complex, and vitally important to student success. Despite the publication of theories, books, and research on school leadership, a perception of a chasm between theory and practice exists. However, the intentional consideration and implementation of theory can make an enormous impact on practice. This is revealed in this dissertation through the exploration of invitational leadership theory through an autoethnographic study of my leadership journey, as well as the intentionally inviting leadership of Billy Tate, a veteran school principal in Belfast, Northern Ireland. This dissertation uses an amalgamated methodology of interview and observational research embedded within an autoethnography to intimately explore invitational theory in practice through the lens of a new school principal in Southern Ontario and a veteran principal in Belfast. This study provides an intimate understanding of the impact and applicability of invitational educational leadership theory in two unique educational, political, and social contexts and draws conclusions from the consideration of and reflection upon my leadership and Billy Tate’s. This dissertation reveals invitational leadership as a theory of practice that has significantly influenced two very different school leaders and posits that invitational theory is a theory of practice worthy of consideration by educational leaders from around the world.
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This dissertation is dedicated in loving memory to William “Billy” Tate.
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CHAPTER ONE: INTRODUCTION

Educational leadership is challenging, complex and while vitally important to student success, it is often overwhelming to new and existing school leaders. Despite the publication of theories, books, and research on school leadership, a perception of a chasm between theory and practice exists. However, the intentional consideration and implementation of theory can make an enormous impact on practice as revealed by my decision to embrace invitational leadership theory in my practice as a school leader and similarly that of Billy Tate, a veteran school principal in Belfast, Northern Ireland. This study utilizes an amalgamated methodology of interview and observational research embedded within an autoethnography to intimately explore invitational theory in practice through the lens of a new school principal in Southern Ontario and a veteran educational leader in Belfast, Northern Ireland. This dissertation reveals invitational leadership as a theory of practice which has significantly influenced two very different school leaders leading in very unique political and social contexts, therefore illuminating invitational theory as a theory of practice worth considering by educational leaders from around the world.

This dissertation is a first-person reflective look at leading from an inviting perspective which provides a unique voice and distinct perspective to the existing literature. While valuable to understand how inviting leaders are perceived by others, this dissertation takes a look at inviting leadership not from the outside looking in through teacher observations and impressions, but instead from the inside looking out through an autoethnographic lens of my approach to inviting leadership and to that of Billy Tate’s in Northern Ireland. What does invitational leadership theory look like in contemporary schools in unique cultural, social, and political situations?
Understanding the complexities of school leadership and the influence of inviting theory on leadership in contemporary schools has never been explored from the perspective of the leader. This approach to the exploration of this phenomenon is intended to connect with practicing and aspiring school leaders who can relate to the realities of the day to day while considering the influence of theory on that reality. This unique perspective will hopefully open more leaders up not only to what others think about an inviting school and leader, but also how to get there, the bumps along the way, challenges, obstacles, and perseverance.

I chose to explore the influence of invitational leadership theory on school leadership as a result of my experiences as a new school principal. I was unsure of my ability to lead as a new principal and convinced that my competency would be questioned. If I had a solid foundation on which to stand, if I made decisions intentionally and reflected thoughtfully, then I would be able to not only defend my leadership, but also grow as a leader. Invitational theory offered a way for me to be rather than a way to act. The more I learned about inviting leadership theory, the more confident I became as a leader. I began to recognize the immense influence on my leadership and considered the influence that it could have on school leaders, boards, and districts with a wider consideration. Writing this dissertation is a way to continue and further the conversation on invitational leadership theory in the hope that it will be widely considered as a worthwhile theory of practice.

The influence of invitational theory has been explored in dissertations that support the contention that invitational leadership positively impacts school leaders and culture (Asbill, 1994; Beecham, 2009; Burns, 2007; Egley, 1999) as well as equity and social justice (Killingsworth, 2011; Thompson, 2005) which will be explored more fully in the
literature review. However, none have done so through the lens of practicing principals living and leading invitationaly. Moreover, none have done so from the perspective of the principal who has committed to living and leading invitationaly. Other studies have been external impressions. This dissertation provides a unique, intimate exploration of inviting leadership theory in practice.

The focus of this dissertation is on the influence of invitational leadership theory on my practice as a new school principal in Southern Ontario, and the practice of a veteran school principal named Billy Tate in Belfast, Northern Ireland. This first-person autoethnographic study of inviting theory in practice reveals leadership from the inside, through the lens of two school principals living and leading in very different socio-economic, cultural, and political contexts. My school in Southern Ontario is located in one of the more affluent suburbs in Canada while Billy’s school is located in a low-income sectarian Protestant housing estate in traditionally Loyalist East Belfast. This dissertation should be of interest to current and aspiring school leaders, senior leaders and school boards, government agencies such as the Ministry of Education in Ontario, as well as educational leadership scholars, particularly those interested in invitational theory.

This dissertation has the potential to influence these individuals and agencies by revealing inviting theory in practice in two very different contexts. The narrative approach to this autoethnographic study is meant to make the research accessible to more people by exploring invitational leadership theory in practice through stories. The potential to connect more educational leaders with an inviting approach to leadership at best; or a thoughtful connection between theory and practice at least; makes this dissertation an important contribution to the study educational leadership.
The Story of the Story

This exploratory study is a story. In fact, this study is three stories intimately connected, which makes for a fairly unique story within the academy. In many ways a dissertation is always a story as it answers a question worth asking by analyzing research and critically examining the results. This dissertation aspires to more than that.

This study is the story of a young principal entering the profession feeling unsure and ill-equipped to adequately handle both the big picture and the daily realities at the helm of an elementary school in Southern Ontario and how he developed confidence and competency through intentionally living invitational leadership theory. It is the story of a veteran principal in Belfast, Northern Ireland who similarly committed to leading invitationally as the principal of an elementary school in a sectarian housing estate in East Belfast and how his leadership changed the hearts and minds of a historically politically and socially divided community. It is the story of how a unique methodological approach has amalgamated these two stories by utilizing interviews and observational research embedded within an autoethnography.

This dissertation is the exploratory leadership journey as I wonder, wander, and widen. I wonder how I am going to make an impact on my school and community as a new principal. It is through my embracement of invitational theory that my leadership is strengthened and confidence is raised as I commit to living intentionally and doing things on purpose for purposes that can be defended. I wander over to Belfast, Northern Ireland; first in an electronic mentorship relationship with Billy Tate, a veteran school principal similarly committed to living and leading invitationally, and later through my visit to Northern Ireland to visit East Belfast, Billy’s school and staff members, and to sit at Billy’s bedside in the last days of his life. I widen my perspective of leadership as a
result of these experiences and my understanding of the impact and applicability of invitational theory in contemporary schools.

Invitational Leadership

The education system plays an integral role in society as we rely on schools to teach children how to read, write, problem solve, think creatively, get along with others, and eventually contribute to society. Leadership plays such an important role in this process as the principal is integral to shaping the ethos and culture of the school. Billy and I understood that the leader of the school plays a large role in creating a welcoming and supportive environment and a key ingredient is the possession of a dynamic theory of practice, a self-correcting way of thinking about that which is worth doing (Novak & Rocca, 2006). If the principal helps to shape the ethos and culture of the school, who and what help to shape the principal?

Invitational theory (Novak, 1996, 2002; Novak, Rocca, & DiBiase, 2006; Purkey, 1978, 1999, 1991; Purkey & Novak, 1996; Purkey & Siegel, 2003; Purkey, Schmidt, & Novak, 2010) suggests a way to live that starts with a caring core, trust in and respect for others, and optimism for a better future by living and leading intentionally. Invitational leaders recognize that leadership is about relationships and valuing the contributions of all to the collective good of the organization. An invitational leader is someone who recognizes the unique gifts and talents that each person possesses and invites them to utilize and share them with others for the betterment of all. Inviting leaders invite participation and shared leadership by recognizing that each person has value which can contribute to the group and that the sum of the parts is much more than the efforts of the singular (Novak, 2002).
The goal of invitational leadership is to establish an environment that intentionally invites people to realize their full potential (Paxton, 1993). An inviting school which is caring, trusting, respectful, optimistic, and intentional about it all is revealed through the five Ps: people, place, programs, processes, and policies at St. Stephen’s Elementary and East Belfast Primary. Invitational theory encourages others through invitations which Purkey (1978) describes as the process of extending positive messages both to oneself and to others. The ways in which a leader leads and invites others into the process can be seen through the people, the physical space, the programs offered, policies implemented, and the processes in which it all comes together which will be further explored through mine and Billy’s leadership in this study.

Invitational leadership theory sounds like a wonderfully positive and supportive idea but anyone who works in a school, has children in school, or went to school understands that contemporary schools present a plethora of challenges and obstacles on a daily basis. Invitational theory sounds wonderful as a theory, but what does it look like in practice? Can it make an impact on contemporary schools? Is it possible to live and lead invitationally when faced with the realities of schools today and perhaps more importantly; is it worth it? This study’s amalgamated methodology explores these questions by presenting two school leaders, Billy and me, who live and led within very different contexts, who committed to living and leading invitationally, and the impact that decision made on their schools and communities.

Though we began our tenures at St. Stephen’s in Southern Ontario and East Belfast Primary in Belfast, Northern Ireland at very different stages in our careers and in very different social, cultural, and political contexts, Billy Tate and I approached the role with a shared sense of reverence for the importance of the position for schools, students,
and communities. Invitational leadership theory informed our decision making and approach to leadership.

As a new school principal overwhelmed and underprepared for the role, I sought a theoretical approach to leadership which could inform my practice and contribute to my relationship building, decision making, conflict resolution, and goal setting. Experience would eventually bring perspective and invitational theory provided a solid foundation on which to stand which contributed to my approach to people, places, programs, policies, and procedures as I began my tenure.

Billy had years of experience as a successful principal in Armagh and understood how vital school leadership is in a politically divided town. He felt called to move beyond harmony in his own building toward building bridges and inviting peace in the larger community. Knowing what he wanted to do was one thing but how was another. By embracing an invitational approach to his leadership, Billy recognized the importance of working from a caring core and how to be intentional about trusting and respecting others and how to be optimistic often in the bleakest of circumstances.

As inviting theory influenced the leadership of a new, struggling school principal it contributed to the reshaping of a confident experienced mentor. Though leading in unique social, cultural, political, and historical contexts, my reflections on my inviting approach to leadership combined with Billy’s perspective on invitational theory’s influence on his practice and the broader cultural milieu reveal a theory of practice with the potential to influence educational leaders across the globe.

In order to begin to tell this story, I have to start from the start. There is a beginning to every story, and mine began as I transitioned into the role of principal at St. Stephen’s Elementary School in Southern Ontario, Canada.
Arriving at St. Stephen’s

I was lost on my first trip to St. Stephen Elementary School in more ways than one. The voice of the superintendent congratulating me on my promotion to principal on the other end of the telephone was still fresh in my mind as I made wrong turn after wrong turn. I hoped my tenure would not follow a similar path. I was nervous and afraid of the role I was about to take on as the leader of a high profile elementary school in the district. Perhaps a little more than nervous; terrified might have been more accurate. I had been good teacher, in my humble estimation. I enjoyed connecting with students, celebrating their successes large or small, and working in partnership with parents to create community and support our students. I understood curriculum and pedagogy, though recognized how much more I had to learn. I coached teams, directed school plays, and worked on committees. The move to principal, however, would require leadership and expertise beyond any formal training or experiences I possessed. I felt alone, overwhelmed, and underprepared to lead St. Stephen’s Elementary.

The large green trees hung over the road creating a canopy of foliage that wrapped around the community like a familiar blanket. I stopped for directions from a young woman pushing a stroller that might have cost more than my deteriorating car, while her children ran ahead toward the park. After a few twists and turns past large stone properties and parked sport utility vehicles, I found the school nestled on a leafy side street.

When I pulled up for the first time and eased into the designated reserved principal’s parking spot a few meters away from the front entrance of the building I decided immediately that the sign would have to go. I eased the transmission into park, inhaled deeply, and sat back in my seat staring at the school which was now, for better or
worse, subject to my leadership. I had been to the school in the spring to meet with the outgoing principal and was introduced to the staff, but it was sitting in the driver’s seat of a car filled with cardboard boxes and framed paintings and portraits for my new office that the gravity of my new role finally settled in. I took a deep breath and reached for the driver’s-side door.

I had arranged to meet the school’s secretary, who had volunteered to come in that August day to meet me. She had been the school’s secretary for just over twenty-five years and had seen many principals come and go. I left my boxes, files, and photos in the car and made my way inside.

My head was full of ideas, theories, experiences, and plans. I spent the time listening and absorbing as much as I could from her and appreciated the wealth of expertise in the school and community. I had learned the importance of relationships early. I had decided that I was not going to step into the role and simply see what happened. Educational leadership is too important for such an approach. Despite my hesitation and nerves, I mustered up all the confidence I could as I reflected on my experiences to date and my commitment to continue to refine and reflect upon my leadership with humility from an inviting perspective. I committed to being intentional in my approach to creating an Inviting school.

Though I arrived at St. Stephen’s as an inexperienced rookie principal, across the Atlantic Ocean, in Belfast, Northern Ireland, a veteran principal was leading a historically politically and socially divided community in the most inviting of ways. I would meet him electronically at first, and later in person, and the connection that developed influenced my approach to invitational leadership and my community at St. Stephen’s Elementary School.
Connecting with William “Billy” Tate

I was introduced to William “Billy” Tate through my supervisor and mentor Dr. John Novak. Billy had attended a workshop facilitated by Dr. Novak in Northern Ireland and was turned on to the invitational leadership theory as a theory of practice grounded in foundational values that resonated with his approach to leadership. Listening to Dr. Novak speak, he recognized a theory of practice that could inform his leadership and provide a foundation on which to move his community beyond its sectarian past toward an inclusive future.

When Billy was about to travel to London to be made a Member of the British Empire, he reached out to Dr. Novak with an email. He informed Dr. Novak of the recognition he was about to receive, and the influence that his presentation and invitational leadership theory had on his practice as a school principal in Belfast. Dr. Novak replied with congratulations and thanks, before introducing us electronically.

Billy and I began to communicate via email about our shared interest in the Irish rugby team, our regional interests in Ulster Rugby (Billy), and Munster rugby (me), and school leadership. He told me about situations and events at his school in East Belfast, and I shared my struggles and triumphs at St. Stephen’s. He talked about visits from senior inspectors, paramilitary protests, and quiz nights aimed at community building, and I shared stories about visits from the Ministry of Education, challenging situations, and community barbques. I recognized an experienced, inviting leader who was willing to share ideas, opinions, and experiences. I think Billy recognized an eager, optimistic, new leader, interested in learning, reflecting, and refining. A recent rugby match score was usually the impetus for a new email exchange. A mentor/mentee relationship developed across the Atlantic via email.
**East Belfast Primary**

When William “Billy” Tate accepted the principal’s position at East Belfast Primary School in Belfast, Northern Ireland he not only knew exactly how to get there without having to ask for directions, but also the implications of the role as well. He was moving to East Belfast after a celebrated, though contentious, tenure as a principal at a school in a border town in Armagh, where the previous principal had been shot by paramilitaries and staff checked for bombs under the wheel wells of their cars each night before driving home. Situated in a politically divided community, the fact that they welcomed Catholic children into their school in the Protestant part of town, including the children of the warden of the local prison and the children of police officers, meant regular threats to the school and to himself personally. Billy understood when he accepted the position at East Belfast Primary that it would not be like his previous school in Armagh. It would be much worse.

Billy had become used to living and leading within a politically divided community in Armagh. While the town was more Catholic than Protestant, it was still considered a place where both existed within distinct and separate communities. At East Belfast, a staunchly Protestant housing estate in East Belfast, there would be no Catholic influences or infringements on the decisions at the school. Billy could have operated East Belfast Primary in congruence with the traditionally accepted biases and kept it Protestant and perceived Catholic republican interests out of the school. Instead he committed himself to living invitationally in Armagh as this paper reveals in chapter 4, and recognized the East Belfast community as one in which an inviting perspective on school leadership was desperately required.
When he made his way to the school for the first time past neatly maintained window boxes hanging in front of two up two down row houses, he barely noticed the barbed wire fencing surrounding the caged police station in the neighbourhood. It looked like every other police station in Northern Ireland wrapped entirely in a metal protective cage preventing anything or anyone from entering or throwing projectiles over the wall. Broken glass cemented onto the top of brick walls reflected the light breaking through the clouds as Union Jack flags flapped proudly from the front of row houses. Even the curbs painted red, white, and blue in unionist East Belfast blended into the background as long accepted symbols of loyalty to the United Kingdom and rejection of Irish Republican claims to the north of Ireland.

Though situated close to the centre of Belfast on the east side, East Belfast Primary is located in a relatively leafy housing estate amidst the concrete murals and long established dividing lines that run throughout the city. It is a housing estate within a park connected to the city. The park was supposed to be idyllic and peaceful, but only for Protestant loyalists who lived a segregated and isolated existence within.

Billy kept his wits about him when he drove as he always did, carefully noting the characters walking down the street eyeing his vehicle. The young girls pushing prams walked past young men in track suits. Murals depicting the red hand of Ulster, men in balaclavas carrying rifles, and proclamations of pride and refusal to yield to Republican violence or political rhetoric announced the politics of the community. He knew where he was and that outsiders were treated with suspicion. He was used to it all having grown up not too far away in similar circumstances. The battle lines were drawn before he was born and he knew what being Protestant meant in East Belfast and what being Catholic meant in the west of the city. He was amongst his people: fellow loyalist Protestants. He
pulled into the parking lot at East Belfast Primary school, eased the car into the parking spot and stared at the school which was also, for better or worse, subject to his leadership. Billy had seen so much hatred and violence and understood the deep-seeded anger that each community felt toward the other after years of bombings, shootings, murders, and seemingly endless cycles of retribution. The Catholics had lost fathers, Protestants their daughters, Loyalists their mothers, and Republicans their sons to the “Troubles” and Billy witnessed it all first hand. Friends and colleagues, husbands, wives, sons and daughters killed for being the wrong religion in the wrong place at the wrong time. The history of violence stretched years before the Troubles erupted in the late 1960s to the rebellions of the early 1900, and the centuries of struggles between the Irish and British for control of the tiny island. He knew the challenges he would inevitably face and understood that if peace would ever be achieved it would have to start with the children at East Belfast Primary school.

Both Billy and I connected with invitational leadership as a theory of practice. Independently at first and later collaboratively, as we discussed how it influenced our leadership and the communities we were leading. So what is invitational theory and how does it influence school leaders and educational communities?

Socialization and Shock

The transition to the role of principal is a difficult one of immense responsibilities (DiPaola & Tschannen-Moran, 2003) whether in Southern Ontario, Canada, East Belfast Northern Ireland or any other community. As Billy and I found, and as supported by the research below, it is fraught with stress, isolation, role anxiety, and culture shock as a teacher embraces not only instructional leadership, but concurrently managerial, administrative, financial, and supervisory responsibilities (DiPaola & Tschannen-Moran,
Regardless of the circumstances of promotion and political, social, or cultural influences, principals are expected to enter the profession adequately prepared to perform all roles and duties competently in order to support student learning and positively influence school culture and administration. The reality is that many principals are overwhelmed by the position as they struggle with their new role identity (Browne-Ferrigno & Muth, 2006). Many principals, including myself, confess to feeling unprepared for the level of expertise required for mediation, difficult parents, teacher supervision, site and facilities management, administrative tasks, and the time and toll taken on families in the role (Walker, Anderson, Sackney, & Wolfe, 2003). As I sat in the parking spot reserved for me, I contemplated if I was ready to take on the responsibility. Billy Tate shared with me that he experienced familiar reservations about competency and leadership within the context of a community used to segregation, politics, and violence.

Billy and I had participated in the preparation programs meant to equip us academically and practically with the theory and skills required for the position. The general consensus from practicing principals is that these programs, while regarded as necessary, fail to adequately prepare emerging principals for the realities of the role (Daresh & Male, 2000). Practitioners and scholars advocate for on-going mentorship to support transitioning principals with their socialization and competency (Browne-Ferrigno, 2003; Browne-Ferrigno & Muth, 2004, 2006; Chapman, 2005).

While authors continue produce books and articles on forms of enabling, collaborative, moral educational leadership, the impact on practice appears to remain minimal (Zirkel, 2007). A study of the journal preferences of educational administrators and professors highlights the on-going gap between academia and practitioners.
According to the study (Zirkel, 2007) professors overwhelmingly read peer reviewed refereed journals while superintendents read non-refereed practitioner magazines. Non-refereed journals found some overlap but the difference between academe and educators remains. The ongoing difficulty of this situation is that the leaders in academia and educational leadership are “marching to the beat of different drummers” (Zirkel, 2007, p. 588).

This disconnect continues to focus on the concept of relevance. Literature and theory are not being consumed and implemented because of the perception of the lack of application to the reality of daily life in a school. The concept of administrators as scholars, though an admirable pursuit, requires a “leap of faith to conclude that traditional academic frames of scholarship have much application to the world of practice” (Murphy, 2007, p. 853). Murphy (2007) argues that the gap is perpetuated by the lack of practitioners teaching leadership preparation courses at universities and the resulting inapplicability of academic pursuits to the everyday role of a school leader.

The narrative autoethnographic approach to this dissertation recognizes Zirkel’s (2007) assertions by exploring invitational leadership in an accessible way. The stories contained in this study are meant to be enjoyed, reflected upon, and considered from a theory into practice perspective.

Professional and Personal Tensions

I was 33 years old when I pulled into the parking lot and began my tenure as principal. In 2005 the Ontario Principal’s Council Leadership Study reported that the average age of elementary school principals in Ontario was 47.3 years of age (Stone, Parker, & Wood, 2005). I understood that I would not only have to deal with the
immense responsibilities inherent in the role but also with the reality that I was at least 10 years younger than any colleague and 14 years younger than the provincial average.

Not only was my actual age significantly younger than colleagues but I am often told that I look even younger. This affected my self-perception as I began my tenure and influenced my decision to approach the year intentionally from an inviting leadership stance. I could not help but think that my age and deficit in teaching experience in comparison to colleagues would negatively impact my ability to lead the school. I recognized my ability to lead and the faith the board had showed by promoting me to principal and understood that I had skills and an aptitude for leadership that was contingent on my communication, relationships, faith, optimism, respect, and genuine care for staff and students. However despite this recognition, I feared that charm played a role in my promotion to a certain degree and that because of my obvious age that I would be found out as a leader wanting.

I contemplated my new role and my conceptions of what the character of a principal should look and sound like. I considered my suit, haircut, and general disposition and found myself subscribing to anything that would endow me with the perception of authority. These superficial costume considerations attempted to ease my anxiety yet reinforced my “imposter syndrome” (Brookfield, 1995; Clance & Imes, 1978; Ferrari & Thompson, T, 2006; Kumar & Jagacinski, 2006; Leary, Patton, Orlando, & Funk, 2001), a psychological phenomenon in which individuals question their competency and ability to perform their role in relation to the perception of expectations and external impositions. The impostor syndrome is grounded in the fear of failure and a lack of confidence (Kumar & Jagacinski, 2006) and feelings of self-perception have been linked to depression (MacGregor, Gee, & Posey, 2008). Though much of the
research suggests this phenomenon is more prevalent in women than men (Clance & Imes, 1978; Kumar & Jagacinski, 2006), I doubted my competency and wondered if I had been promoted for reasons other than my ability to lead the school.

The turning point for my approach to leadership came as I read *Becoming an Inviting Leader* (Purkey & Siegel, 2003), *Inviting School Success* (Purkey & Novak, 1996), *Inviting Educational Leadership* (Novak, 2002), and *Creating Inviting Schools* (Novak et al., 2006) which explained the theory of invitational leadership. I recognize the simplicity of the explanation for my embracement of invitational theory: I read some books on the subject and was turned onto the theory of practice theoretically and practically. The fact is I was young, overwhelmed, and questioning the wisdom of the hiring panel who had promoted me to principal and was actively searching for something I could connect with, hold on to, and support my leadership. I knew I was going to appear completely out of my element as the principal, therefore I wanted something substantial to inform my decisions, practice, and theoretical approach to school leadership. Reading Purkey, Novak, Siegel, Rocca, and DiBiase turned a light on for me as I recognized the connection between what I brought to the role and what could be accomplished through intentionally caring, trusting, respecting and being optimistic about the future. However, I recognized the congruence between inviting leadership and my own approach in many ways except one. I was missing the aspect of intentionality. Before connecting with invitational theory I was never truly aware of what made me a leader. I recognize and appreciate that I possess a degree of persuasive charm and an oratorical savvy perhaps connected to my cultural background which is explored below. I have a reasonable head on my shoulders and my personality is such that not much fazes me, at least outwardly, so I can appear calm and under control in the most intense
circumstances. However, being the product of a culture of storytellers and an inherited predilection for calm in a storm does not make a complete leader. An invitational perspective rejects any belief that behaviour is the result of unconscious forces, as well as the traditional behaviourist view that behaviour is caused by stimulus, response, reinforcement and reward (Paxton, 1993). Invitational theory suggested the necessity of intentionality to leadership and how a thoughtful and considerate approach can be undertaken when considering all aspects of the organization.

Intentionally considering why, how, when, with whom, and for what reason decisions are made and actions are taken can be accomplished by starting from a caring core, intentionally trusting others to do good things, respecting the contributions of all, and genuinely being optimistic about the future. Invitational theory suggested that despite my perception of my own charm, without intentionality, I would not be able to answer the questions of competence that would inevitably accompany my appointment to the role of principal. My self-doubt fuelled my embracement of invitational theory as I recognized that good things do not happen consistently accidentally. Intentional consideration can be given to the physical environment, interactions with others, the programs and policies of the organization, and the way in which it all comes together. Inviting theory revealed to me the impact of the smallest details and how the impact the biggest of big pictures. Being thoughtful, reflective, considerate, and adaptive would not only support my own reservations, it could change my leadership for the better.

My intention was to have a definitive idea about what I am doing and the direction the school is heading while recognizing that I have a lot more to learn. I approached my role understanding the tensions that would result and reveled in the opportunity to be intentional, considerate, and reflective of my practice in an on-going way. I embraced the
invitational theory of practice for these reasons and began my tenure prepared to make decisions, reflect, and refine. While I connected with invitational theory as I panicked to prepare for taking on the role, Billy Tate grew to embrace invitational theory as his leadership evolved after participating in a leadership session with John Novak in Belfast. When Billy was appointed principal at East Belfast Primary he had been a principal in a tense politically divided community in Northern Ireland bringing with him a wealth of both professional and life experiences. As a successful teacher and leader, Billy’s talents were recognized as he was afforded the opportunity to lead more than the staff and students of East Belfast but the community as well. Having grown up in a Protestant loyalist home and community, he seemed like a natural fit for East Belfast as a leader who would ease into the role and the community and maintain the status quo politically and socially. Billy, however, had other plans.

Having grown up through the height of the Troubles and being inundated with political rhetoric, religious doctrine, and the ever-present reality of violence, Billy committed to move beyond the established norm into uncharted territory. The realities of school leadership present a multitude of challenges, tensions, anxieties, and turmoil in any situation which he embraced. It was his commitment to the building of peace, promoting equity and social justice through the children of East Belfast and the larger community that added even more to the tremendous responsibilities he inherited by simply accepting the post. He did not want to transition into the role and maintain the status quo. Instead he committed to creating an inviting school amidst the political, social, cultural, and religious divisions at East Belfast Primary School.
Irish Perspectives

Upbringing influences perspectives and approaches as cultural norms are passed on from generation to generation. I recognize the influence of my family and cultural background, as well as that of my wife’s, to my approach to leadership, reflection, and this dissertation. I grew up in an Irish-Catholic family from the south of Ireland and spent most summers of my life on the family farm on the west coast in County Clare doing the hay, cutting and drying the turf, and taking the cattle to market and milk to the dairy. Days involved making trams in the fields and butter sandwiches with tea against the hay stacks while evenings were spent around the fireplace in the kitchen or enjoying a pint and conversation in the pub in the village as I got older. My grandparents told rebel stories with reverence and we heard about the Black and Tans, the local hiding places, republican political candidates, and the glory of the idea of a united Ireland.

My wife was born in Belfast, Northern Ireland and raised in a Northern Irish Protestant family amidst the reality of The Troubles in the early 1970s. She remembers the hum of helicopters patrolling the skies, tanks rolling down the street, and stories of the reality of violence from her father who was a medical resident at the city hospital with the dubious distinction of being the preeminent location in the world to study gunshot wounds and bomb blasts. Though the realities of the streets of Belfast and the impact on the hospital’s emergency room was largely shielded from my wife and her younger sister, the violence in the city and throughout the north of Ireland during The Troubles influenced her parents actions and ultimately their decision to leave Northern Ireland for Canada.

Though geographically the island is small, the realities of the experiences could not be more distinct from the rural southern farm to the urban northern streets of Belfast.
These unique experiences provide important perspectives on the history of the island, The Troubles, political, and social realities.

As a school principal, I understand the immense impact I have on the culture of the school, staff, and students, and appreciate the importance of the contribution of education to each new generation. Billy Tate similarly embraced this commitment to positive influence on students and affecting social change through his students. Education has the potential to impact students intellectually, emotionally, and culturally in Southern Ontario and Belfast, Northern Ireland. I understand the impact of invitational theory on school leadership within my own school and have developed a deep interest in understanding more about the theory of practice in a place with such cultural and personal connections for my family in Northern Ireland.

Theory can make an impact on practice as educators reflect upon and refine both “in” practice in an on-going way and “on” practice from a reflective perspective (Schon, 1983). It is the intentional reflection on invitational theory and the sharing of those reflections which contributes to school leadership. If invitational leadership as a theory of practice can make a significant impact on the staff, students, and community in a small school in Southern Ontario and at East Belfast Primary in Northern Ireland, it should be considered a theory of practice of educational leadership worthy of wider consideration by the educational leadership community as having the potential to make a positive impact on schools, educational leadership, and student learning.

This amalgamated methodology of autoethnography, interview, and observation considers invitational leadership theory through my reflections and experiences as a school principal, as well as those of Billy Tate in Belfast to reveal a unique mentor/mentee relationship rooted in invitational leadership theory, mutual admiration, a
willingness to listen and learn, and a commitment to student, staff, and community
development. This study reveals the implications and the extent to which this approach to
educational leadership can impact and influence school leaders and their school communities.

The Roadmap

Like any good story, this one meanders through tales of struggle and conflict, trials and triumph, sadness and celebration without losing the linear focus of an academic paper. Set up like a traditional dissertation, there are five chapters through which the stories are revealed.

The intention of this first chapter is to set up the stories by introducing the two characters, Billy and I, and the unique settings and contexts in which we began our careers as principals. The relevance of school leadership and the influence of theory on practice is explored. Chapter 1 has also highlighted the personal connections I not only have with school leadership, but also with the Republic of Ireland through my family, and Northern Ireland through my wife.

The second chapter is, as it is in most dissertations, an examination of the literature on school leadership and more specifically, on invitational theory, invitational leadership, and mentorship for educational leadership. Administrative theory and educational leadership are presented and discussed through the theories and scholars who appear to be the most prevalent and influential on practice here in Ontario. Connections and division with invitational theory is presented and discussed. Important contextual information about the history and politics of Northern Ireland and the on-going influence on social norms is also presented in this chapter. A brief history of the island of Ireland as a whole, how it became divided, and the influence on the people of Northern Ireland
specifically is presented in a brief historical overview in this chapter as well. This information is meant to illuminate for the reader the historical, political, and social context in which Billy Tate was living and leading East Belfast Primary School. The literature review considers the published literature on school leadership, invitational theory, and dissertations defended on inviting theory as a way to provide background on educational leadership and inviting theory, and set this dissertation up to build upon and further the existing literature.

The third chapter makes sense of the amalgamated methodology that this paper utilizes. An author is always trying to determine the best way to tell a story. When considering the appropriate methodology for this dissertation, a personal and intimate look at my own leadership seemed like a unique opportunity to explore the impact of invitational theory on practice. Much of the published literature and defended dissertations on invitational leadership theory use surveys, observational data, and teacher perception to draw conclusions. An autoethnographic approach to the exploration of inviting theory in practice offers a unique view from the inside of inviting theory and invitational schools. I am in a unique position to conduct the research as a school principal and recognize that this autoethnographic study is a unique approach to the exploration of inviting theory in practice. It is also arguably a more accessible form of research as it utilizes narrative to explore autoethnographically. As such, it has the potential to connect with more school leaders and policy makers. I was introduced to Billy Tate during this time and developed a mentee/mentor relationship with him as he shared the fact that his embracement of invitational theory had significantly impacted his leadership in a very challenging circumstance. His story strengthened mine as it confirmed everything I was trying to prove by looking at my own. I travelled to Belfast
to meet Billy and his staff and in doing so conducted interviews and observational research in the process. However, instead of being an objective third person observer, I was intimately involved as a fellow school leader and my approach to leadership was validated and strengthened through my connection to Billy and journey to Northern Ireland. This chapter explains how the interviews and observations from Northern Ireland and Southern Ontario are embedded within this autoethnography. The third chapter also attempts to address potential criticism of this research methodology by providing methodological support and addressing potential ethical concerns.

The fourth chapter tells the story. The autoethnography begins with my baptism by fire as a new principal and explores my journey as a naïve and unsure leader growing and learning through an inviting lens, reflecting and refining along the way. The story follows me to Belfast Northern Ireland; to a Protestant loyalist housing estate which should have been one of the more uninviting places on earth where I was welcomed by a community of staff, students, and parents in an inviting school where someone from outside the community might not be able to imagine an inviting school there. The story also reveals the personal and professional leadership of Billy Tate as I sat at his bedside in his home in the final days of his life. The chapter then explores the influence of my connection and visit with Billy Tate and the real impact it made on my leadership upon my return home. It clarifies invitational theory in practice through the lens and experiences of two different school leaders leading in very unique and complex circumstances. It is through these very different experiences that the universal applicability of invitational theory is most brightly illuminated.

The fifth chapter brings the story back together as boy wonder has wondered, wandered, and ultimately, widened. The critical look backward points the way forward
for educational leaders interested in finding out more about invitational theory and from a bigger perspective; how theory can and does make a significant impact on the practice of considerate leaders committed to living and leading thoughtfully and reflectively.
CHAPTER TWO: REVIEW OF THE LITERATURE

A review of the literature reveals leadership to be an area of significant interest to scholars in many disciplines including organizational theory, administrative theory, business, and education. This review of the literature begins by situating this study within the context of leadership studies by briefly examining the traditional concept of the attributes of leaders. Despite the persistence of the concept of traditional leadership, educational leadership literature tends to dismiss traditional leadership archetypes of the autonomous decision maker and embraces leadership that encourages the contributions of all within the organization. While rejecting these traditionally accepted leadership norms, educational administrative theory seems to break into two predominant theoretical camps. The first and perhaps most widely accepted within and influential upon contemporary school boards here in Ontario suggests leaders who are engaged, charismatic, and leading the charge educationally while eschewing former traditional managerial notions of leadership. These theories suggest a top down, organizational approach to educational leadership. Scholarly proponents of this approach to educational leadership include Fullan, Leithwood, and Jantzi. Based on my experience within the school system in Ontario, these scholars are the most widely cited and influential and their theories appear to have the most direct influence on our approach to education and educational leadership here in Ontario.

The second theoretical camp includes educational leadership scholars who tend to reject a top down approach to leadership and eschew any notion that suggests running a school like a business. These theories include a consideration of leadership from a servant, ethical, and moral perspective and recognize the importance of relationships and
humility as well as personal will and conviction. These scholars include Ryan, Greenleaf, Sergiovanni, Starratt, and Duignan among others.

These educational leadership theories are presented and discussed using this distinction as a way to situate this dissertation in the wider body of research. These contemporary theories of leadership have many points of convergence with invitational theory yet differ in unique ways which is discussed with each theory. The contemporary theories presented in this literature review appear to be the most widely influential based on the literature and influence on school boards’ leadership policies as noted through school board citations and references. As a practicing school principal, I have certainly become familiar with leadership theories such as transformational, change, constructivist, instructional, servant, ethical, moral, and inviting at principal meetings, conferences, and improvement planning meetings. These contemporary theories are explored and considered as they appear to have the most influence and credibility within school boards today. Not only does this overview of contemporary leadership theories situate this study of invitational leadership, it may also provide clarity for those considering educational leadership theories. Emerging school leaders may find themselves overwhelmed by the literature available which is meant to support and exert influence over approaches to leadership. This literature review acknowledges the variety of leadership perspectives before focusing on invitational leadership theory specifically.

A more in-depth look at invitational leadership as an evolving theory of practice which offers a viable and exciting alternative to the theories presented in this review of literature is the focus of the next section of this literature review. Inviting theory as an evolving theory of practice, unabashedly borrows the very best from these theories while offering a unique and comprehensive alternative. Scholars and practitioners’ published
work on invitational theory from around the world reveals a theory of practice that
heavily influenced my leadership as a principal and that of Billy Tate in Belfast. The
literature on the impact of mentorship on educational leaders supports the relationship I
developed with Billy Tate and the contribution of that relationship to my leadership as a
school principal. Invitational theory within the academy is then explored through a
review of the published dissertations which have been successfully defended throughout
the world. The contributions of these successful dissertations is considered and discussed
as they provide a solid foundation within the academy on which this dissertation stands
and extends the conversation on invitational leadership theory. As an autoethnographic
exploration of school leadership, invitational theory plays a large role in the consideration
of theory on practice and the applicability in contemporary schools.

**Traditional Leadership—Setting the Leadership Context**

I became used to comments such as “you don’t look like a principal” early in my
career as a vice-principal and principal. I received the comment in various forms so often
that I began to recognize that the concept of traditional leadership does exist, is accepted
by a wide cross section of the population based on the variety of sources of the comment,
and that apparently I did not appear to be one.

Based on the comments that I received, the accepted archetypal leader was strong
willed forceful, decisive, and singularly focused and driven. Thomas Sergiovanni (2007)
describes this widely accepted archetype of a school leader when he wrote that “official
values of management lead us to believe that leaders are characters who single handedly
pull and push organizational members forward by the force of personality, bureaucratic
clout, and political know how” (p. 75). According to Sergiovanni (2007), traditionally
accepted notions of leadership supposed that leaders must be forceful, have vision, and
“successfully manipulate events and people, so that vision becomes reality” (p.76).

Sergiovanni (2007) further suggests that the media continue this traditional archetype by portraying leaders as “strong, mysterious, aloof, wise, and all-powerful” (p. 81). These commonly accepted notions of leadership that Sergiovanni refers to is rooted in long held beliefs and assumptions as noted by social scientists and scholars, and has evolved to include oratorical skill, theatrical savvy, and charisma which continue day. Though educational leadership suggests a more collaborative, organizationally focused servant leader, cultural and social norms of leaders persist and continue to influence public perception of leadership qualities. Before exploring educational leadership theories and invitational leadership specifically, a consideration of long-held and socially accepted leadership norms as referenced by Sergiovanni (2007) sets educational leadership within the larger context.

**Traditionally Accepted Norms of Leadership**

These conceptions of leadership are referred to as traditional because they have their roots in centuries of upheaval, war, violence, and subjugation which celebrated power and might as leadership qualities over thoughtfulness, cohesion, and collaboration. For example, Thomas Hobbes’s (1981) *Leviathan* presented power as a precondition of social order and peace. He speculated on the formation of society and the necessity of the emergence of powerful autocratic leadership. According to Hobbes, the natural state for man [sic] is one in which they find themselves engaged in war of every man [sic] against every man [sic] therefore the most important condition that makes society possible is the common power to fear (Hobbes, 1981). Fear is the genesis of community and what ultimately brings the formation of a social contract, keeping society from constant war.
According to Hobbes’s *Leviathan*, leadership is strong, forceful, and necessary to prevent men [sic] from being in a constant state of war.

While Hobbes postulated that the natural state of humans is to be at war and the entrance into a social contract as being the only way to prevent constant aggression, French theorist Jean Jacques Rousseau theorized that our natural state is not so combative. Rousseau proposed releasing the “chains” of society by uniting individuals with others, thus remaining free and equal (Zeitlin, 1990). This is the solution Rousseau proposes in his social contract.

Rousseau believed that Hobbes is wrong to assume that we made society and submitted to strong central power to escape war in nature. In the social contract, we attempt to prevent war and increase equality by subjugating to strong, authoritative leadership to protect all members of society. Man [sic] gives himself to the general will and in doing so, is therefore free. Man [sic] is born free, and everywhere else he is in chains (Rousseau, 1993).

Even within the social contract, Rousseau still recognizes the necessity of leadership for sustained success. He appears to have believed in the new society in which he theorized would have to wait for some charismatic figure to emerge in an unpredictable way, or even possibly by accident, to ensure success (Zeitlin, 1990). In order for the equality and freedom inherent within the social contract, Rousseau still feels that the charismatic leader is necessary, though it is Weber who takes the concept of charismatic leadership further.

German sociologist Max Weber theorized on leadership using the figure of a charismatic leader from whom authority results from the personal appeal of the individual (Ashley & Orenstein, 2000). The Greek word charisma means divine gift. Charisma,
according to Weber, means a gift of grace taking the word from the vocabulary of early Christianity (Roberts, 1997). In theology, grace is the unmerited favour of God, something divinely given rather than earned (Roberts, 1997). A charismatic leader, according to Weber, will be someone who possesses personal qualities set apart from ordinary men, regarded as divine in origin, and on that basis is treated as a leader (Roberts, 1997).

Leadership, in a charismatic sense, is a calling rather than a job. Charisma cannot be taught, learned, or acquired but can only be tested for like a Jedi Knight or Neo from The Matrix. A charismatic leader is likely to emerge during crisis and will appear to have supernatural or superhuman powers and whose mission appears revolutionary (Ashley & Orenstein, 2000).

The leadership qualities of the charismatic leader are tied directly to the individual. However, if the programs of the charismatic leader are to be maintained, rules and routines need to be organized to ensure the leaders’ programs are sustained (Ashley & Orenstein, 2000). This is the birth of bureaucracy.

One of the reasons for Weber’s interest in charismatic authority is his belief that even in the most bureaucratic societies, there will always be a place for charismatic leaders (Ashley & Orenstein, 2000). Weber would classify leaders such as John F. Kennedy and Pierre Elliott Trudeau as charismatic, appearing confident and intelligent, offering swagger and eloquence to an adoring public. Weber argues that society needs leaders such as these to sustain the attention and confidence of the masses.

Weber believed that leadership within society is inevitable and that all attempts to abolish the domination of a few individuals over the many were utopian (Ashley &
Orenstein, 2000). The role of the charismatic leader is to counter the dead weight of bureaucracy in political life (Ashley & Orenstein, 2000).

The archetypal leader is one who displays strong, autocratic authority, combined with personal qualities such as charisma and oratorical ability. This traditional concept of leadership persists to some extent, as revealed by the many comments I received as a young principal. With every comment that I did not appear to be a traditional leader, I began to appreciate the compliment as I recognize that my leadership style being more congruent with educational leadership theorists did not fit the traditional mold.

**Contemporary Leadership Perspectives**

As society evolved and the threat of war and violence, though present, was no longer pervasive, leadership continued to embrace some traditional qualities while recognizing the importance of inspiration and collaboration in leaders. Leadership became more about the cultivation of image as important along with oratorical skills and theatrical savvy. Orson Wells once called Franklin D. Roosevelt the second best actor in America (as cited in Greenstein, 2001). Each time a leader appears in a public forum there is always an element of acting or at least an element of calculated performance. In a study by Howell and Frost (1989) trained actors were asked to verbally and non-verbally exhibit behaviours identified as charismatic versus structuring and considerate. They found that charismatic leaders voiced overarching goals, communicated high performance expectations to followers, and exhibited confidence in followers’ abilities to meet those expectations (Howell & Frost, 1989). Gardiner and Alvolino’s (1998) assertion is that charismatic leadership is an impression management process enacted theatrically in acts of framing, scripting, staging, and performing. Each theatrical part plays an equally vital role in the overall performance and perception of potential leaders.
Leaders as heroes also continue to inform public perceptions of desirable leadership qualities. A study by Joseph Badaracco (2001) found a preference for heroic leaders who are moral, noble, principled and willing to sacrifice themselves for the higher cause (Badaracco, 2001). Heroic leaders appear in most cultures and in almost every era. Popular books, movies, and games have action heroes with heroic individuals at their core however the suggestion that heroic leadership is synonymous with moral leadership confuses courage with ethics (Badaracco, 2001). Badaracco faults the heroic model in two ways: first, it offers little or no guidance to people leading everyday lives suggesting if you are not heroic, you cannot lead. Second, the model offers very circumscribed descriptors of what leaders actually do. Heroic leadership focuses on greatness rather than the individual steps involved in effective leadership over time and discourages aspiring leaders by presenting a somewhat unattainable leadership model.

Contemporary leadership norms remain influenced by traditional notions of leadership and have grown to include theatrical savvy and a preference for heroic leaders who step to the forefront in challenging times. These norms are perpetuated by popular culture as action heroes are lauded and educational leaders are often depicted as bureaucratic, boring disciplinarians. While the teacher is the creative, intelligent inspiration to students, the principal is often depicted as the autocratic re-enforcer of the rules. When new parents come to my office they will often tell their child that they should never end up in the principal’s office. Images of Edward R. Rooney from the movie Ferris Bueller’s Day Off are conjured every time a parent makes that assumption of school leadership. Educational leadership is, however, so much more and so much better than these traditionally accepted and culturally perpetuated norms. Educational leadership theories evolved in opposition to this norm as Sergiovanni (2007) points out,
dominant strategies, as opposed to supporting ones, can breed dependency in teachers and create definitive distinction between leader and subordinates.

Leaders have an enormous impact on students and student success, second only to the classroom teacher (Leithwood and Jantzi, 2000), and influence everything from the day to day to the big picture in schools around the world. It is little wonder then that educational leadership continues to receive so much attention from scholars and practitioners, suggesting leadership that challenges these cultural norms.

**Educational Leadership Theories**

The proliferation of academic research on educational leadership is evidence of the intense interest in supporting leadership for school success. While many exist within public administration theory, this dissertation is an autoethnography focused on the leadership of a principal in Southern Ontario. As a result, the focus of this literature review is on educational theorists who and theories that have received the most attention in Ontario and have had the most influence on the policies of the Ministry of Education, school boards and contemporary schools. As a school principal, I rarely attend a principals’ meeting or a conference without the speaker referencing Kenneth Leithwood or Michael Fullan. The only other scholars consistently referenced by the Ministry of Education and at principals’ meetings and conferences that will not be looked at in this literature review is the work of Stephen Katz and Lorena Earl (2006) and Marzano (2005). Though heavily referenced in contemporary educational contexts, Katz and Earl’s work on data driven decision making is very popular within our publicly accountable school systems though data leadership is too narrow a focus for this study on leadership, while Marzano’s focus is on teacher competency, classroom management, and translating research into practice from a classroom perspective. These theories and
theorists are cited as support for projects, proposals, and initiatives so often that their reference on a project is like a stamp of approval within the school system, particularly here in Ontario. It is important to consider why this is the case in Ontario.

**Educational Reform in Ontario and Theories to Support the Change**

In the 1990s, educational reform was well underway under the New Democratic Party and the leadership of Premier Bob Rae (Anderson & Jaafar 2003). The curriculum was largely governed locally until this point by individual school boards governed by local boards of trustees. In 1993, a common curriculum was introduced by the NDP government. Students were expected to attain a common set of specified learning outcomes by the end of grade 3 and 6 based on defined provincial standards (Anderson & Jaafar, 2003).

In 1995, Mike Harris became the Premier of Ontario, sweeping into power on a wave of conservative reform he called the *Common Sense Revolution*. A brief document with the same title outlined the philosophical goals of the new government. While not specifically focused on education, this document outlined the government being reduce government bureaucracy, cut spending, reduce the deficit, cut taxes, and increase accountability in the public sector (Anderson & Jaafar, 2003). Harris’s policies quickly acted upon these goals by the introduction of Bill 30 in 1996 which established the Education Quality and Accountability Office. The annual grade 3 and 6 EQAO testing was born in Ontario. Though the Harris government’s introduction of standardized testing was both a logical extension of the NDP’s implementation of the common curriculum in congruence with their official policy of increased public accountability, it also built upon previous Liberal government policies. In 1987, Adam Radwanski published a policy document calling for Ontario to adapt global benchmarks for education to measure
student achievement as a measure of global economic competitiveness in education (O’Sullivan, 1999). Radwanski’s report prioritized the government’s commitment to an education system that was focused on educating students for the workforce and new global economy (O’Sullivan, 1999).

These changes in public education in the early to mid-1990s meant significant changes in curriculum, teaching, and approaches to leadership. Educational leaders, once considered more managerial, were called upon to implement these changes to educational policy while being held accountable for student success as increasingly measured by the annual EQAO testing. While the government increased centralized control of education through the common curriculum, the establishment of the College of Teachers in 1996, and standardized testing, school leaders were called upon to implement at the local level the policies.

The leadership theories which gained the most traction during this time shared congruencies with the official policies of the government in that they suggested top down, centralized leadership, in order to lead teachers and students in the new educational reality. Theories such as transformational leadership, change leadership, instructional leadership, and constructivist leadership embrace a business model approach to change in the school system. They appear to if not embrace then accept the realities of the move toward public accountability and standardized testing and suggest leadership that will work within this system, leadership which will lead toward increased teacher capacity and improved test scores. Within the Ministry of Education, the embracing of theories and theorists whose work promotes leadership that supports and builds upon the official policies of the Ministry of Education seems to make perfect logical sense. As a result, these theories of educational leadership seem to be the most prevalent and influential on
practice and official policy in Ontario through the Ministry of Education and school boards themselves.

A smaller but still relevant consideration is the political influence of these theorists, Fullan particularly, on government policy. Michael Fullan has enjoyed a close relationship with the Ministry of Education and particularly with the outgoing Premier of Ontario, Dalton McGuinty.

For these reasons, these theories continue to influence policies, practices, and decision making in Ontario. For an autoethnographic exploration of educational leadership in Ontario, the consideration of these theories and theorists is essential.

**Educational Leadership Rooted in Living Educationally**

Though less referenced provincially but still influential on leadership theory and practicing leaders in contemporary educational leadership, Thomas Sergiovanni and Robert Starratt are similarly referenced when conversation and initiatives move from external strategies to self-perception and self-aware leadership.

Within the Catholic school board in which I work, Servant Leadership is so valued and prevalent that candidates for leadership positions have to demonstrate a commitment to servant leadership style. James Ryan’s (2006) work on inclusive leadership is similarly having an impact on leadership in Ontario by recognizing the influence of leadership on not only student success, but concurrently on issues of equity and social justice.

As further explanation for the exploration of the theories in this dissertation, Brent Davies’s (2009) book *The Essentials of School Leadership* cites many of these scholars and their theories as the definitive overview of the most relevant and applicable educational leadership theories in contemporary schools. This overview of contemporary
educational leadership theories will include transformational leadership, change leadership, constructivist leadership, instructional leadership, entrepreneurial leadership, servant leadership, inclusive leadership ethical leadership, and moral leadership. While each theory will briefly be explored connections to and points of divergence with invitational leadership theory will presented and discussed. While invitational leadership theory has much in common with many of contemporary educational leadership theories as revealed below, it yet is unique in its big picture approach to leadership from the inside out.

**Camp 1: The Leader, the Organization, and the Business Model**

While seeking to influence change in approaches to educational leadership from managerial to a focus on student learning and student success, theories which suggested strong, hands-on leadership focused on instruction and learning emerged. Promoted by scholars such as Leithwood and Fullan, these theories became influential within the Ministry of Education as scholars such as Fullan in particular became intimately involved in the government and policy development within the Ministry of Education at a time when the public’s appetite for higher accountability supported the implementation of standardized testing and measurements of student learning and perhaps more importantly of school, teacher, and principal performance. While the “Common Sense Revolution” of the conservative government of Mike Harris in the 1990s swept into office on a wave of educational reform based on increased scrutiny and accountability, the theories of Leithwood and Fullan in particular were embraced as ways for leaders to lead, influence change, and successfully navigate the reality of this approach to education. These theories and scholars, which continue to inform policy and practice in Ontario, are the focus of the discussion below.
Transformational Leadership

Transformational leadership is an appropriate theory to start with when considering contemporary theories because it evolved in the 1980s in reaction to the commonly accepted transactional leadership. Transactional leadership simply involves the transaction between the leader and follower meaning that if the follower does something, they will receive something in return. From a pre-1980s perspective, this meant that in exchange for work, a steady and stable job and pay cheque is provided. Loyalty was based on a job for life and security which was challenged as companies began to let people go during tough times (Leithwood & Jantzi, 2009). This resulted in a demoralizing time in education. Commitment could no longer be assumed and secured by the social contract. Transformational leadership transformed schools and leadership by focusing restructuring toward decentralization and site-based management and decision making (Leithwood & Jantzi, 2009). Bernard Bass (1985), academic and leadership theorist focused on business models and organizational efficiencies, published Leadership and Performance in the 1980s which suggested four categories of transformational leadership: charisma (practices that arouse strong emotions), inspirational (appealing vision and modeling to support it), individualized consideration (consideration and support of individuals), and intellectual stimulation (awareness of problems and encourage others to think about it).

Public accountability measures have brought about more transactional forms of leadership Leithwood (2007) argues where transformational leadership would actually work better to support the goals of these accountability measures. Transformational assumes capacity to be the key to change as it offers intrinsic incentives for success.
Transformational leadership assumes that the central focus of leadership ought to be commitments and capacities of the organizational members which represent the transcendence of self-interest by both leader and lead (Leithwood & Jantzi, 2000). The emphasis is on emotions and values as fostering capacity development will lead to greater productivity and commitment (Leithwood & Jantzi, 2009). The notion of transformational leadership can be described as the ability of a person to reach others in order to raise human consciousness, build meaning, and inspire human intent (Leithwood, 2000). In opposition to transactional leadership in which all direction and initiative come from the leader, transformational leadership is distributed throughout the organization.

There is no need for a “great man/woman” or a heroic leader as transformational leaders appeal to personal goals and values of individuals. According to Leithwood (2009), transformational leadership is not dependent on charisma, it assumes wide distribution of roles and functions, focused on building capacity more so than motivation, takes opportunities for collaborative work, connects management and leadership, as well as community members and the school.

This model of leadership describes seven dimensions: building school vision; establishing school goals; providing intellectual stimulation; offering individualized support; modeling best practice and important organizational values; demonstrating high performance expectations; creating a productive school culture; and developing structures to foster participation in school decisions (Leithwood & Jantzi, 2000). Literature on this model of educational leadership suggests evidence that transformational leadership contributes to organizational learning and the development of a productive school climate (Leithwood & Jantzi, 2000). Douglas Reeves (2007), in his book *The Daily Disciplines of Leadership*, reveals research that connects high-achieving schools in terms of
academics and standardized assessments can be directly connected to school climate and culture. Reeves found that successful schools have a high degree of extra-curricular activities in a wide variety of disciplines, students feel safe at school, and there is a general sense of well-being in the school (Reeves, 2007). These cultural elements, according to Reeves, are what contribute to academic excellence in schools.

Transformational leadership has many points of connection with invitational theory on a basic level. The importance of the talents and commitment of the all to the organization and capacity building connect with the democratic ethos of invitational leadership and the perceptual tradition. Collaboration and the distribution of leadership, while a radical transformation from transactional leadership, also connect with inviting theory as invitational leadership invite others to participate in the life and leadership of the school.

Transformational leadership, however, seems like a theory more connected to time and place and less relevant in contemporary schools. While restricting leadership from transactional to transformational may have been radical in the 1980s, we have moved well beyond transactional leadership. The transformational approach to leadership, while attempting to distance itself from traditional and transactional leadership, continues to promote the importance of the leader as the dynamic force of change. This approach can also be considered in relation to a business model because the goals appear to be in support of successful leadership for accountability standards. To lead this way is to do well on the test. Being this outcome focused makes transformational leadership appear more manipulative of the hoped for outcomes of standardized measurements rather than a leader, teacher, and student focused approach to educational leadership. Transformational leadership suggests a radical way to lead when
considering traditional leadership, but an inviting approach goes much further than suggesting a radical move from the past toward foundational values which can be identified and considered through the lens of the five Ps.

**Change Leadership**

One of the more widely referenced educational scholars is Michael Fullan. Anecdotally, there seems to hardly be a program or initiative championed by the Ministry of Education that does not have the endorsement of Fullan or uses Fullan’s research to support the goals and objectives. As a theorist who has such a large impact on educational policy in Ontario and around the world, it is important to consider his work on leadership and points of congruence and divergence from invitational theory.

Much of Fullan’s work on educational leadership has focused on change at the school level (2001) and system level (2010). His work articulates a style of leadership that embraces, utilizes, and leads for change. According to Fullan (2001), leaders need to always be learning in order to effectively lead and can not only adapt to change but can lead by operating under complex and ever-changing conditions. Basing his work on change on Kotter’s (1996) 8-step process for change, Fullan argues that leaders must possess five components in order to be leaders for change. They must possess a moral purpose, understand the change process, foster, develop, and respect relationships, create knowledge, share it with others and be the creators of coherence (Fullan, 2001). These five qualities should work in congruence with one another. According to Fullan and Sharrett (2007), change can be led, and it is leadership that makes the difference.

Fullan’s work appears to appreciate lists with his own and the work he cites from others. In Goleman’s (2000) “Leadership That Gets Results,” six styles of leadership are identified: coercive, authoritative, affiliative, democratic, pace-setting, and coaching.
Fullan and Sharrett (2007) suggests that leaders who master four or more, especially authoritative, democratic, affiliative, and coaching, develop the best climate and perform best.

When leadership conducts itself both ethically and morally in both words and visible deeds those being lead feel that they are part of something they can believe in (Fullan, 2001). Fullan (2001) makes the connection between intelligence and emotional savvy by suggesting that leaders must combine intellectual brilliance with emotional intelligence. Being a leader means possessing the ability to create coherence even during times of upheaval.

Fullan continues his own notion of change leadership through motion leadership. For Fullan, the idea of motion leadership involves helping leaders to move individuals, institutions and whole systems forward in a positive way and managing and embracing the intricate challenges inherent within the chance process. Fullan takes a decidedly practical approach by suggesting eight elements: change problems, change itself, connecting peers with purpose, capacity building trumps judgmentalism, learning is the work, transparency, love, trust, resistance, and leadership for all with an eye toward increasing leadership knowledge rather than providing tips and strategies for practicing and aspiring leaders (Fullan, 2010).

A motion leader understands that relationships matter so much that little can be accomplished without establishing positive relationships and trust. His approach resembles an invitational approach to school leadership by trusting in the integrity and competency of others as Fullan claims trust strengthens moral commitment and shared purpose in the face of resistance. While some will embrace change and commit to new ideas, others will prefer the safety of the status quo and will oppose change. This is where
Fullan’s approach most aligns with an invitational approach by optimistically encouraging hope for the future by trusting the integrity and competency of others.

Fullan’s work on educational leadership and change focuses on the change process, assuming that change is necessary in all leadership situations. Change for change’s sake rather than the consideration of the needs of the community, goals, and ideals is Fullan’s focus. In this sense, his work on change leadership is more about how to change, how to implement and process or a plan, rather than how to lead. Change leadership suggests how to act and in some ways, how to effectively manage or manipulate, rather than an invitational perspective which would suggest less how to act and more how to be. Fullan provides checklists for consideration of situations while inviting leadership provides a more comprehensive consideration for the pursuit of educational living.

**Instructional Leadership**

Instructional leadership is another buzz term in contemporary education and is used frequently by Ministry of Education and the Education Quality and Accountability Office when referring to leadership that is rooted in student learning rather than management. In this regard, it is distinct from instructional leadership which has its modern roots in the 1970s and 1980s effective school movements which sought to limit autonomy in schools and fuzzy educational thinking (Leithwood, 2007). In a contemporary context, instructional leadership is used to make the distinction between traditional, transactional leadership and leadership which is less managerial and more focused on the business of student learning and getting involved in the nitty gritty of classroom dynamics, instruction, and realities.
The instructional leader is regarded as a strong, hands-on leader, heroic individual who is singularly committed to teacher accountability and instruction in the classroom, suggesting an element of control (Leithwood, 2007). Hallinger (2000) identifies three instructional leadership practices: communicating the school’s goals, managing the instructional program, and promoting a positive school learning culture. It attempts to narrow the focus of educational leadership down to the core functions of a school which is student learning.

While the purpose of instructional leadership is laudable and perhaps necessary in order to focus leaders on their core mission which is education and student learning, it is stuck in a concept that is no longer as relevant in contemporary schools. While the move from managerial to instructional as a focus may have been important, educational leadership has already moved beyond prior conceptions of management and now embraces the importance of leading leaders and leading for learning. While an inviting approach to leadership recognizes the complexities and realities of contemporary leadership, instructional leadership seems overly simplistic and technical in its approach. Moreover, the term itself— instructional— assumes a connection between instruction and learning. This is not necessarily the case. Instruction is not the same as learning and does not resonate with my approach to education as much as the promotion of educational living, as noted in invitational theory, does. An inviting approach to education and educational leadership suggests curiosity, creativity, thoughtfulness, and consideration while instructional suggests the only way to learn is through the transmission from one vessel (the teacher) to another (the student). While classroom teachers have the most influence on student learning (Leithwood & Jantzi, 2000), an inviting approach suggests a more
democratic approach that encourages learning. Instructional leadership connotes top down hierarchical while invitational is more democratic.

**Constructivist Leadership**

Constructivist leadership suggests a process that engages reciprocal learning in community toward a shared purpose (Lambert, 2009). Connecting to moral, ethical, servant, transformational, and invitational leadership, constructivist leadership has to do with creating a common moral purpose as a leader in order to move the school forward. A constructivist perspective recognizes that individuals have experiences, knowledge, assumptions, and perceptions pre-existing and it is up to the leader to build upon them by encouraging reflection, inquiry, and dialogue (Lambert, 2009). A constructivist considers what is already known and how it can be built upon.

Constructivist leadership suggests a reciprocal process of purposeful learning combined with action in the community because only in learning can there be lasting improvement (Lambert, 2009). According to constructivist theory, formal leadership structures invite dependencies, and limit the brain’s power to learn. Leaders must foster trust because it is within a trusting learning environment that growth is most likely to occur (Lambert, 2009).

Constructivist leadership theory has many congruencies with inviting theory in that it suggests a democratic approach in which it is assumed that all can learn within a shared moral purpose. It encourages leaders to let go and to trust others, much like an inviting approach does. Lambert (2009) would summarize constructivist leadership as a way to initiate new ways to solve problems, engage colleagues in mutual planning, synthesize a shared vision, encourage reflection, listen, and facilitate action research.
While the congruencies with inviting leadership involve a shared democratic approach focused on trust and collaborative planning, the constructivist approach appears to ignore or minimize the structural organizational realities of contemporary school systems and boards. While similarly questioning traditional leadership assumptions, constructivist leadership promotes leadership that may have reduced effectiveness within an organization. While inviting theory recognizes organizational structures and the realities or hierarchy and organizational authority, constructivist theory dismisses or diminishes the importance. While laudable, theory should be both aspirational and grounded in reality in order to exert influence.

**Entrepreneurial Leadership**

As the embrace of standardized testing, public accountability, and outcomes-focused education has become the norm in Ontario, a call for business model leadership can, at times, dominate opinion articles in the newspaper and talk radio. As a school principal, I am often faced with members of the private business sector who suggest that school reform should embrace a business model. The big idea of proponents of this approach to education and educational leadership is that competition is natural, good, and more likely to produce quality results. Increasing accountability, competition, and a free-market approach to education will inspire growth, increase competency, and expose underachievement. To use an American political analogy, this approach to educational reform and leadership would be embraced by the Tea Party, the right wing of the Republican Party.

The basic assumption of proponents of entrepreneurial leadership is to challenge the assumption that “it is wrong to make a profit running schools” (Wilson, 2006, p. 197). Entrepreneurs are regarded as risk takers and problem solvers and as such, should be
regarded as excellent potential for educational leaders. According to Hentschke (2009), entrepreneurs are innovators who, when they have a unique idea, will fixate on it, go their own way, and grow their business in support of the idea. They have a tolerance for risk, a desire for control, ambition, perseverance, and are decisive and bold enough to take schools in unique directions and change when appropriate (Hentschke, 2009). The prevalence of educational businesses such as Oxford Learning and Kumon provide evidence of the public desire to invest in education and the entrepreneur’s willingness to fill any perceive void in the educational market. Profit, competition, individualism, and competition will create a survival of the fittest situation whereby only the highest achieving survives. Entrepreneurial leaders are driven to be successful and this drive will result in competitive schools, competent teachers, and increasing value within the school system.

This approach to education in general and leadership specifically is perhaps an extreme example of the business oriented, organizationally top-down focused leadership of Fullan and Leithwood, but it is an on-going topic of public debate as a business approach to education is constantly floated as a solution to fiscal concerns and standardized student achievement and competition.

Education is more than test scores and balanced ledgers. While not dismissing the importance of student success and doing so in a fiscally responsible manner, the business of education should be focused on the development of human potential and the encouragement of all to live educational lives. We have a moral responsibility and ethical imperative to be more than results driven and competitive. Educational leaders can achieve all of this and more by modeling, encouraging, living, and leading educational
lives which develop human potential and call forth others to be more in service of educational ideals.

**Camp 2: The Leader, the Servant, and the Self**

While the educational leadership theories explored above continue to influence educational policy in Ontario, many scholars reject the business model approach to education and leadership and suggest leadership which is more oriented toward service, collaboration, self-awareness, and social justice, rooted in moral and ethical practices. These theorists, while not having the direct ear of the Minister of Education or the Premier of the province, continue to significantly influence educational leaders’ approach to leadership which is student-centric, community and collaborative focused. Servant leadership in particular is the professed preferred leadership style of nearly half of the school boards in the province as job postings in Catholic school boards continue to seek leaders who embrace a service oriented approach.

**Servant Leadership**

Servant leadership is the professed preference of many Catholic school boards across the province, including my own. Postings for leadership positions usually ask for applicants to demonstrate evidence of servant leadership. As a school principal in a Catholic school board, an understanding of servant leadership theory and how it impacts practice is important for all leaders. Servant leadership focuses on enabling and fostering community by serving others. Scholars such as Greenleaf (2002) and Crippen (2005) promote the power of service as a leader and the positive correlations between this form of leadership and school environments. Though scholars such as Greenleaf and Crippen continue to explore this model, servant leadership has deep historical roots, taking examples from leaders such as Jesus of Nazareth or Mahatma Ghandi. These individuals
provide examples of service and sacrifice for the betterment of society or from a servant leadership perspective, of an organization.

Referring to the traditional leadership explored earlier, Greenleaf (1977) suggests that a leader who does not serve, does not call forth the potential of those within the organization. Despite Greenleaf’s work on leadership coming out the late 1970s, Sergiovanni (2007) continues to feel that servant leadership is missing from the mainstream conversation about leadership. My experience as a leader within the Catholic school board would dispute that claim as it appears to be the most relevant leadership discussion to those seeking leadership within the board.

Greenleaf (1977) believes that the only authority deserving one’s allegiance is that which is freely and knowingly granted by the led to the leader in response to, and in proportion to, the clearly evident servant stature of the leader” (p. 10). A great leader is a servant first, supporting those within the organization, realizing that the strength of the organization or school is based on the competency, capabilities, and talents of the team. A servant leader is a leader of leaders, developing competencies and encouraging commitment in others. Schools are of particular importance to servant leadership in this context as they are uniquely communities of learners who, with a servant leader, share the burdens of leadership (Sergiovanni, 2007).

Servant leadership places the leader in the service of others for whom he or she has responsibility in service of ideals (Sergiovanni, 2007). It is primarily an act of trust whereby people and institutions entrust a leader with certain obligations and duties which a leader should fulfill with proper regard for other people and the common welfare of the organization or school (Sergiovannni, 2007). This is where servant leadership connects most directly to invitational leadership. Ideals matter and the service of ideals as the
focus of servant leadership is congruent with the service of the ideals of promoting educational living in invitational leadership. Trust, a key component to servant leadership, is also one of the foundational values of invitational leadership. This also highlights, however, how servant leadership does not go far enough. While trust, service of others, responsibility for the common good, and the pursuit of commonly held ideas align with invitational leadership, invitational theory begins from a caring core, respects, and trusts others, is optimistic about the future and does so intentionally. These foundational values go well beyond servant leadership when the values are reflected in the five Ps of people, places, programs, policies, and processes. While the core ideal of servant leadership challenges traditionally accepted leadership norms, it remains a starting point for transforming the concept of what it means to be an educational leader whereas invitational leadership extends by connecting to the realities of contemporary schools and school leadership.

**Inclusive Leadership**

James Ryan, a contemporary of both Leithwood and Fullan at the Ontario Institute for the Study of Education (OISE) at the University of Toronto, suggests a radically different approach to educational leadership than his colleagues. Instead of a leader-focused, top-down approach to leadership championed by his colleagues, Ryan (2006) promotes an inclusive style of leadership that taps into the potential of everyone within the community to contribute, while recognizing the importance of leadership on the promotion of social justice and equity within contemporary schools.

According to Ryan (2006), leadership should be pursued as an intentionally inclusive practice that values all cultures and types of students in a school. Inclusive leadership embraces differences in the community and the school as revealed through the
students, teachers, parents, and community partners. From the traditional concept of a nuclear family to the single parent, new immigrant, parents working multiple jobs, homeless students, to issues of race, religion, gender, and sexual orientation, Ryan (2006) promotes leadership that includes and embraces all in the leadership of the school.

Inclusive leadership recognizes that the educational model of leadership was heavily reliant on a management model. By using this model, the education system invested particular individuals with power so that the leaders “would be able to force, motivate or inspire others in ways that would help schools achieve the comparatively narrow ends of efficiency and productivity” (Ryan, 2006, p. 3). An inclusive approach encourages the participation of all stakeholders in the goals of the school and community. The richness and wealth of talents, abilities, and gifts can come from all and should be utilized effectively in order to have the greatest impact on students, and to break down barriers to inclusion. As Ryan (2006) notes, not everyone does well within our education systems as not everyone is equally advantaged.

Inclusive leadership is more than utilizing the talents of all stakeholders; it is about the promotion of social justice within our school systems. Those who promote inclusion believe that social justice can be achieved if people are meaningfully included in institutional practices and processes (Ryan, 2006, p. 5). Ryan writes about challenging the acceptance of hierarchy as it is exclusionary. Leadership, if it is to be genuinely inclusive, should foster horizontal relationships that also “transcend wider gender, race, and class divisions” (Ryan, 2006, p. 7). Much like previously mentioned scholars, inclusive leadership rejects the notion of a leader as a hero and suggests that those who go it alone as leader very rarely create real change in an organization. Leadership is,
according to Ryan (2006), best seen not in terms of individuals but as a collective process.

Engaging and including requires the establishment of trust as the leader recognizes that reaching out to traditionally excluded members of the community requires relationship building. Inclusive leadership is, in many ways, congruent with an inviting approach to leadership as trust is recognized as a key element to successfully calling forth the potential of all to contribute to the betterment of the school and community. Instead of keeping people at bay beyond the chain link fence of the schoolyard, an inclusive leader, much like an inviting leader, seeks to bring people in, to make formerly disenfranchised welcome, and to tap into the wealth of potential talent, ideas, and opinions in the community. As Ryan (2006) notes, the processes and policies enacted by the leader goes a long way toward the creation of an inclusive environment, much like processes and policies are part of the five Ps of inviting leadership. Inclusive leadership and inviting leadership recognize the importance of breaking down barriers to inclusion and participation in the life of the school. Inclusive leadership, however, places social justice at the forefront much more so than an inviting approach does, though the goals of both are to invite and include all. The approach leading as a form of social justice and promotion of equity is revealed in the story of Billy Tate in this dissertation as his inviting approach bravely invited the formally disenfranchised to participate in the life of the school.

While inviting and inclusive leadership have many parallels, inclusive leadership more overtly rejects the institutional approach of hierarchal leadership as a reaction to the prevailing theories supported by the Ministry of Education in Ontario and Ryan’s colleagues and places social justice at the forefront of leadership theory. Inviting
leadership, while implicitly agreeing regarding the distribution of leadership and traditionally accepted leadership norms, offers leadership which is focused on leaders, students, community building, and shared success and less on larger political issues of education for social change.

**Moral Leadership**

Thomas Sergiovanni (1992, 2006, 2007) suggests that moral or virtuous leadership which is intrinsically motivated creates leadership which will be more beneficial to students by creating a more harmonious learning environment. According to Sergiovanni (1992) school leaders need to embrace service in order to move toward moral leadership by providing, supporting, and encouraging teachers and students. Building on the work of Greenleaf (1977, 2002), Sergiovanni describes a servant leader as one who puts the needs of others first in supporting student achievement. Staff become part of the decision-making process and therefore increase their connection to the school and decisions while motivation becomes intrinsically based (Sergiovanni, 1992). Sergiovanni uses Kant to argue that any action taken, in order to be moral, must be based in the belief that it is right. Moving toward intrinsically motivated moral decisions rather than extrinsic motivators such as standardized tests will ultimately provide for the diverse needs of the students within our schools (Sergiovanni, 1992). Moral leadership involves administration taking a back seat to the teachers and students providing support while encouraging and providing opportunities for teachers to make appropriate moral decisions crucial to a virtuous school. This involves abandoning top-down leadership styles in favour of leaders who practice humility, reject bureaucracy, and support and trust staff members.

According to Sergiovanni (2007), “moral authority relies heavily on persuasion
and at the root of persuasion are ideas, values, substance, and context which together define group purposes and core values” (p. 90). Developing a shared moral purpose is what brings an organization together, working toward common goals. Leadership that is moral is focused on doing the right things for the right reasons and it is in this commonly agreed upon ideal that the leader communicates and consolidates collective efforts.

Invitational leadership similarly emphasizes the importance of the service of ideals and takes Sergiovanni’s moral leadership further educationally. Instead of moral ideals being an esoteric concept, invitational theory grounds this in the pursuit of educational living for all as the moral lynchpin of invitational leadership. Invitational theorists would agree with Sergiovanni that common moral purpose, as articulated and lead by a leader, galvanize an organization, and they would identify that moral purpose specifically as the pursuit of educational living. It is in this way that inviting leadership connects more directly to educational leadership by grounding in the realities of schools and their pursuit of educational ideals.

**Ethical Leadership**

Starratt (2004) builds on Sergiovanni’s work by presenting responsibility and authenticity as being paramount to effective ethical leadership with the connection between the two being “presence.” Patrick Duignan (2007), a colleague of Starratt’s at Australian Catholic University, similarly suggests the importance of ethical leadership by a leader being true to his or her ethical core and being the most authentic self. A leader who is authentic about his or her leadership connects deeply with individuals and encourages a common ethical commitment to the goals of the organization. Educational leaders need to be “present” with others and Starratt (2004) proposes three forms of presence for educational leaders: affirming, critical, and enabling. According to Starratt,
presence means being there for others in an authentic and responsible way and allowing others to blossom and reach for their potential. An affirming presence means an unconditional regard for others you are working with by affirming through public displays of thanks, respect, and value. A critical presence is required to recognize problems, evaluate them and start toward solutions while a critical presence requires the leader to constantly be evaluating and considering. An enabling presence recognizes that the “we” is important, therefore fostering community (Starratt, 2004). When a leader is present in an affirming, critical, and enabling way, they are aware of their responsibilities and fulfilling them in authentic ways (Starratt, 2004).

Fluker (2001) characterized ethical leaders as similarly possessing three common qualities: character, civility, and community which are embodied in ethical leaders as hope, empathy, and integrity. Civility refers to an individual’s understanding of how personal character relates to one’s place in society and is expressed by ethical leaders as reverence, respect and recognition. Community is exemplified by compassion, justice and courage, all within the context of cooperation.

Ethical leadership, as articulated by Starratt (2004), Duignan (2007), and Fluker (2001) suggests the importance of authenticity as a leader pursues organizational goals hopefully, with integrity, and empathetically. Recognizing the importance of the pursuit of goals in an ethical, open, and transparent way encourages followers to come together. Ethical leadership aligns with invitational theory’s notion of personal leadership and inviting oneself personally and professionally. According to inviting theory, a leader must invite him or herself personally and professionally and embrace the reality of personal leadership which does not separate the personal from the professional. An authentic leader, as Duignan and Starratt would agree, recognizes him or herself,
understands strengths and weaknesses, connects with others more easily as a result, and develops trust and respect as a result. Similar to previously mentioned leadership theories, while ethical leadership connects with invitational leadership in some ways, its focus is not comprehensive enough to address the realities of school leadership. While ethical leadership suggests being authentic and true to oneself in an open, honest, and ethical way, invitational leadership agrees and recognizes how that notion of ethical leadership is an important component of the big picture, but it is only that. An inviting perspective brings it all together and roots ethical and personal leadership in the bigger picture that takes into account the complexities of school leadership. Leading ethically and authentically is important to be sure, but it is a part of the larger picture that invitational theory espouses.

**Inviting Leadership as a Hopeful Alternative**

School leadership theory is widely explored by numerous scholars and theorists as it is recognized as having an enormous impact on schools, school cultures, teachers, and ultimately student learning. The ways in which educational leadership is considered may vary from a systems approach that values organizational efficiency, transformational culture and change to ethical and moral leadership that holds leadership to a formidably high standard yet the goal for each remains constant: to influence practicing and potential leaders to do great things, grow organizations, influence cultures, and impact student learning. The theories briefly explored above reveal the immense interest in educational leadership theory and ways in which leaders can lead ethically, influence change, and promote harmonious, moral educational organizations. Though none are explored in depth, the size of this dissertation already challenges the limits of an acceptable word and
page count; they are briefly touched upon in order to situate invitational leadership within the wider exploration of educational theories.

In many ways, as noted above, the goals and suggestions of these theorists are congruent with an inviting approach to leadership. In many ways, however, they fall short by not going far enough, deep enough, or are more focused on measurement outcomes than the development of human potential to live educational lives. Where invitational theory sets itself apart is in the foundational values of care, trust, respect, optimism, and intentionality which is revealed practically and can be experienced in tangible ways in contemporary schools. After investigating these theories which are both complimentary in many ways and competing, invitational leadership theory emerges as a credible, hopeful, and exciting theory of practice that is not only an alternative to existing, but an amalgamation of the best elements of each which provides a more comprehensive approach to leadership that is grounded in the realities of contemporary schools.

**An Inviting Theory of Practice**

Invitational leadership suggests that effective leadership invites others to use their talents to contribute to the betterment of the school. Invitational leaders invite others and work collaboratively with their heart, heads, and hands (Novak, 2002). Though the leadership theories presented above present some ideas individually for approaches to educational leadership which are focused on increasing capacity, collaborative approaches, improving student learning, social justice and equity, serving others, while being student centric, morally and ethically sound, and grounded in the reality of contemporary schools, invitational leadership’s approach to leadership which is rooted in a foundational core of care, optimism, trust, and intentionality is truly unique.

Invitational leadership theory has made an immense impact on my leadership and that of
Billy Tate because it provided a solid foundation on which to stand, based on the perceptual tradition and a democratic ethos. While the many educational and administrative theories presented above provide excellent arguments for a new way to think about leadership and to lead, invitational theory provides a solid educational foundation connected to the realities of leadership in contemporary schools. Put simply, other leadership theories suggest way to *act*. Invitational theory suggests a way to *be*.

With this in mind, an inviting approach to leadership starts from the inside out as a theory of leadership intimately connected to me as a leader, working outward from there. As an inviting leader, I understand myself, the qualities and attributes that make up me, and the ways in which that influences my approach to relationships, people, places, programs, policies, and processes. Instead of working from the outside in, an inviting approach allows me to centre my ideas and practice which contribute to more authentic leadership, better relationships, and an ability to see the big picture as well as the details that will contribute to its attainment. It is in this practical way that I have approached invitational theory: as a theory of practice which can contribute to effective leadership strategies and philosophies in contemporary schools.

**Invitational Leadership**

The leadership theories outlined above have many obvious similarities of goals and focus as they attempt to influence educational leaders in order to make a positive impact on school culture, staff engagement, and student success. Despite the numerous and seemingly endless initiatives and directives from boards, councils, and ministries of education, some of which appear to move school leadership to a more business-like managerial approach, invitational leadership challenges leaders to develop visions that matter and are educational in their purpose and goals. An inviting approach is a state of
mind rather than a simple framework for educational leadership. Intentional invitational living can become a way of life that can transform classrooms, schools, individuals, and the world (Asbill, 2006).

Invitational theory was originally based on four founding assumptions of trust, respect, optimism and intentionality which has since been expanded to include care (Novak, 2002), something which has prompted debate within the invitational theory community and will be discussed further in this paper. This dissertation considers invitational theory as a theory of educational leadership as championed by Novak (2002) who suggests that educational leadership should be about calling forth human potential and encourages leading for educational lives (Novak, Armstrong, & Browne, in press). In this way, inviting theory is revealed as an evolving theory of practice.

The foundational assumptions are revealed through the five Ps: places, people, programs, policies and processes. There are four levels of invitational theory which include intentionally disinviting, unintentionally disinviting, unintentionally inviting, and intentionally inviting and four dimensions which include being personally inviting with oneself, being personally inviting with others, being professionally inviting with oneself, and being professionally inviting with others (Novak, 2002). As with any idea, there are similarly four stages of implementation: awareness, understanding, application, and adoption (Purkey & Novak, 1996). Implementation is a slow growth, transformational process that does not take place overnight (Asbill, 2006).

Invitational leadership is an integrated system of insights, assumption, concepts, and strategies for creating, sustaining, and enhancing inviting schools (Novak et al., in press). Based on the concept of doing things with people rather than doing to, an inviting approach invites the participation in the leadership of the school while invitational leaders
foster a culture of open collegial collaboration accomplished through care, trust, optimism, respect and intentionality. An inviting perspective is based on five assumptions: (a) people are valuable, responsible, and should be treated accordingly; (b) educating should be collaborative and cooperative; (c) the process is the product in the making; (d) people possess untapped potential in all areas of worthwhile endeavour; (e) this potential can best be realized by places, policies, programs, and processes specifically designed to invite development and by people who are intentionally inviting (Purkey & Novak, 1996, p. 3). People need to be understood according to how they perceive the world and recognize their perceptions in order to understand how they fit into the world and the organization (Novak, 2002). An inviting approach is decidedly democratic in the recognition that all people matter and contribute to the whole in a meaningful way (Novak, 2002). As idealistic as this might sound, given the reality of my experiences with difficult parents, stagnant teachers, and underwhelmed students, an inviting leader recognizes the vested interest that each has in education and endeavors to encourage and inspire their active engagement in the educational process and the organization. I dedicated myself to finding out more about the tenants of the theory of inviting educational leadership.

Invitational leadership should be intentional where leaders are cognizant of their actions and the repercussions on staff (Novak, 2002). As Asbill (2006) states, “invitational schools do not happen by accident” (p. 9). Intentionality is what sets this philosophy apart (Asbill, 2006).

I had been given opportunities to lead and would consider myself to be an optimistic, caring, and trusting person by nature but it was not until I became intentional about my decisions and my practice that I could embrace invitational leadership
completely. I became cognizant of decisions and considerate of the implications of policies, procedures, and programs while reflecting more on practice.

Novak (2002) encourages self-reflection by considering the four levels of inviting. Intentionally disinviting people tend to minimize the importance of others and keep those within the organization at a distance and submissive. Unintentionally disinviting people are not aware that their actions discourage active involvement in the organization and trivialize the contribution of others. Unintentionally inviting people lead positively but without reflection or understanding of how or why while intentionally inviting people do things on purpose for purposes that can be defended (Novak, 2002). Understanding the levels of inviting and focusing on the concept of intentionality resonates deeply as an inviting perspective invites reflection and critical assessment of my approach to leadership. This thoughtful reflection contributes to my understanding of how and why I lead and informs my decision making.

Leadership is an art and we have the responsibility for moral action that influences the lives of people (Purkey & Siegel, 2003). In order to lead invitationally, a leader must respect others, foster trust between people, care for the process of leading, be optimistic that better futures are possible, and be intentional in the process of leading (Novak, 2002).

An invitational leader trusts others to carry out their responsibilities to the best of their ability. In my experience, fostering trust involves giving up responsibility and trusting that others will fulfil their duties to the fullest. By trusting, as an invitational leader, I respect the contributions of others as vital to the betterment of the organization. I have found that respecting each individual’s talents and potential contributions invites collaboration and builds positive relationships. An invitational leader cares about the process of leading and in particular those with the most immediate impact on the school
such as students, staff, and parents. Caring about each individual and how they progress academically, professionally, and socially requires direct engagement with people and an involvement in an understanding of how each person is special and contributes to the school. Being optimistic that better futures are possible requires a hopeful, positive approach to leadership that actively regards what is possible rather than the multitude of obstacles or impediments to school improvement. It is important to understand the challenges facing school improvement and leadership but being optimistic that they can be overcome contributes significantly to the establishment of an inviting school. Being trusting, respectful, caring, and optimistic does not occur accidentally according to invitational theory but rather it is the intentional consideration of a principal’s approach to leadership that significantly contributes to his or her success. An inviting approach to leadership encourages the participation of all in the organization. According to Novak (2002), when a principal exhibits behaviours and truly lives from a caring, respectful, optimistic, trusting, and intentional perspective, others are more likely to participate to the community in positive ways.

Leading, managing, and mentoring are anchored in a hopeful action-oriented perspective which offers an approach to integrating feelings, thoughts, and actions (Novak et al., in press). Instead of accepting the position of principal and simply seeing what happens, an invitational leader carefully considers his or her approach to leadership and intentionally approaches people, situations, the physical space, programs, policies, and processes. For my leadership as a school principal, it was not until I became intentional in my approach that I could embrace inviting leadership fully.

**Evolving Theory of Practice**

The foundational principles of invitational theory continue to be debated at the
time of writing this study and that debate is likely to continue. As an evolving theory of practice, invitational leadership is open to new ideas and interpretations as scholars debate the very foundations on which the theory is based. A theory that is not expanding and inviting conversation can be considered a dead theory. The debate within the invitational community continues.

The founding principles of invitational theory are trust, respect, optimism, and intentionality (Purkey, 1978; Purkey & Schmidt, 1987; Purkey & Siegel, 2003). A fifth foundational principle was suggested by Novak (2002). The notion of care being at the core of all inviting practice is something that Novak (2002) introduced in his work. According to Novak (2002), care is the root of invitational theory because without care, educational leadership is reduced to implementation. Novak’s work builds on Purkey’s original ideas by taking an educational perspective on inviting theory. Not merely a theory of leadership, Novak (2002) suggests a theory of educational leadership. Since education is essentially an imaginative act of hope intended to influence more people to live educative lives (Novak et al., in press), a leader must care about the process of leading and living educationally and about all within the school and community. Care provides the foundation on which trust, respect, optimism, and intentionality can develop and influence others toward the creation and fostering of an inviting school. The inclusion of care as a foundational principle is embraced by this paper as I recognize the centrality of care to my approach to inviting educational leadership as well as the leadership of Billy Tate. Care for the children, their development, the staff, school, organization, and community is paramount to inviting leadership and is not only included within this paper but is considered first among the foundational principles. Though some within the inviting community resist the addition of care to the foundational principles,
preferring to focus on the original four, the conversation amongst educational scholars reveals the passion and conviction of those committed to living and leading invitationally and invitational theory as alive and well.

While some embrace the debate as evidence of a vibrant, evolving theory of practice, others advocate for the standardization of invitational language. Shaw and Siegel (2010) argue that the discrepancies and variances within invitational theorists hinder its wider acceptance within the academy. They suggest adopting standard terminology for the foundational principles and elements of the theory. According to Shaw and Siegel, standardization will strengthen the theory for empirical research, decrease confusion, reduce inconsistencies, and further the acceptance of invitational theory within education and beyond. While some invitational scholars such as John Novak (2002) might argue that debate and conversation about the theory reveals its applicability and relevance as a living theory, others like Shaw and Siegel argue that the standardization of invitational theory’s basic terminology and concepts is essential for the long-term growth and acceptance.

**People, Places, Programs, Policies, and Processes**

The way in which invitational theory is manifest in school leadership is revealed in the five “Ps”: places, people, programs, policies, and processes. The physical environment is perhaps the simplest and straightforward “P” to consider from an invitational perspective to create spaces which support inviting education. An invitational leader intentionally focuses on people and invites participation in the process of leading. Programs and policies are established, managed and intended to contribute to an inviting school. Processes recognize and invite the talents and contributions of those within the organization and utilize them for the betterment of the school.
The five Ps through which the foundational principles are revealed: places, people, programs, policies, and processes have similarly attracted further consideration by educational scholars. Fink (1992) has suggested the consideration of the inclusion of a sixth P: politics. The political nature of schools and school boards is a reality as politics is synonymous with people, which is the core of any school. Fink suggests that without considering politics as a sixth P, the other five Ps are undermined or negated (Fink, 1992). Fink has a point to some extent. Organizations all have a political element to them. Understanding how to work with people, how the organization works, and the structures that are inherent and how they provide leadership opportunities is important to consider as an emerging leader. To be a slave to political influence is not something an inviting leader aspires to as the foundational values provide an ethical and moral grounding upon which leadership is rooted. Conversely, to ignore the political aspects of an organization is not only inadvisable but perhaps foolhardy. Leaders are given opportunities to lead because of their leadership abilities, yet the realities of the organizational politics provide these opportunities. Politics is people, and understanding how to work with people and utilize political opportunities is important for emerging leaders. Politically based decision making, however, would be incongruent with an inviting perspective.

According to Bolman and Deal (2007), people rarely give their best efforts when ordered to do so. Direction is accepted when authority is perceived as being credible, competent, and sensible (Bolman & Deal, 2007). In their article “The Manager as Politician,” Bolman and Deal suggest the importance of political leadership by exercising four key skills: agenda setting, mapping the political terrain, networking and forming coalitions, and bargaining and negotiating. Leadership that is morally grounded
recognizes how to exercise these four political skills in order to build relationships and encourage genuine participation from others. Bolman and Deal might agree with Fink (1992) in the recognition of the inevitability of politics in any organization. The question Bolman and Deal pose is not whether organizations are political but rather what kind of politics will they have? Fink might agree and suggest that since all organizations are political, an inviting perspective should consider that reality and address it accordingly. While politics can be seen as destructive, Bolman and Deal suggest that politics can also be a vehicle for achieving noble purposes. Recognizing that the system does indeed exist, Bolman and Deal as well as Fink might argue that understanding how to effectively navigate it is the best way to influence change and contribute to the establishment of an inviting school.

Many of the leadership theories such as transformational, change, instructional, and constructivist outlined earlier focus on the characteristics and interpersonal skills of the leader. Invitational leadership invites consideration not only of relationships with people but also the way in which the physical environment is inviting as symbols, signs, and the physical make up of a building or room can create an inviting school. Being intentional about the messages that are being sent is important to the creation of an inviting school. Further consideration of inviting leadership as reflected in programs, policies, and processes highlights the holistic consideration of leadership in contemporary schools which is unique to invitational theory and a reason why it resonates so strongly with my approach as well as Billy’s to our role as a school principal.

Relationships are the key to success through the development of genuine, mutual respect, being optimistic about situations, people, the future, decisions and being intentional about it all. Trust is the area that requires the most risk but an invitational
leader is optimistic that people will make the right decisions that are wise and congruent with the values and ideals of the school.

**Inviting Conflict to Conciliation**

Invitational theory presents a positive approach to school leadership by encouraging care, trust, respect, optimism, and intentionality. A superficial reading of invitational theory may appear to assume that invitational theorists’ only work in utopian schools in which every teacher is committed to going above and beyond for their students, parents are supportive of the school, teachers, and students, that they all arrive at school every day without a care in the world, prepared to positively interact with others and contribute to school learning. My experience at St. Stephen’s Elementary School and Billy’s at East Belfast Primary School reveal a plethora of unique situations, varying degrees of engagement from teachers, parents and students, and unforeseen emergencies and conflicts on a daily basis.

Invitational theory recognizes that school leadership is complicated and complex. Being optimistic, caring, and trusting might appear straightforward in perfect conditions but perfect conditions are not the reality of contemporary schools. Conflict is inevitable and can arise between parents, staff, students, and administration regularly. Invitational leadership does not ignore the potential for conflict but embraces it from an invitational perspective.

Invitational theorists value collaboration and recognize that though conflict can occur addressing it from an invitational perspective can further strengthen relationships and collaboration through the “Six C” process for conflict resolution (Novak, 2002; Purkey et al., 2010). In their book *From Conflict to Conciliation*, prominent invitational leadership scholars William Purkey, John Schmidt, and John Novak (2010) address
conflict from an invitational perspective. This approach to conflict resolution allows school leaders to take assertive and educational steps to come to resolve disagreements in a timely manner that recognizes the importance of maintaining positive relationships. An invitational leader embraces trust, respect, optimism, and care intentionally and addresses conflict from a positive perspective as an opportunity to further understanding and strengthen relationships.

The six-C approach provides chronological steps from the identification of the problem to the conciliation. The first step is concern, which involves the identification of concerns which can be addressed and are actionable. The second is conferral, which involves expressing concerns in non-threatening ways. The consult step is the third in the process which reviews and clarifies the situation collaboratively with all parties involved. The fourth step is confront, which considers all consequences and gives clear warnings. The fifth is combat, which involves taking sustained, logical action to address the conflict. The last stage is conciliation, which includes the mending of wounds and the restoring of relationships (Novak, 2002; Purkey et al., 2010).

School principals can and should expect conflict as differing opinions, agendas, and priorities manifest themselves within the school. The six-C process encourages reflection on each stage while providing guidance for managing conflict in a positive and constructive manner that is cognizant of the feelings of others and respectful of all parties.

By recognizing the immense talents and commitments of each member of the organization an inviting leader embraces collaboration that is inclusive of all contributors and stakeholders. The result is an inviting school which is manifested in the five Ps: people, places, programs, policies, and processes. Conflict is inevitable in any organization and perhaps particularly so given the emotional realities present in every
school. The six Cs encourage thoughtful reflection at each stage. In order to maintain an inviting school environment which contributes to student success, an inviting leader recognizes the importance of the ability to take a firm stance when required for the school. Invitational schools and invitational leaders can make a significant impact on contemporary schools.

**Invitational Leadership Theory and the Academy**

Of the thousands of doctoral dissertations defended every year, those focused on invitational theory remain relatively small. However, since Purkey (1978) first began to speak and write on inviting theory, more and more doctoral students are exploring invitational theory and its influence on schools, organizations, and leadership. While still a relatively niche theory within organizational, education, and leadership theories, many scholars have explored, written about, and successfully defended dissertations on this topic as both qualitative and quantitative research studies.

Deborah Chance’s (1992) dissertation is a qualitative study of how invitational education influenced positive changes in at-risk students, at the University of North Carolina. She looked at five middle schools in North Carolina whose lead teachers or teams were trained in an inviting approach to education in order to tap into the potential of the students and work on building self-concept. The study reported an increase in student self-esteem, reduced discipline concerns, and even improved beautification of the physical buildings (Chance, 1992). Inviting teaching styles were integrated into the classroom and curriculum and noticeable positive changes were noted in each of the five participating schools.

The dissertation of Kate Asbill (1994) from New Mexico State University tested the basic assumptions of invitational education as applied to elementary principals.
While recognizing past studies as being focused on principal-student relations, this study focuses more specifically on the relationship between the principal and teachers. This dissertation used a leadership survey based on the tenets of invitational education to assess teachers’ perceptions of principals’ practices (Asbill, 1994). The results reveal a highly positive correlation between personally and professionally inviting behaviours by principals and the job satisfaction of teachers (Asbill, 1994).

Another dissertation on inviting leadership focused on the educational behaviours of principals, in this case at the high school level, was written by Robert Egley (1999) at Mississippi State University. The study investigated the relationship between professionally and personally inviting behaviours of high school principals and their influence on teachers’ job satisfaction, the perception of the effectiveness of the principal and of the principal as an agent or school improvement, and the school’s overall academic ranking in the district (Egley, 1999). This study furthers the work of Asbill (1994) by taking a look at the value of inviting leadership on perceptions of effectiveness, teacher satisfaction, and student success and concludes by confirming the value of invitational education theory as a viable leadership theory (Egley, 1999).

Donna Thompson (2005) explored the creation of an inviting school culture in her dissertation at Austin State University. This qualitative case study looked at how a school can become an inviting school, the obstacles along the way, and how to overcome them. Data was generated through semi-structured interviews and observations (Thompson, 2005). The importance of strong leadership at the principal level was noted as key to the establishment of shared decision making, optimism, and care (Thompson, 2005).

Further work on the importance of an inviting leadership style to educational organizations was written by Gwen Burns (2007) at the University of Missouri-Columbia.
This dissertation utilized a mixed methodological study to explore the effectiveness of school leaders who profess to lead from an invitational perspective. The quantitative element of this study found a statistically significant difference between effective versus non-effective schools when the school leader lead from an inviting perspective. Burns (2007) makes the distinction between effective and non-effective schools in her study by using schools who were formally accredited for distinction and performance by the state for four or five successive years as well as schools’ ability to meet adequate yearly progress standards set by the state for two years in a row. The study revealed that schools which were led by invitational leaders were statistically more likely to meet the criteria as effective schools. The qualitative element of her study revealed teacher preferences for an invitational leadership style from teachers and an increase in the development of trust in schools with invitational leaders. Burns’s dissertation (2007) makes the argument that invitational leaders influence the creation of effective schools using her criteria for identifying effective schools and therefore should be further considered by practicing and aspiring school leaders. The active use of invitational leadership is proven to be a successful model that should be considered effective in contemporary schools.

Peter Wong’s (2007) dissertation focused on the influence of invitational leadership theory on the change process and effectiveness of secondary schools in Hong Kong. This study takes a qualitative look at the influence of an inviting educational perspective on a secondary school in Hong Kong. Wong (2007) argues that an invitational approach to leadership can positively influence change and contribute to school effectiveness using the study of one secondary school as a case study.

Another dissertation focused on teacher perceptions of the effectiveness of invitational leaders was written by Mary Jane Golding Hawthorne (2009) at Tennessee
Hawthorne’s dissertation took into account the high stakes testing and accountability measure in place in the United States and considered the effectiveness of inviting leaders in light of these reforms. Teachers were asked to identify their perceptions of their principal’s practices and the culture and climate created by inviting school leaders. This work further supports earlier studies by Asbill (1994), Egley (1999), and Burns (2007) by suggesting that an inviting approach to leadership is received favourably by teachers and influences culture and climate positively.

More recent dissertations (Beecham, 2009; Killingsworth, 2011; Thompson-Cabezas, 2011) have focused on the impact of inviting leadership on social justice and equity in schools. Beecham’s (2009) dissertation at Alabama State University and built on previous work by recognizing the impact and positive influence of inviting practice on school culture and climate as well as student outcomes. Specifically, Beecham explored historically black colleges and universities to see if an inviting approach could impact retention and graduation rates. Using surveys of students at these historically black universities and college, Beecham’s data revealed that the level of inviting practices on historically black colleges and universities does indeed influence retention and graduation rate. Beecham recommends further qualitative studies to examine the influence of inviting practice on universities with different demographics.

While Beecham (2009) explored the influence of inviting theory on retention and graduation rates at universities, Killingsworth (2011) explores the participation and retention rates of minority students in Advanced Placement (AP) courses and honours courses in secondary schools. Killingsworth’s study uses invitational theory to analyze the underrepresentation of minority students in AP and honours courses in the southern United States at Auburn University. Killingsworth found that the level of encouragement
received and the inviting approach of teachers, parents, and school leaders had a direct influence on students enrollment as and retention in AP and honours level courses. The results from Killingsworth’s analysis confirm that inviting theory is instrumental in student’s achievement and enrollment in these courses.

A colleague of Killingsworth at Auburn University, Christy Thompson-Cabezas (2011) similarly wrote on the influence and impact of inviting theory on equity in AP class placements. Though the focus of Killingsworth’s (2011) dissertation is the same, Thompson-Cabezas (2011) takes a quantitative approach to the same question to examine the enrollment gap in advanced courses between black and economically disadvantaged students and white students in the same program. The results of this comprehensive survey which included 1,462 participants, indicated a statistically significant score difference between the perception of invite messages between black, white, and low socio-economic students enrolled in AP programs and those who were not enrolled in advanced course (Tompson-Cabezas, 2011). Inviting messages were more likely received by students in AP classes and since black and socio-economically disadvantaged students are less likely to participate in these classes, they are less likely to perceive inviting messages.

Invitational leadership is not only explored as a theory of educational practice, but also by liturgical leaders as well. Tyler Warren Townsend’s (2011) dissertation at North Carolina State University used a qualitative case study of the leadership in three Baptist churches and the influence of invitational leadership theory on the approaches to faith leadership. As Townsend asserts, inviting theory has a significant influence on leadership and conflict resolution within the Cooperative Baptist Fellowship revealing the applicability of inviting theory outside of education.
The tenants of invitational theory continue to be considered and implemented in Hong Kong (Yin, 2008) and around the world. With dissertations successfully defended in Australia, the United States, and on-going work in Canada, invitational theory is gaining momentum as a theory of practice worthy of consideration by practicing educational leaders and scholars alike. While not exhaustively studied at the doctoral level, there is ample evidence of a growing body of research focused on the influence of invitational leadership theory on elementary, secondary, and post-secondary schools around the world.

This dissertation builds on the work of these successfully defended dissertations by further exploring inviting leadership and the influence on contemporary schools here in Canada and in Northern Ireland. Many of the dissertations focused on the effectiveness of invitational leadership on principals and schools uses the perceptions of teachers on the leadership of the principals.

The work of Killingsworth (2011), Thompson-Cabezas (2011), Beecham (2009), and Thompson (2005) on social justice and equity is also furthered by this dissertation. As they explored the influence of inviting leadership on social justice and equity in schools, this dissertation similarly does so through the exploration of Billy Tate’s leadership in a Protestant, sectarian housing estate in East Belfast. This dissertation provides a unique glimpse inside the housing estate and the unique challenges and complexities that Billy had to contend with. The housing estate is a poor, working class, neighbourhood in which generations of mistrust and sectarianism persist. The look at Billy’s leadership in East Belfast furthers the contentions made by Killingsworth, Beecham, and Thompson that inviting leadership can have a positive influence on the lives of the students within the housing estate and the community at large.
This dissertation furthers the work of the successfully defended dissertations cited above by adding an international perspective to the body of literature. Many of the dissertation seem to come from universities in the southern United States including Auburn University, Alabama State University, North Carolina State University, The University of Missouri, The University of North Carolina, New Mexico State University, Mississippi State University, Tennessee State University, and Stephen F. Austin State University, locating the majority of the scholarly interest in invitational leadership theory below the Mason-Dixon line in the United States. Inviting theory was founded by Dr. Purkey and Dr. Siegel at the University of Florida while Dr. Novak was a doctoral student of Dr. Purkey’s. Subsequently, the International Alliance for Invitational Education is situated in North Carolina, and Dr. Siegel, upon leaving the University of Florida, became the Dean of Kennesaw State University in Georgia. Perhaps the seeds that were planted in the southern United States have begun to flourish in the work at other universities throughout the south. This dissertation’s consideration of inviting leadership in Southern Ontario, Canada, and Belfast, Northern Ireland provides much needed diversity and perspective to the inviting leadership community. The autoethnographic methodology and narrative approach is unique when considering the work previously defended within the academy and offers a distinct first person perspective on the phenomenon.

**Reviewing Published Inviting Literature**

As a theory of practice, invitational leadership continues to make a significant impact on practice as revealed by papers such as “Invitational Theory: Does It Make a Difference?” (Egley, 2003) which studies the survey responses of school principals revealing invitational theory as a relevant theory of practice. Egley’s (2003) study, furthering the conclusions of his dissertation, reveals teacher’s perceptions of inviting
leaders as very favourable by teachers. Published research has made the connection between the intelligence beliefs of students within an inviting school and academic performance (Hossein et al., 2011). This study used survey data and found a positive and significant impact of invitational schools on incremental intelligence and performance (Hossein, et al., 2011). Students in this study favourably reported inviting culture as influencing performance, which was supported by their academic achievement (Hossein, et al., 2011). The Inviting School Survey tool (ISS) was created to reveal students’ perceptions of invitational climate in schools and assess school climate (Purkey & Schmidt, 1987) and revised in 1990 to include the five Ps (Purkey & Fuller, 1995). Consisting of 100 items at that time, the survey was reduced down to 50 with the Inviting School Survey Revised (ISS-R) in order to use it in schools (K. Smith, 2005; Smith & Bernard, 2004). This tool has been used to measure school climate and students’ perceptions and has been translated into Chinese to assess invitational schools in Hong Kong (Ng & Yuen, 2011).

The International Alliance for Invitational Education was established in 1982 by Dr. Betty Siegel and Dr. William Watson Purkey as a gathering place and connection for the inviting educational movement. The alliance supports an annual conference and the Journal of Invitational Theory and Practice similarly grew in response to the growing number of scholars and educators who were interested in learning more about invitational theory and leadership. Articles are published in the journal on a regular basis which explores the various ways in which invitational theory influences schools and educational leaders. Scholarly papers, such as “The Year of Living Invitationally: Reflections of a First Year Principal” (Browne, 2010), are similarly being accepted for presentation at international education conferences outside of the invitational alliance community and
published in peer reviewed scholarly journals. Scholars from around the world are connecting with invitational theory as a theory of practice with practical implications on contemporary schools.

Invitational leadership is being embraced and studied throughout the world as a theory of practice which is making a positive impact on schools globally. The creation of inviting schools is credited with improving the conditions and results in schools in poverty stricken neighbourhoods in South Africa (Kamper, 2008), and is regarded by teachers in England through surveys as an effective and preferred approach to leadership (Harris, Day & Hadfield, 2003). The impact of distributed leadership that recognizes and supports those within the organization through leadership strategies such as invitational leadership is studied and supported by research and suggests a re-conceptualization of leadership that supports the contributions of the many rather than the leadership of the singular (Harris, 2002). Further research in the United Kingdom similarly contests traditional hierarchical leadership in favour of an inviting, democratic approach that distributes leadership amongst those within the organization (Hatcher, 2005).

Much of the scholarly literature on invitational theory is published by the Journal of Invitational Theory and Practice and through books by scholars such as Purkey, Siegel, Schmidt, Novak, Rocca, and DiBiase. There appears to be a limited number of papers published outside of the invitational theory community which focus specifically on invitational theory. Many of the papers published in the wider educational community, some of which are mentioned above, reference invitational leadership theory in a wider study of similar approaches to leadership which promote democratic, distributed leadership or in overviews of a variety of contemporary leadership theories. In order to further promote inviting theory amongst the wider educational leadership community,
publication in a wider variety of journals is important. John Novak’s (2009) contribution to Brent Davies’s *Essentials of School Leadership* introduces readers of educational leadership theory to invitational theory. Novak shares his work along with prominent educational leadership scholars in this important overview of contemporary educational leadership theories.

Within the invitational theory community, a call to publish was issued in a paper published in the *Journal of Invitational Theory and Practice* (Smith, 2010). Smith (2010) challenges practicing educators to reflect further on their day to day work and to write it as action research and submit for publication. Similar to this dissertation which explores the intentional implementation of invitational theory in practice through the lens of two different school principals, Smith (2010) suggest that the revelation of the findings of practicing educators in public will further highlight the influence of invitational theory and reveal strong inviting educators doing good things (Smith, 2010). While some published outside of the invitational theory community are focused specifically on inviting theory (Browne, 2010), more invitational scholars should be invited to submit to scholarly journals for publication and consideration by the leadership community.

Of those articles published by the *Journal of Invitational Theory and Practice*, any do not explicitly focus on the leadership aspect of invitational theory. Seemingly assuming the leadership to be inviting—how can a school become an inviting one without a leader committed to leading invitational?—articles instead focus on the impact of invitational theory on the confidence and self-efficacy of students in inviting schools (Usher & Pajares, 2006), while others look at the environment and how the influence of place and the environment influence the implementation of invitational theory (Haigh, 2008). A qualitative study of the aspects influencing the implementation
of invitational theory in schools credits leadership as being a key aspect to the
difference between success and failure (Steyn, 2006). Invitational theory is shown to
positively impact the intelligence beliefs of students and their academic performance
(Hossein et al., 2011) while another looks at feedback and its role in enhancing students
self-regulation in inviting schools (Chung & Yuen, 2011). The influence of invitational
teachers on school climate in Hong Kong is revealed through the inviting school survey is
explored (Ng & Yuen, 2001) while the cross cultural applicability of the inviting school
survey is presented and discussed in another (Smith, 2011). There appears to be plenty
of literature published within the invitational community that supports the influence of
invitational theory on schools, culture, self-efficacy, and environment, yet an in-depth
look at invitational theory in practice through the lens of practicing leaders appears to
be lacking. Studies and published dissertations appear to be interested in teacher’s
perceptions of the influence of invitational theory on schools (McPhee, 1991; Reed,
1981), on student achievement (Arthur, 1985), on student’s perceptions of schools
(Turner, 1983), and on teacher’s perception of their principals (Asbill, 1994), yet
studies that focus on the perspective of the invitational leader through the lens of the
leader appears to be missing in invitational literature. As Smith (2010) suggests, more
invitational educators need to take up their pens or strike their keys and publish both
within the invitational community and beyond. Much of the literature published within
the invitational community through the Journal of Invitational Theory and Practice is
extremely supportive of invitational theory and invitational leadership. For this theory
of practice to become more influential and embraced beyond the inviting community,
discourse must occur beyond the confines of the Journal of Invitational Theory and
Practice and answer Smith’s (2010) call to write and publish more widely and thoroughly.

As I struggled to live and lead invitationally, wrestling with the ideas of inviting theory while grappling with the realities of big picture thinking and everyday events at St. Stephen’s Elementary, I met Billy Tate. We were introduced first via email and later in person in Belfast. In Billy I found another school leader who was committed to living and leading invitationally in a place where I understood an inviting perspective might not be universally embraced. Billy’s years of experience and confidence in his leadership provided a mentor-leader who showed me not necessarily how to lead, but more importantly, that inviting leadership is possible even in the most challenging of contexts.

**Mentorship and Leadership**

As I embraced an inviting approach to my leadership I attempted to navigate the expectations of the school community, staff, parents, and students with my commitment to living and leading invitationally. While there were things I could control such as the organization of my office and the principal’s reserved parking sign, there seemed to be much that was out of my control and unexpected situations on a daily basis. Connecting with Billy Tate provided the opportunity to learn from an experienced school leader who had similarly committed to living and leading from an inviting perspective. As Billy shared stories of his leadership in East Belfast, I came to understand how invitational leadership could work in the most challenging of circumstances. If Billy could live and lead invitationally in East Belfast, surely I could do so in Southern Ontario. As I reflected on my leadership through connecting with Billy, I also began to appreciate the importance of mentorship.
The demands placed upon educational leaders are numerous and complex. International trends in leadership recognize the importance of providing support to new leaders as well as leadership candidates (Hallinger, 2005). Leadership plays such an integral role in effective organizations therefore properly training and supporting leaders is tremendously important. Mentorship can play an important role in supporting this goal (Daresh, 2001).

The Ministry of Education in Ontario recognizes the importance of supporting school leadership by mandating that all newly appointed vice principals and principals participate in a formal mentorship program. Since the Literacy and Numeracy Secretariat (LNS) of the Ontario Ministry of Education launched the Ontario Leadership Strategy (OLS) in 2008, an evaluation of the strategy was conducted toward the end of 2011 by Dr. Ken Leithwood (Literacy and Numeracy Secretariat, 2011). This study found that more than 5000 school leaders participated as either mentors or mentees in formal mentorship programs (Literacy and Numeracy Secretariat, 2011). The report also found that the mentorship program was rated very highly by participants who considered the program beneficial to improving their confidence and skills as school leaders (Literacy and Numeracy Secretariat, 2011). Another study of the formal mentorship programs in two school boards in Ontario found that mentorship helps develop the competency of school leaders which allows them to effectively set direction for the school and district (Robinson, 2010). Developing school leaders through formal mentorship programs is a key responsibility for any school district (Robinson, 2010). As principals and vice principals have the opportunity to problem solve, collaborate, and share knowledge and expertise with one another the level of performance for school leaders is elevated for all involved (Robinson, 2010).
All school boards in Ontario are required to set up their individual board leadership development strategies (BLDS) teams in response to the OLS. The provision of formal mentorship programs for new school leaders is part of the BLDS for school boards. A review of school boards in Southern Ontario reveals a variety of approaches to the same concept of encouraging leadership development and support for new leaders. The Ontario Principals’ Council describes mentoring for newly appointed school leaders as a key component of the Ontario Leadership Strategy (Ontario Principals’ Council, 2011).

A review of a sampling of some of the leadership development strategies across the province through the school boards surrounding St. Stephen’s Elementary in southern Ontario reveals an emphasis on formal mentorship programs. The Dufferin-Peel Catholic District School Board (2011), Peel District School Board (2011), Toronto District School Board (2011), Halton District School Board (2011), Halton Catholic District School Board (2011), and the Wellington Catholic District School Board (2011) all identify formal mentorship programs for school leaders as part of their BLDS strategies. Formal programs for leadership development are offered by each of the surveyed boards as well as mentorship programs which match newly appointed school leaders with experienced school leaders in order to support their learning and competency as principals and vice principals.

Supporting school leaders is a priority for school boards because of the immense impact that school leaders have on student success, second only to direct teacher instruction (Leithwood & Jantzi, 2000). The key element to school improvement is leadership and mentorship plays an important role (Daresh, 2001). A primary goal for schools boards has become the investment in professional development for principals to enhance their effectiveness however, investment in university courses provides
diminishing returns in comparison to mentorship for school leaders which consistently rates higher for principal professional development (Grissom & Harrington, 2010).

A school principal is in most if not all cases a teacher who has demonstrated leadership attributes and has been promoted from the classroom to the helm of a school. Teaching has traditionally been an isolated profession. Teachers operating autonomously within their classrooms have long been the norm in schools. As is evidenced by the school boards BLDS strategies, research suggests that the best learning occurs in collaboration with others (Fullan, 1995). From classroom management and curricular demands as a teacher the principal assumes further responsibilities which include instructional leadership, technical expertise, and commitment to life-long learning as the lead learner in the school. While these pedagogical roles are a seemingly natural extension of the expertise required as a teacher, the multitude of further demands compound the skill set required to effectively leading a school. From teacher and leader the principal must also be an accountant, disciplinarian, human resources expert well versed in the variety of collective agreements relevant to the school, a counsellor for students, teachers, and parents alike, a public relations and media expert, a master communicator, an artist, coach, and author, able to inspire, collaborate, and mediate.

Emotions are high within a school as parents, teachers, and the public at large all have differing and passionate opinions about how each classroom, school and the educational system as a whole should be run. The effective management of these competing demands allows a principal to be a leader; to inspire, create, learn, collaborate, support, and mentor in the name of education.

A new principal is not eased into the role. A new principal is expected to know what to do and how to do it well immediately. A concerned parent or a struggling teacher
is not concerned with allowing a principal to slowly get their feet wet and develop over time. Instead a principal is expected to jump into the role with both feet confidently and competently immediately. This can be overwhelming. It was for me. As a result principals require intensive coaching and support when assuming their duties as school leaders (Bloom, 1999).

As referenced already, many boards across Ontario and around the world have recognized the importance of mentorship to the development of educational leaders. Mentorship can be best described as a reciprocal and collaborative learning relationship between individuals who share mutual responsibility and accountability for helping a mentee work toward the achievement of clear and mutually defined goals (Zachary, 2005). The focus of mentorship is to expand the potential of individuals through mutual accountability and responsibility. Mentorship thrives in a supportive culture (Zachary, 2005). Culture is rooted in behaviour based on shared values, assumptions, practices, and processes within a mentoring culture (Zachary, 2005). Mentoring must be a priority to create a mentoring culture. As this study suggests, the establishment and continuance of this culture can be established through an invitational perspective.

Mentorship can contribute to reduce the sense of isolation, improve skills, increase self-awareness, see the big picture when making decisions and become reflective upon experiences (Rich & Jackson, 2005). This can have an overwhelmingly positive influence on the learning process for both mentees and mentors alike (Hansford, Tennent, & Enrich, 2002). The benefits of mentoring to the individual can include accelerated learning, expanded and diverse perspectives, and increased knowledge of the organization, additional insights and improved skills in specific areas (Zachary, 2005). A mentoring culture helps people meet adaptive challenges (Heifetz & Linsky, 2002).
Mentoring helps manage and maximize knowledge by connecting organizational knowledge and speeding up the learning process and supports leadership development by building the internal capacity of leadership (Zachary, 2005).

The recognition of the importance of mentorship opportunities for new school leaders is supported by a plethora of research as evidenced by Hansford and Enrich’s (2006) survey of over 40 research papers focused on mentorship for educational leaders which found that mentorship provides substantially more positive outcomes cites the sharing of ideas and practices as important for professional development for both mentees as well as mentors. Mentorship is an important part of teacher training as teacher candidates are required to learn from established teachers through placements in classrooms throughout the program. The concept of the teacher as an apprentice learning from a master is not a new one in education (Hall, 2008). When aspiring leaders are able to witness and connect with experienced leaders in actual situations they develop a greater understanding of the role and expectations (Browne-Ferrigno & Muth, 2006).

Mentorship has the potential to influence more than the mentees as the development of the relationship enhances the efficacy of the mentees while serving as professional development for the mentor as well which contributes to the overall leadership efficacy of the whole organization (Crow & Matthews, 1998). Each time I connected with my mentor facilitated through my school board or with Billy in Northern Ireland, I thanked them for their time, expertise and willingness to listen to my concerns and help collaborate on a solution or direction. Every time they thanked me for sharing, recognizing how much they learn from each conversation and situation together. As my relationship grew I felt like less of a burden and more like a leadership partner.
Obstacles and Challenges

While school boards recognize the importance of mentorship and subsequently invest significantly in formal programs, tremendous obstacles obscure the potential impact. Under certain circumstances a mentoring relationship can actually be detrimental to both the mentor and mentee (Long, 1997). In fact, Hansford, Enrich, & Tennent (2004) suggest that in some cases poor mentoring can actually be worse than no mentoring at all. Without a strong relationship a mentor and mentee can struggle to support and connect. Connecting mentees with the right mentor can be a challenge within school boards.

While research noted above reveals the benefits of mentorship and the Ontario Ministry of Education has committed funding to supporting mentorship programs, poorly matched mentors and mentees can lead to stagnant relationships and the perpetuation of the existing norms within a school board or organization. Bloom, Castagna, and Warren (2003) claim that the mentoring received by most principals is inconsistent and suffers from severe limitations. The mentorship relationships are essentially exclusively arranged within the same board or district and as such challenges such as the sharing of confidences remain (Bloom et al., 2003). Organizations have a tendency to produce leaders who replicate the existing leaders and perpetuate the established norms. Mentors’ desire to create mirror images of themselves to fulfill generativity needs (Allen & Eby, 2003). German sociologist Robert Michels (1962) suggests that those in power focus significant attention on the maintenance of power rather than leadership. Leaders are chosen for succession by existing leaders. Mentors who are too deeply involved with internal politics within a school system can provide poor mentorship to new school leaders (Daresh, 2001). For effective mentorship to occur a shift in focus is required from
a mentor interested in the development of a learning relationship rather than simply the transferral of knowledge (Zachary, 2000).

While mentorship programs attempt to provide opportunities for new school leaders to form relationships with experienced principals to learn from one another, obstacles to success remain. Hall (2008) suggests the lack of a common language regarding mentorship, unclear roles and responsibilities resulting from poorly trained mentors, time constraints, mentor/mentee mismatching, and the absence of clear goals as significant obstacles to the success of any mentorship program.

While mentorship programs within boards can provide support for new leaders, questions remain about the effectiveness of externally organized mentor/mentee relationships and the compatibility of these relationships. Internal programs are convenient logistically, but they can serve as self-perpetuating leadership supports for the organization as new leaders learn to navigate the system. Connections beyond the confines of the organization or school board can provide objective counsel in a relationship unencumbered by organizational politics or existing structures. The mentor/mentee relationship I developed with Billy Tate does provide an example of mentorship outside of the norm as we connected across the Atlantic electronically at first and then personally in Northern Ireland.

I was just beginning my doctoral studies when Billy reached out to my supervisor with a note of thanks. Billy was on his way to London to meet the Queen and receive the Member of the British Empire (MBE) award and sent my supervisor an email to let him know about the award and about how his writing and a presentation he gave in the UK years earlier on invitational leadership had changed his philosophy of educational leadership and practice. He was going to receive one of the most prestigious civilian
awards in the United Kingdom and credited much of his success to his commitment to an
inviting leadership perspective.

My supervisor introduced us electronically as two inviting principals with Irish
heritage and a shared love of rugby. Billy and I regularly connected from that point on
about big picture school issues and day to day operational situations and, of course; Irish
rugby. I appreciated his perspective on creating an inviting school and leading from an
inviting perspective as I was intimately aware of and connected to the unique political
and cultural situation in Northern Ireland through my own family and my wife’s. I came
to trust his judgement and respect his opinion and courageous stance on difficult
situations. I developed an understanding of the implications of an inviting perspective in
schools in southern Ontario through my own leadership and an even deeper realization of
the universal implications of inviting leadership through Billy’s at East Belfast. The
mentorship relationship from outside of the organization I was working in provided a
broader context and unbiased perspective free from any potential political tainting which
can exist with a mentorship relationship from within as suggested by the literature (Allen
& Eby, 2003; Bloom et al., 2003; Daresh, 2001; Zachary, 2000). We spoke a common
language (Hall, 2008) of inviting leadership and inviting schools while relating
effortlessly through our shared heritage and cultural passions.

**Contextualizing Inviting East Belfast**

Billy and I spoke a common cultural language despite living on opposite sides of
the Atlantic. When he talked about challenges from paramilitaries, I understood not only
who and what he was talking about, but the historical context as well. His embracing of
the Irish language, Gaelic games, and the introduction of Irish dancing to the school had
enormous implications for the community and the recognition the school received outside
of Northern Ireland provides an indication of how meaningful this initiatives were. However, I am aware of the privileged perspective I have because of my family connections and cultural background. In order to understand the complexities of Billy Tate’s educational leadership in Belfast, it is important to understand the historical factors that contribute to the social and political realities of Northern Ireland.

The history of Ireland as an island and Northern Ireland as a separate state on the island is complex and complicated. Books on Irish history can be voluminous as can opinions and perspectives. While I recognize the challenges inherent in condensing key events in Irish history for the purposes of this study, I feel that historical context provides important perspectives on the political and social realities of Northern Ireland. Understanding Billy Tate’s invitational leadership requires a basic understanding of the context in which he led East Belfast Primary.

A Very Short History of an Extremely Small Island

Billy Tate embraced an inviting perspective on educational leadership at East Belfast Primary which was inclusive, optimistic, hopeful, and caring. In order to understand East Belfast Primary, the housing estate and its inhabitants, the political, social, and cultural context in which Billy lead invationally, it is important to recognize the history and politics of Ireland generally and the six provinces that make up Northern Ireland specifically.

Growing up in a southern Irish Catholic family and being married to a Northern Irish Protestant I have an understanding of the creation of divided country and the historical divisions, hatred, and violence that have been a reality in the North. I have read volumes about the history of Ireland, The Troubles, politics and the peace process and understand that attempting to distill the situation down to a few mere paragraphs is not
only difficult but perhaps foolish. There are so many opinions, ideas, perspectives, and experiences which collectively make it nearly impossible to accurately sum up the reason why Northern Ireland is the way it is. The history of Northern Ireland a collection of diverse experiences which create individual perspectives for so many which vary considerably depending on religion, politics, and most importantly, experiences.

**Orange Order and Sectarian Origins**

The conquering of Ireland by William of Orange in 1066 is arguably one of the most significant events in this history of the island as it established control by the English monarchy (Coohill, 2002). The Normans controlled most of the island for the next few centuries until Tudor times during which Irish control became even more important to English shipping. Henry the VIII was declared King of Ireland in 1541 and Irish Chiefs were forced to swear allegiance to the crown while major religious change was introduced to the island (Coohill, 2002). The introduction of Henry’s protest against the Vatican and establishment of the Church of England and Ireland fueled centuries of conflict and sectarianism stretching until the present.

In 1688 English nobles invited the Dutch prince William of Orange to invade England to re-establish the monarchy over the Catholic King James II who was the brother of Charles II. William of Orange famously defeated James’ army on the River Boyne forcing James to sign the treaty of Limerick. This treaty granted some lost property rights to Catholics but since the Irish Parliament was largely Protestant it was never ratified and all agreements were lost leaving many Catholics bitter and mistrustful of the English (Coohill, 2002). By the end of the 17th century Catholics owned 20% of the land in Ireland but further restrictions in Acts passed in 1704 and 1709 resulted in Catholics owning merely five percent of the land in Ireland by 1778 (Coohill, 2002).
While land restrictions limited Catholic opportunities, hiring practices were similarly restricted to Protestants by landowners. It was not until political reforms in 1793 that Catholics could even cast a vote while they were still prevented from sitting in Irish Parliament, the judiciary, or state positions (Coohill, 2002). These restrictions created resentment and polarization of the communities.

The relaxing of some laws and the increase in Catholic employment in the linen trade eventually lead to the beginning of sectarian violence in Ulster as early as the late 18th century. A group called the Peep O’Day Boys began to attack Catholics in Armagh in 1784 and violence lasted until 1794 in protest of Catholics taking jobs that may have been Protestant positions. An offshoot of the Peep O’Day Boys was a group that later came to be founded as the Orange Order, a Protestant defense society named in recognition of William of Orange’s victory at the Battle of the Boyne which continues to figure prominently in the politics of Irish history to this day (Coohill, 2002). The Orange Order was described as one in which Protestants of Ulster banded together in order to protect their lives and property against the Irish who looked upon them as confiscators (Ferriter, 2004). The Order feared that Catholics posed a threat of confiscating prosperous industries and property. Partisan violence was well established by beginning of the 19th century and contributed significantly to the evolving reality of Irish society, particularly in the north (Bartlett, 1992).

By the mid-19th century more nationalist minded organizations began to appear around the country which believed that the backbone of a nation was a strong sense of national identity which should include everyone who lived in Ireland including Catholics, Protestants, landowners, and tenants (Coohill, 2002). The reality however
was that local charities, political organizations, and clubs were largely divided along Catholic-Protestant lines.

The potato famine of the mid-19th century devastated the country as many died or were forced to leave as the potato crops rotted and died leaving little food for the average Irish man, woman, and child. The political causes beyond the failure of the crop itself has provided fodder for history books and reinforce the division between the wealthy and the poor and the disastrous consequences for those who had little means of survival in comparison to landowners, many of which remained Protestant. Queen’s University Belfast scholar Liam Kennedy (2012) goes so far as to make a connection between the potato famine and the holocaust of World War II. Making links to the intentionality of the state in each atrocity, Kennedy (2012) makes a case for the famine being a case of genocide on par with other instances of mass, ethnically driven murder such as the holocaust and the genocide in Rwanda (Kennedy, 2012).

A further division between the province of Ulster in the north and the rest of the country during this time was the industrial revolution that took hold in the north beginning with linen, engineering, and shipbuilding. In 1911 Protestants in Ulster accounted for 56.33% of the population many of whom were descended from the original planting of Scottish and English Protestants in Ulster after the Flight of the Earls (Ferriter, 2004). The many Anglo-Irish Protestant landowners in the north attracted investment from Britain as important industries were established. The bulk of industry was controlled by unionist Protestants in the north east while Catholics were generally employed in low-wage jobs (Coohill, 2002).

The divide between the living conditions of Catholics and Protestants was further perpetuated by the Catholic Church, whose held significant influence over the Catholics
throughout Ireland. Catholic priests seemed to place a strong emphasis on the values of the farm society which gave rise to a distrust of modern, industrialized society (Ferriter, 2004). Despite a growing modern society and the establishment of industry and well-paying jobs and the development of a modern economy, the Catholic Church delayed modernization because of the interpretation of the Church’s opposition to materialism, consumerism, and individualism (Inglis, 1998).

It was during this time that Fenianism began to take hold which sought to overthrow British rule in Ireland (Coohill, 2002). Fenians thought that Britain would never relinquish control of Ireland so they committed to violent reform. Small local groups with local leaders were organized in military style and martyrs were celebrated throughout the countryside by citizens and the clergy alike as the Fenian ideal of armed struggle took hold of the national psyche (Coohill, 2002). This ideal evolved into various incarnations which have become the Irish Republican Army (IRA) and Loyalist defense organizations such as the Ulster Defense Association (UDA) and the Ulster Volunteer Association (UVA) which continue to figure prominently in Irish politics and modern violence.

**Cultural and Sport Revival**

The early 20th century brought a renewed interest in the creation of an Irish identity through literature, the promotion of the Irish language, and the organization of traditional Irish athletic games. Under British rule the speaking of the Irish language was forbidden as was the playing of Irish games such as Hurling and Gaelic Football. Keeping these traditional pursuits alive was as much about defiance of English rule as it was about the preservation of traditional cultural and athletic pursuits. The Irish language was outlawed for a time under English occupation as it nearly became extinct except for
in small Irish-speaking communities called Gaeltacht areas around the country. A scene in “The Wind the Shakes the Barley,” the Palm D’Or winning Irish film set in Ireland during the revolutionary years of the early 20\textsuperscript{th} century depicts the deep divisions between the Irish people and the British occupiers. The political volatility of the Irish language versus English is depicted in the scene as British soldiers in the countryside round up young Irish men suspected of being involved in revolutionary activity. When one man refuses to identify himself in English insisting on doing so exclusively in Irish, the soldiers torture and kill him (Laverty, 2006). The Irish language was seen as non-British in a defiant sense and a symbol of distinctive Irish culture (English, 2004). The language represents a special symbolic position in the definition of a distinctive Irish identity (O’Reilly, 1997). The recognition of the power of language by the people of Ireland ignited interest in the language as distinctiveness and separation from English were seen as a means to autonomy. While Irish language represented a link to cultural and historical roots it was loaded with political tension and opposition against British rule.

The goals of the Gaelic League were to retain and support the Irish language wherever it was spoken in Ireland and to promote the language as the spoken language of the country. According to a census in 1891, only 66,000 people spoke Irish alone as the members of the Gaelic league sought to further an appreciation of the language and Irish history, something which had not been part of Irish schools until the early 1900s (Ferriter, 2004). The organization attempted to create conditions for the Irish language to become the predominant language of the country as a form of de-Anglicization of the country (Coohill, 2002). A sign of success is the fact that the Irish language became a central part of Irish education and a compulsory subject by 1909. By the 1920s an acceptable fluency in Irish was required for the civil service as well as some professions and university
positions. Irish history was taught in schools in a nationalistic way as a noble struggle against the British oppressor while public opinion began to recognize being Irish synonymously with rural life, agricultural economy, and the Catholic religion (Coohill, 2002). The division between the industrialized Protestant north and rural Catholic south grew deeper as Catholic republicans pursued a cultural revolution while loyalist Protestants sought to further isolate themselves, industrialized society, and religion under British rule. The Gaelic League was seen by some such as Louis Paul-Dubois, a travel writer at the time, as promoting propaganda which would result in a national renaissance based on a national language (Paul-Dubois, 1908). The Gaelic League managed to instill pride in the cultural legacy of Irish ensuring that those who were not proficient could at least speak and read enough to feel culturally Irish.

Another major organization that rose to prominence and deepened the division between republican Catholics and unionist Protestants was the Gaelic Athletic Association (GAA). The GAA and the Gaelic League were important because they drew young people into the national movement and political advancement and cultural enrichment required membership in both organizations at that time (Ferriter, 2004). The GAA became a hugely successful athletic organization which promoted traditional Irish games such as hurling and Gaelic football. The attendance at GAA matches on a per capita basis rivals those at Melbourne Football, the largest in the world at the time (Murphy, 1988). The GAA was regarded as a political organization as well as an athletic one in part because the league banned players from participating in other games such as rugby or soccer as foreign games. A 1901 GAA convention called upon the young men of Ireland not to identify themselves with any rugby or football association or any other form of imported sport so as not to negatively impact the national sports of the country or
adopt foreign customs (Ferriter, 2004). The GAA became a nationalist organization as hurlers and footballers became the athletic stars of the early twentieth century and they continue to be today.

**Rebellion and Civil War**

On Easter Monday 1916 rebel volunteers, intent on ending British rule of Ireland captured the General Post Office (GPO) in Dublin as well as other strategic sites in what has become known as the Easter Rebellion. The GPO became the headquarters of the rebel forces and it was here that Patrick Pearse, leader of the rebel forces, read what has become famously synonomous with Irish nationalism and independence: The Proclamation of the Irish Republic. British reinforcements were called from Belfast and throughout Ireland and the rebels retreated from the GPO by April 28 (Coohill, 2002).

The Easter Rebellion and the Proclamation of the Irish Republic marked the organizational beginning of violent resistance to the British and the movement toward military tactics to wrestle authority from Britain. The rebel participants were volunteers who made up members from every walk of Irish life. Though they were defeated and many of the leaders killed by the British, they were regarded as noble martyrs in the struggle for independence as they became blood martyrs for the cause of Irish independence. The Irish Volunteers became known as the Irish Republican Army (IRA) and in 1919 they began a guerilla war against the British government in Ireland which became known as the Anglo-Irish War of 1919-1921 (Coohill, 2002). The IRA focused primarily on the Royal Irish Constabulary (RIC), the paramilitary force in Ireland, by attacking barracks, stealing weapons, and killing RIC officers and constables. The British in return sent more troops to Ireland to support the RIC. These reinforcements wore khaki brown pants and dark black tops due to a uniform shortage in Britain and became
known as the Black and Tans. The Black and Tans fought a counter guerilla war and became famous for their brutality in retaliation for IRA attacks so much that British public opinion was often shocked by their actions and Irish nationalists became further entrenched in their hatred of the British as stories of the Black and Tans’ brutality eclipsed those of the IRA amongst the majority of Irish (Coohill, 2002).

In July of 1921 a truce to the Anglo-Irish war was called by British Prime Minister Lloyd George. The leader of the Dail (the newly established Irish Parliament) Eamon De Valera was offered dominion status within the British Empire much like Canada. Though this offer was rejected, treaty negotiations in October of that year were agreed to. When Collins rejected the offer after presenting to De Valera and the Dail, George threatened war between Britain and Ireland within three days of the offer (Coohill, 2002). Knowing the IRA’s resources were depleted and war would result in inevitable loss of life and political power, Collins agreed to the Anglo-Irish treaty on December 6, 1921 which essentially established the Irish Free State (which would later become the Republic of Ireland) and the Province of Northern Ireland (which would later become Northern Ireland) as separate political entities officially for the first time (Coohill, 2002).

Though it can be argued that the connection between the Easter rebels and the modern IRA has been overstated (Garvin, 2005) the modern campaign often referred to as “The Troubles” beginning in the 1960s can trace their roots of support and rhetoric back to the Easter rebels and the campaign against British rule.

Though popular Irish culture celebrated the rebels as Irish heroes scholars have argued that Pearse and his rebels did more harm to potential Irish unity than good as it was politically damaging and lead to partition as fervent nationalists were regarded as never being able to accept anything short of the overthrow of the British government (Shaw,
1972). An Irish Independent poll in 1991 suggested that while Irish people look back on the Easter Rebellion with pride, only 27% felt that it made the situation in Ireland any better (Kiberd, 1991). However to unionist scholars (Stewart, 1997a) the partition of the country was in some ways inevitable based upon the major differences between the two parts of the island. The industrialized northern industries contrasted greatly with the rural south resulting in a distrust of any government from the rural south being able to run the more sophisticated north-east Ulster economy which made it difficult for British politicians to consider a united Ireland run from Dublin (Gallagher, 1974).

A People Divided

Though Northern Ireland enjoyed a relatively modern economy after the partition Northern Irish society was based on inequalities between Protestants and Catholics which would cause resentment and violence from the end of the 1960s until the end of the 20th century (Coohill, 2002). Catholic citizens of the North were not only not loyal to the government but also not regarded as good citizens. Political measures were taken after partition to limit the political power of Catholics such as largely unionist business owners being given extra votes for owning business property and the redrawing of constituency boundaries to guarantee unionist majorities and political victories resulting in Prime Minister James Craig calling it a Protestant parliament for a Protestant People (Coohill, 2002). The IRA continued its violent campaign to disrupt the government while the British government responded by sending in more troops which established the armed police force. By the end of 1922, over 200 people were killed and nearly 1,000 wounded as a result of IRA and British struggles and by the next decade IRA violence moved to targets in England killing 137 in 1939 alone (Coohill, 2002).
On Easter Monday 1949, the official name of the 26 counties in the south changed to The Republic of Ireland and then the British government passed the Ireland Act which officially recognized that Ireland was no longer part of the British Dominions but also that the six counties that make up Northern Ireland would remain part of the United Kingdom (Coohill, 2002).

The divisions amongst communities became more distinct as Catholics rarely mixed with Protestants as they live in separate communities. Orange Order parades through Catholic sections of town were met with violence while unionists engaged in reprisals in the 1930s with several deaths reported as a result of rioting in 1935 (Coohill, 2002). There were separate clubs, neighbourhood schools, shops, associations, professions and just about all aspects of daily life (Coohill, 2002).

The Northern Ireland government instituted policies that discriminated against the Catholic minority in Northern Ireland in order to keep the sides away from one another as tensions and violence grew (Bew, Gibbon, & Patterson, 1996). By 1993, it is estimated that one half of 1.5 million people in Northern Ireland lived in areas more than 90% Protestant or 95% Catholic with fewer than 110,000 people living in areas with roughly equal numbers of Catholics and Protestants further perpetuating cultural blindness (Ferriter, 2004). Catholic and Protestant Deaf children are in fact taught different sign languages as dialogue of any kind has long been discouraged (Ferriter, 2004).

Groups such as the IRA and UDA were so focused on keeping communities segregated that they attacked and intimidated members of their own community for fraternizing with the opposite community. The most violent example is the death of the Quinn brothers in 1998 who were burned to death after their house was petrol bombed because they went to school with Protestant children in a mixed school and had Protestant
friends. When they participated in the building of a loyalist bonfire on the evening of July 11, 1998, their house was set ablaze and all three boys died (McKay, 2000, p. 78).

“The Troubles”

While mistrust and tension grew for decades the end of the 1960s marked the escalation of violence and the beginning of a time known in Northern Ireland as “The Troubles”. What started as civil rights protests by the Catholic population quickly escalated into violent confrontations between Protestants and Catholics, the police and British army. In August of 1969 the Northern Irish government asked the British government to send troops in to help restore order. In many Catholic areas of Belfast and Derry the British troops were welcomed as protection from the police and unionist paramilitary groups. However frequent arms searches of local Catholic homes ended any goodwill. The first British soldier was killed on February 6, 1971 and bombing campaigns by the IRA began around the province (Coohill, 2002). Suspected members of the IRA were imprisoned without trial or charge and retribution from loyalist groups further encouraged young nationalists to join the IRA.

The day that polarized the unionist and republican communities is referred to as “Bloody Sunday” January 30, 1972 in Derry when 13 civilians were shot dead by British soldiers during a civil rights protest. Demonstrations against the killings were held across Ireland and the British Embassy in Dublin was burned down on February 2, 1972 as a result. In March of that year the British government took political control of Northern Ireland and suspended parliament. The IRA responded violently and in response to IRA actions Protestant militant groups such as the Ulster Volunteer Force (UVF) and new groups such as the Ulster Defense Force (UDF) were revived and the Ulster Defense Association (UDA) were formed in the aftermath of Bloody Sunday.
Killings, beatings, and intimidation were a regular part of life during the 1970s as the loyalist groups and the IRA carried out attacks on pubs and police stations alike as well as against members of their own communities who did not support their goals or means. The period witnessed the rise of the Shankill Butchers; Ulster Volunteer Force killers who hacked victims to death with knives and axes while the IRA targeted Protestant pubs killing innocent victims (Ferriter, 2004). Living in divided communities at the time meant living in fear of being in the wrong place at the wrong time and caught up in the regular incidents of violence.

My wife was living in Belfast in the 1970s and remembers soldiers on the streets with machine guns in their hands, the sound of gunfire and explosions and having to quickly leave a shopping area when a bomb warning was issued. Any shopping district, church, community centre, or playground could be turned into a battlefield or a bomb site as locals hurried about their business with a sense of impending dread. As a physician in the city, my future father-in-law witnessed the brutality of The Troubles first hand as victims of bombings, shootings, and beatings became too much to take on a regular basis. The hospital he worked in was a teaching hospital and became world-renowned for being the best place to learn about how to treat gunshot wounds. Before the end of the decade my wife and her family moved to Kingston, Ontario in order to escape the seemingly never ending cycle of violence in Northern Ireland.

As my wife and her family can attest living in Northern Ireland during this tumultuous time meant living in constant fear. As one interviewee stated to Susan McKay (2000) in her book Northern Protestants: An Unsettled People, “my growing up was segregated, suspicious, surreptitious, sneaking about, knowing where you could go and where you couldn’t. One wee piece of violence a day, a bomb, a murder. It
absolutely paralyzed a psyche” (p. 336). By the end of the century Protestants were feeling generally more vulnerable and politically fragile than at any other time since the first threat of Home Rule at the beginning of the century (Ferriter, 2004).

Both the IRA and loyalist paramilitaries could be brutal in their attacks on each other and members of their own communities. While the IRA would place bombs under the cars of security forces or bomb pubs, the Shankill Butchers killed 33 people and injured 100 more on one single day in 1975 detonating bombs in Dublin and Monaghan (Ferriter, 2004).

**Toward a Shaky Peace and a Good Friday**

While the struggle for independence from Britain or the maintenance of those links occupied the collective conscience of the Irish people for centuries it began to diminish somewhat after the partition of the Free State and Northern Ireland and even further with the establishment of the Republic in 1949. The violence perpetrated by the IRA, UDA, UVA, British military and paramilitary groups became increasingly specific to the six counties of Ulster that made up Northern Ireland.

By the 1990s Britain had no strategic or economic interest in Northern Ireland and only held on to the province as a part of the United Kingdom as long as the majority of the people there wished to remain so. Parliament was re-established at Stormont as Westminster kept Northern Irish politics on the fringes of official policy. The long held hatred refused to cede any ground to either side though despite the indifference of the British. Republicans remained committed to the idea of an independent Ireland that included all 32 counties while Anglo-Irish in the North resisted any withdrawal from the United Kingdom or any notion of sharing political power with those who had been responsible for violence and bloodshed. Despite steadfast ideological differences, more
than ever on both sides were united in their wish for the end of violence and a lasting peace in the North.

In 1994 both the IRA and loyalist paramilitary groups called a ceasefire which was nearly very short lived as another standoff between Orange Order parades and republicans in Catholic areas of town Portadown County Armagh ignited old hatred and rioting. Hopes were high again in 1996 of movement toward a peaceful resolution until the IRA ended its ceasefire with a bomb in London’s Canary Wharf financial district and another standoff over marches in Drumcree County Antrim.

The march toward peace continued with high profile intervention from Bill Clinton, Tony Blair, Sein Fein’s (the IRA’s political party) Gerry Adams, and Northern Irish Prime Minister David Trimble which resulted in the eventual signing of the Good Friday Agreement on April 10, 1998. This agreement affirmed the right of the people of Northern Ireland to determine their own future and made official the devolution of power from Britain to the Northern Irish parliament at Stormont while the Republic agreed to give up its constitutional claim on the Northern provinces. Republican nationalists overwhelmingly supported the Agreement while the unionists were split. A referendum was held on May 22 which sought input from voters in both the Republic and the Northern Ireland which indicated strong support for the Agreement—94% voted in favour in the Republic and seventy one percent in favour in Northern Ireland (Coohill, 2002).

Conflicts continued over the annual parades which marched through traditionally Catholic parts of town highlighted by another standoff in Drumcree County Armagh. A standoff between Orange Order marchers and the Royal Ulster Constabulary (RUC) and the British Army resulted in the death of three young boys who were being raised Protestant but had a Catholic mother. A petrol bomb was thrown through the window of
their house and the RUC deemed the incident one of sectarian violence (Coohill, 2002). Despite the signing of the Agreement and the promise of weapons decommissioning by both the IRA and loyalist groups The Troubles continued in the form of a massive car bomb explosion in Omagh, County Tyrone on the 15th of August, 1998. A warning call was placed announcing the presence of a car bomb in a busy pedestrian shopping district in Omagh. The warning was taken seriously and people were quickly evacuated away from the reported bomb site. Unfortunately the call was meant to funnel people toward the actual bomb location where the most damage could be inflicted with the single blast. As shoppers attempted to flee from the suspected bomb location they were instead lead to the centre of the blast. The result was the single deadliest day since the Troubles began in 1969 with the death of twenty eight people and serious injuries to over two hundred. The Real IRA, a splinter group of the Official IRA, claimed responsibility for the attack. The incident was widely condemned by all sides, including Sein Fein and the Official IRA. Despite the addition of another massive tragedy to the people of Northern Ireland the event galvanized both sides together in revulsion and condemnation of further violence and arguably pushed the peace process even further toward acceptance.

**Beyond Good Friday**

Despite promises from the Official IRA to put all weapons beyond use in 2000, violence continued into early 2001 when there were nearly daily reports of pipe and car bomb attacks in Northern Ireland though they appeared to be more targeted at families or specific targets such as those connected to the police force or seen as supporting the other side. Many in the North wondered whether violence was so much a part of the lives and consciousness of some people in Northern Ireland that it could never be eliminated (Coohill, 2002).
The decommissioning of weapons began in October of 2001 and the IRA issued an apology statement in March of 2002 for the killing of 650 civilians since the late 1960s and in July of 2005 the IRA confirmed that all weapons were beyond use and committed to achieving their goals through peaceful and political means (Coohill, 2002). However, many in Northern Ireland, especially Protestants were skeptical of returning to violent ways. Former Taoiseach (Prime Minister of Ireland) Garret Fitzgerald argued in his Toward a New Ireland (1973) that a significant group of Ulster Protestants essentially mistrusted the rest of the country, afraid of what would happen to them under a Catholic dominated state suggesting that the formal and informal influence of the Catholic Church should be reduced.

Scholars (Stewart, 1997a) have argued that the cause of the Troubles are within Northern Ireland and can be traced back to the initial plantation of Scottish and English settlers and the clash of cultures. Native Irish were supplanted from the land in favour of English and Scottish settlers who would eventually become known as Anglo-Irish creating a power imbalance between the haves and the have-nots. While Anglo-Irish Protestants instituted policies aimed at keeping native-Irish Catholics from gaining political and economic momentum, the divide isolated and kept groups segregated while allowing distrust to grow. These plantations were intended to build British supremacy in Ulster which could be the basis for the dominance of the rest of the island. The consequent economic and political attempts at suppression lead to bitterness which came to epitomize the two groups over time (Moody, 1974). Northern Irish land and business owners’ best interests involved keeping the population divided by raising Protestant fears about Catholics whenever it appeared that workers might unite and making sure that Protestant workers were less discriminated against than Catholics (Farrell, 1980).
Traditional unionists felt that the only way to defend Protestant interests is to remain separate from the Republic.

While the economy in the Republic was strong during the late 1990s until the mid to late 2000s often referred to as the “Celtic Tiger” and the Northern Irish economy transitioned from industry to technology, Northern Ireland enjoyed the longest period of peace since before the beginning of the Troubles. With the Good Friday Agreement signed, a strong job market, food on the table a car in the garage and a mobile phone for everyone, talk of a united Ireland or defending the North dissipated. A new generation of boys and girls began to go off to school never having heard a bomb explode and both the government of Northern Ireland and the Republic instituted policies aimed at dissolving boundaries and connecting across the border. The actual border between Northern Ireland and the Republic which was once littered with checkpoints and a military presence delineating the two countries was removed in the years after the Good Friday Agreement. When driving from Dublin to Belfast today the only indication that you have crossed the border is revealed by signs offering currency conversion from the Euro to Pounds Sterling.

Though there was over 10 years of relative calm in Northern Ireland since the Omagh bombing in 1998, hatred, resentment, mistrust, and old wounds remain between communities which remain staunchly divided to this day. Anyone who lived in Northern Ireland during the Troubles has a personal story of friends or family affected by the violence or a personal tragedy or near miss. Images of bloody streets, broken glass, a fear of crowds, and holes in bodies where no holes should be are forever seared into the minds of so many men and women in Northern Ireland today. Murals on the side of housing estates glorify Catholic martyrs and freedom fighters or Protestant paramilitaries as defenders of honour, God, and
country. Labels of terrorist or martyr, criminal or victim simply depend on the perspective provided ancestry, religious identity, last names, and the school attended.

Despite never having to run from a bomb threat, children in Northern Ireland are still raised in segregated communities with little to no contact with the other community. The parents of contemporary youth have their own stories about living through the Troubles and can carry long-held hatred and beliefs about the other community. Having lived their entire lives fearful of violence from the other side, the signatures of politicians and promises by terrorist organizations that the war is over has done little to heal wounds and mend fences.

**Education, Peace, and Simmering Tensions**

While the years since 1998’s Good Friday Agreement have brought relative calm to Northern Ireland, an undercurrent has continued to simmer below the surface. Belfast has been named a European city of culture and the Northern Ireland Tourist Board has embarked on an ambitious campaign to bring tourists to visit the North to enjoy natural wonders such as the Giant’s Causeway and Mourne Mountains and man-made landmarks such as the Bushmills Distillery, the Harland and Wolfe shipyards, and the Titanic exhibit. Photographs of craggy cliffs, fields of sheep, world class golf courses, and beautiful young men and women surfing greet passengers waiting to reclaim their luggage in the Dublin airport while summer college students hand out Northern Ireland travel brochures in the arrivals section. There are even advertisements for “black taxi tours” which provide private guided tours through the neighbourhoods made famous by the Troubles and remain segregated today such as the Catholic Republican Falls Road and the Protestant Shankill Road and Sandy Row. Visitors are greeted by large ornate murals glorifying IRA martyrs, hunger strikers, and balaclava-wearing men holding machine guns beside the Red Hand of Ulster. While embracing the Troubles as historical,
businesses and tourism in Northern Ireland attempt to convince visitors to Ireland in Dublin to take the short drive north to beautiful countryside, lively nightlife, outdoor activities, and a friendly welcome.

Despite attempts to share power and broker peace, segregated communities continue to distrust one another as long held beliefs and biases are passed to the next generation. While the Official IRA sit in government as representative of the political party Sein Fein alongside former UDA paramilitaries who have disavowed violence as a means to achieve their goals, dissident groups remain committed to armed struggle and furthering their cause through military attacks. Groups calling themselves the “Real IRA” have proclaimed their intention to carry on the armed struggle for independence from Britain while Ulster Volunteer organizations such as the UVA and Apprentice Boys vow to fight to defend their communities and their right to remain British.

I spent the summer of 2010 in Ireland researching, conducting interviews, and reading. Despite the Northern Irish Tourist Board assailing me at the Dublin airport with assurances that all was peaceful in Northern Ireland, daily newspaper articles begged to differ. Each morning I opened the paper to read about incidents occurring in Northern Ireland involving bomb threats, dissident and paramilitary groups, and opinion essays decrying the imminent return to the Troubles. Articles in The Irish Times and the Irish Examiner newspapers such as “Booby Trap Device Falls from Soldier’s Car in Bangor” (Keenan, August 5, 2010), “Five Dissident Republicans Held After Arms Find” (Murray & Regan, 2010), and “Pipe Bomb Explodes in Antrim Town” (Keenan, August 13, 2010) reported targeted attacks on soldiers, the accumulation of weapons by dissident groups after the official decommissioning of weapons after the Good Friday Agreement and the return to violence and intimidation. The politics of peace talks with dissident splinter
groups and the rights of one group to continue to parade in front of another were highlighted in articles such as “Dissident Republicans Play down Possibility of Talks With Sein Fein” (McCaffery, 2010), while opinion articles such as “Debate on Republicanism Still Dominated by the ‘Split’” (Adams, 2010) and “Dissidents and Politicians Know Talking is Inevitable” (Keenan, August 10, 2010) complete with a full-colour photo of men dressed in green military fatigues, berets, sunglasses, and tight scarves covering their faces while holding republican flags discussed the return of violence and debated the question of the existence of a national identity. By the time I arrived back in Canada at the end of August, articles in the Globe and Mail such as “Dissident Irish Planning UK Attack, MP Says” (2010) reported increasing tensions and heightened awareness of a return to violence.

After centuries of division, battles, war, debate and decades of violence in the streets, towns and villages in Northern Ireland, the possibility of simply erasing memories and generations of hatred and distrust appears unrealistic for the current generation who lived through it or grew up with stories from parents who did. While politicians attempt to collectively come to grips with what transpired through inquiries and commissions intended to air the truth in order to move on, old wounds are opened with increasing regularity. One inquiry reported collusion between the Catholic Church and the state to cover up a priest’s involvement in devastating car bomb attacks in Claudy, Northern Ireland in 1972 (Bowcott, 2010) flaming simmering tensions by implying a direct link between church officials and terrorist attacks. The Saville report on the infamous “Bloody Sunday” massacre when 13 unarmed Catholic protesters were killed by British soldiers was commissioned in 1998 after the signing of the Good Friday Agreement and is perhaps the most famous and controversial example of how decades old wounds can be
re-opened. The inquiry was intended to investigate and re-open these wounds in order to allow the air of truth to aid in the healing process. After many years and millions of pounds spent on the inquiry, the Rt. Hon. Lord Saville along with colleagues Hon. Mr William Wright and Hon. Mr John L. Toonhey (2010) released The Report of the Bloody Sunday Inquiry. Thirteen young men were killed that day, three of which trampled by military vehicles and five of which shot in the back. Subsequently the report found fault in the actions of the British military contrary to the official version after the incident in 1972, meaning that criminal charges may now be laid against soldiers responsible (Saville et al., 2010). British Prime Minister David Cameron made a formal apology on behalf of the people of the United Kingdom as a result of the release of this inquiry report. While some applauded the investigation’s findings others decried the amount of money and time it took to complete while other questioned the necessity to fan the flames of sectarianism by assigning guilt and blame. Despite the Northern Irish Tourist Board’s images of carefree vacationers enjoying lively cities, golf course, beaches, and the picturesque countryside, the next generation of Northern Irish risk inheriting the biases, assumptions, and mistrust of previous generations.

**Education and the Peace Process**

The education system has been regarded as a way to promote peace in Northern Ireland almost from the first outburst of violence. Young children in Northern Ireland are influenced from an early age by cultural and political events and symbols (Connolly, Smith, & Kelly, 2002). Divisions are made and understood at an early age. The knowledge of which school a person attended as a child remains one of the most effective ways to determine the religious and cultural background of anyone in Northern Ireland and that knowledge is used as a reference point for any future employers (Richardson,
The system segregates children at an early age and is defended by many within both communities as being important for solidarity and security (Richardson, 2011a). In a society in which the education system provides the key differentiator between individuals, it is not surprising that some have sought to use education itself as a way to challenge these divisions (Richardson, 2011a). School programs aimed at connecting communities and diminishing differences have been established and built upon throughout the thirty years of war and beyond.

Two mutually exclusive school systems have long been the norm in Northern Ireland divided along ethno-religious lines. These systems have been described as the “outward manifestations of a deeper divergence of identities between Protestants and Catholics” (McEwan, 1990, p. 133). Desegregation was the goal as far back as the early 19th century in which a nation school system was established that would cater to all and then again in 1923 with the new Northern Ireland government as they tried to establish non-denominational schools. All attempts ultimately failed (Gallagher, 2011). While there has been a history of concerted efforts toward integrated, non-denominational schools dating back to the late 1970s early 1980s, as of 2011 only 6% of the total pupils enrolled in Northern Ireland are in integrated schools (Gallagher, 2011). Beyond the integrated schools, projects such as the Inter School Links project which was established in 1986 have attempted to encourage contact between Catholic and Protestant children and schools (Gallagher, 2011). The term “peace education” was introduced to Northern Ireland by 1978 (Richardson, 2011a). A common curriculum initiative called “Local and Global Citizenship” was introduced through the University of Ulster in 1998, “A Shared Future” policy strategy aimed at preparing pupils for life in a diverse and inter-cultural society, and now there is a common curriculum in all schools called “Education for Mutual
Understanding” as school were seen as places of calm where students could be removed from the terrible things that were going on outside the walls (Richardson, 2011a).

Those who attempted to created integrated schools during the violence of the Troubles experienced frustration and disappointments in trying to make effective inroads into educational and community insularity (Richardson, 2011b). The divide between communities extended into the curriculum. The official education policy in Northern Ireland worked against the teaching of Irish History in schools. History teachers in schools serving Protestant communities were generally happy to avoid Irish history entirely while Catholic school either omitted it too in line with the curriculum or covertly taught it with strong Irish nationalistic interpretations (Richardson, 2011b).

Many of the attempts to integrate and work toward mutual understanding within the education system have been met with criticism and opposition. Those who object to the use of the education system for peace education and mutual understanding do so in three common ways. They perceive the initiatives as manipulative, propagandist, and superficial or irrelevant (Richardson, 2011c). Much of the opposition came from within the Protestant community who feared being overwhelmed by Catholic culture on the island as a whole, despite being in the majority in Northern Ireland. Opposition was fierce and described attempts to implement Education for Mutual Understanding as a violation of the rights of protestant parents and comparing common curriculum and integration strategies to brainwashing children while placing the blame for violence squarely on the shoulders of the Catholic community (Richardson, 2011c). There existed a belief amongst the protestant loyalist community that contact with the Catholic community and curriculum work that promoted it represented a deliberate attempt to destroy their culture (Richardson, 2011c).
Opposition did not only come from external community groups, but also from teachers themselves who expressed fears of being unfairly and unrealistically expected to be able to achieve a level of harmony within their schools and communities that had not been accomplished in generations. The problems and pressures were much too deep to be adequately handled by teachers (Richardson, 2011c). Moreover, there was a cynicism surrounding schools embarking on inter-community projects because money was associated with them. Schools were seen as involving themselves in order to receive additional funding without any intention to make real strides toward cross-community relations (Richardson, 2011c).

Northern Ireland educational scholar Norman Richardson (2011d) suggests that any future success in implementing curriculum, policies, or projects meant to connect communities, integrate pupils, and educate students for the diverse world will require strong educational leadership. An identified difficulty was the lack of informed and committed leadership in many schools, without which even the most enthusiastic teachers would meet with little to no success (Richardson, 2011d). There has been little to no priority given to ensuring that courses for principals and senior leaders have included this dimension of education (Richardson, 2011d). However, at the time of writing this study, the Welcoming Schools Project was beginning at schools throughout Northern Ireland. With the support and leadership of Invitational theorist and author Dr. John Novak, school leaders in Northern Ireland were being encouraged to begin the process of creating inviting schools. While this project is in its infancy, it reveals a move toward supporting welcoming schools in Northern Ireland through the support and leadership of principals. Since this project has just begun at the time of writing this, there is no indication of successes or failures as of yet. The fact that this project is
underway, however, is encouraging as it recognizes the immense impact leaders have on creating inviting and welcoming schools, a worthy goal that has been pursued in Northern Ireland for generations.

**Literature Review Conclusion**

A study involving educational leadership requires a consideration of the evolution of the concept of leadership and the various ways in which scholars have contributed to the literature in the field. Invitational leadership theory has most influenced my practice as a school leader yet receives relatively little attention in academic and educational circles outside of the Invitational Alliance and the Journal of Invitational Theory and Practice. Much of the published literature on inviting theory has been conducted from the outside looking in through the perceptions of teachers to inviting leaders, the perceived impact of an inviting culture on student performance. There has been, to date, no comprehensive examination of invitational leadership through the lens of a practicing leader. A first person narrative approach to autoethnography provides a unique perspective and as such makes an important contribution to the literature on inviting leadership theory.

Invitational leadership theory has influenced my leadership so significantly that I became a thoughtful, more capable and confident leader through the study of this theory and the intentional implementation in practice. Similarly, Billy Tate reached out theorist and scholar John Novak to thank him for introducing invitational leadership theory as Billy prepared to travel to London to be made a Member of the British Empire in recognition of his educational leadership in Northern Ireland. Understanding the key concepts, limitations, critiques, and challenges of an inviting approach to leadership as presented in this literature review provide essential context to the rest of the paper as the
foundation on which I continue to lead my school and the lens through which I consider my leadership and the influence on the students, school, and wider community.

The importance of mentorship is also essential to the rest of this paper as I recognize the influence a strong mentorship relationship can have and did have with me and how that relationship can exist and flourish outside of the formal structured program within the board. The positive influence of mentorship is well documented in the literature and highlighted by formal programs in school boards throughout the province as well as is the imperative to recognize the limitations of mentorship though a formal program. It is with this understanding as reflected in the literature that I further connected with Billy Tate outside not only my school board but on the other side of the Atlantic, all in pursuit of the improvement of my practice and a deeper understanding of the influence of invitational leadership.

Since this study explores the leadership of Billy Tate in Belfast, Northern Ireland, a brief exploration of the fractious and, at times, violent history of Ireland provides the context for Billy’s leadership and the influence of inviting theory. The turbulent past of Ireland and the Irish people, particularly in Northern Ireland, continues to influence programs, policies, and people in the country. The past has been so divisive, so violent, and so clearly segregated along religious, economic, and cultural lines that communities remain isolated from one another with little contact between sides. These divisions go back hundreds of years and despite the move toward peace and reconciliation, they remain ever present today. Contemporary peace efforts actively include the education system by challenging traditionally accepted segregations. The Welcoming Schools project provides evidence of the interest in Northern Ireland for leadership that is inviting and welcoming to all. This context provides the setting for Billy Tate’s leadership as his
story, as shared in chapter 4, reveals the influence of inviting leadership in the most uninviting of places.

The first two stories, mine and Billy’s, and their unique contexts have been introduced and established. The literature review provided evidence of the importance of educational leadership and the prevalence within the academy, invitational theory as a theory of practice. The importance of mentorship to leadership development was presented and discussed along with challenges and criticisms, while recognizing the unique mentorship relationship Billy and I developed during that time. Finally, the historical, political, and social milieu of Northern Ireland was explored in order to provide the relevant background knowledge to understand the context in which Billy Tate lived and lead educationally. The third story of this study is revealed in the next chapter, as the story of how it all comes together through an amalgamated methodology.

Chapter 3 explores the methodology utilized in this dissertation. Beginning with a look at autoethnography as an emerging methodology, chapter 3 explores this approach to research and the application to this study. The theoretical foundations of this methodology is explored followed by the emergence of life histories and stories as research. The history and emergence of autoethnography as a research method is then presented and explored followed by a closer look at autoethnography as a way to conduct research. While this dissertation is primarily an autoethnography of my experiences as an emerging invitational educational leader, it also utilizes unstructured interviews with Billy Tate and members of his school and community as well as observational research conducted during my visits to Belfast as well as my own community. These methodologies: autoethnography, interview, and observational research are examined independently in chapter 3 in order to reveal how they interact and interconnect as an
amalgamated methodology. Essentially the interviews and observational research contribute to and are situated within the autoethnography. Ethical concerns, challenges, as well as ethical clearance and permission are then addressed at the end of the chapter.
CHAPTER THREE: METHODOLOGY

When exploring a phenomenon, a variety of methods can be used and it is up to the researcher to select the most appropriate approach to the research in order to fully investigate. When considering the study of the applicability and influence of theory on educational leadership, I endeavored to do so through the most intimate lens possible. Instead of asking others questions, conducting surveys, or researching what others have to say on the matter, I decided to look at educational leadership from the inside through the lens of a practicing school principal and reflect on the influence of theory on the practice of a contemporary school leader. An autoethnographic approach to this study allowed me to reflect and refine my leadership as I committed to living and leading invitational leadership theory. Much of the research cited on invitational leadership in the review of literature focuses on impressions and perceptions of others. Data are collected in a variety of ways, none of which through the lens of a practicing school leader.

When determining the methodology for this dissertation, I considered the reception it would receive within the academy as well as amongst practicing leaders. While gaining more and more acceptance as a scholarly research method, autoethnography is still on the fringes of traditional research methodologies (Hughes, Pennington, & Makris, 2012). Zirkel (2007) contends that practicing school leaders prefer periodicals while peer-reviewed journals remain the preference within the academy. I found myself in an academic dilemma; caught between my perception of being more easily embraced within the academy and the potential to influence practice by exploring the phenomenon of inviting school leadership through a narrative autoethnography. Recognizing the lack of an autoethnographic narrative approach to research in the existing inviting leadership literature, and understanding my proclivity and
preference for storytelling as embedded in my Irish culture, I am uniquely positioned to explore invitational leadership from within. Though I recognize that autoethnography faces criticism within some corridors of the academy (Hughes et al., 2012), I am encouraged by Taber’s (2010) assertion that researchers must push methodological boundaries in order to explore research questions that cannot be as easily or effectively explored with traditional methods. I embraced autoethnography as the main research methodology for this dissertation.

Connecting with Billy Tate in Belfast, Northern Ireland allowed me to further explore inviting theory in a radically different context from my own and allowed for further consideration of the influence of theory on a school and community in a place many would consider uninviting. The consideration of invitational leadership from perspective of a principal leading in a leafy suburb in Southern Ontario combined with the perspective of a principal leading in a sectarian housing estate in East Belfast Northern Ireland provides ample context and contrasts to provide a rich exploration of inviting leadership in practice. I learned from Billy as I interviewed him, his staff, and observed as I spent time at his school, all the while reflecting on how it was influencing my leadership and my consideration of the applicability of inviting theory on practice. As such, this research requires a unique methodological approach which amalgamates interview and observational research, embedding them within an autoethnography. If my story and Billy’s are the first two stories of this study, this amalgamated methodology is the third story, providing a unique approach to research in an attempt to explore invitational leadership theory in contemporary schools.

Recognizing the immense impact educational leaders have on student learning, the enormous responsibility of educational leaders, and the steep and sometimes treacherous
learning curve faced by new and aspiring school leaders, the purpose of this study is twofold. The first is to explore how invitational leadership theory affects practice in contemporary schools. Is there a practical value in the understanding of inviting theory? How has it impacted leadership? In what ways has it made a contribution to student success in contemporary schools? The second is to explore the concept of mentorship to the role of educational leadership. Specifically, how mentorship can be fostered beyond the confines of a school board or district? Can a mentor/mentee relationship established between school leaders who live and work in different countries and in unique social, political and historical context result in increased leadership confidence and competency? In order to begin to explore these questions it is important to understand ways in which school leaders learn in order to determine the most appropriate methodology to employ and be open to the unique ways in which the questions can be explored. If I want this research to influence practicing leaders, it is important to consider the best way to do so.

In 2006 the Ontario Ministry of Education released a report on the implementation of the leadership self-review tool in five school boards (Bodkin, 2006). The report presented the changes in public education in Ontario and outlined a new provincial strategy for reducing the administrative workload for school leaders in order to support them as instructional leaders. The leadership self-review tool was implemented and intended to provide a way to extend leadership conversations beyond school boards on all aspects of school leadership. Upon reflection of the process, all participating boards appear to support three important elements of leadership development: sustained learning is essential for leaders, meaningful support for the increasingly demanding role of leaders is critical, and there is a need to immerse leaders in important conversations about their work (Bodkin, 2006).
In congruence with the priorities identified by the Ministry of Education this study supposes the same: that the support of school leaders involves mentorship which encourages recognizing and reflecting upon learning opportunities, support through relationships with mentor leaders, and conversations which encourage thoughtful reflection.

The questions posed by this study can be explored through reflective practice by an educational leader or leaders, as reflection on experience informs practice (Dewey, 1938; Schon, 1983; Schwartz & Sharpe, 2010). A methodological approach to this could involve the interviewing of an established school leader intentionally implementing theory in practice. This approach would provide an account of leadership but would merely involve the reflection on the practice of another and the inference of successful school leadership. A different methodological approach could involve a personal autoethnography to educational leadership as I, a school principal and author, reflect on my experiences as an emerging school leader. While this methodology would provide a unique personal perspective from the inside, it may be considered limited by my experience and realities and potentially dismissed as academic naval-gazing. In order to adequately address the questions posed in this paper, a unique multi-methodological approach is required.

This paper utilizes autoethnography, interview, and observational research as a unique and creative methodology. As an emerging school leader this paper provides an autoenthographic exploration of my leadership from a terrified rookie principal committed to leading invitationaly to the development of a mentor/mentee relationship with Billy Tate; a veteran school principal at East Belfast Primary School in Northern Ireland. The reflections on my experiences both at my own school and on my visit to
Belfast to meet Billy inform my practice and contribute to the development of my confidence while revealing through stories and experiences the contribution of invitational theory to practice. My interview with Billy at his home in Belfast provides reflections from an experienced school leader and how invitational theory contributed to his practice and success as a principal. Though leading in a unique situation, it is through Billy’s stories and experiences that the universality of his leadership and, by extension, invitational leadership theory is revealed. If Billy can create and foster an inviting school in such a divided community, perhaps it is a theory of leadership which can be more widely considered. This paper also includes observational research as I reflect autoenthographically on my leadership and those around me as well as Billy’s leadership in Belfast as I found myself immersed in the community at East Belfast Primary School in Belfast, Northern Ireland. Interviews were not conducted electronically or over the phone. I travelled to Belfast, Northern Ireland to connect with Billy personally and experience his reality first hand from the barbed wire covered walls and sectarian flags to the territorial murals and paramilitary parents. I interviewed, observed, and reflected on his unique leadership situation, cognizant of the impact it as having on my leadership.

Perhaps most accurately, this methodology is an interview and observational approach embedded within an autoethnography. The result is the revelation of my journey from a naive school principal beginning my tenure, through my reflections on my intentional implementation of inviting theory in my school, to the development of the mentor/mentee relationship with Billy Tate. As I interviewed Billy, observed his reality, and understood his approach to school leadership as unique yet as Norman Denzin (1989a) might suggest, concurrently universally singular or cross culturally generalizable, my leadership evolved. The result is a look at how theory has influenced practice over
time, how the development of a mentorship relationship flourished beyond the confines of
the school board in Southern Ontario to a sectarian school in Belfast Northern Ireland and
how the intentional implementation of inviting leadership in practice has influenced
schools, parents, and students. As the author Mitch Albom (1997) reflects on his
experiences sitting for weekly conversations with his mentor in the book Tuesdays With
Morrie, I grew and continued to grow as an educator, school leader, and human being
through my regular contact with Billy and my conversation sitting in his bedroom in
Belfast in the final days of his life. The interview is more than the words and stories of
the interviewee but also the impact that connection has made on the interviewer. This
creative methodology respects the input each individual methodology has made to
academic literature while recognizing the collective amalgamation of each as a significant
collection to the exploration of the essential questions being discussed.

Experience influences future experiences as we reflect on successes, failures, and
the day to day realities which inform practice. We do not learn in silos but rather through
discernment of the variety of ways in which we gather and process information. It is the
collaborative nature of these experiences which contribute to our learning and create the
methodological approach of this paper.

**Theoretical Foundations**

Experience is perhaps the most influential learning tool as we navigate our way
from cradle to grave. With each new situation and outcome we constantly refine and
reflect. As a toddler learns the hard way that something is hot, individuals from all walks
of life catalogue experiences and draw upon them as each new situation presents itself.
Though narrative qualitative research seeks to minimize the use of a review of literature
and instead focus on the experiences of the individuals (Creswell, 2005), this focus is
grounded in the theoretical writings of pragmatists such as Dewey (1938b, 1958), who regard individual experiences as the key to understanding a person and the world and Aristotle, who argued that a student or researcher should be grounded in knowledge and the experiences of life (Aristotle, trans. 1983). It is through situations and interactions that experience is formed and knowledge is acquired (Dewey, 1938b). The acquisition of wisdom is not confined to contemplation within ethics classes but is rather intimately connected to the real situations faced every day (Schwartz & Sharpe, 2010). In this regard autoethnography, interview, and observational research focus on the individual history or experiences and how they contribute to future decisions.

Our individual perspectives and reflections provide insight into the social, political, and personal. We are a direct reflection of our own lenses through which experience influences. According to pragmatic thinker William James, nothing happens in nature without a reason, as experience and older truths influence our experience (Roth, 1998). Older truths are simply the experiences that each individual gains and catalogues for future reference. The exploration of individual stories informs future practice. Professional collaboration built upon the thoughtful and intentional sharing of stories and experiences influences the learning process as we learn through ourselves and others.

The methodology section presents how a methodologically amalgamated approach to school leadership research supports these goals and best reveals the enormous demands on school leaders by inviting leaders into the important conversations about educational leadership. In order to appreciate this methodology as the amalgamation of these three research methods it is important to understand each individually and the strengths and challenges inherent within them.
Stories, Narrative, and the Emergence of Autoethnography as Research

In his book *A Whole New Mind*, Daniel Pink (2006) argues that our world has changed from being dominated by facts, numbers, quantifiable data, and logic to increased value on creativity, art, emotion, and stories. In the post-industrial, post-knowledge-economy world in which manufacturing has moved off shore with knowledge economy and technology-focused work following, a priority must be given to those who can innovate and create rather than recite and compute. Pink refers to this new age as the conceptual age (Pink, 2006). Future leaders, according to Pink will not hold MBAs but instead may hold MFAs and advocates for the awakening to the power of narrative.

Pink (2006) conducts a small experiment with the reader in the book when on page 101 he asks the reader to answer two questions based on earlier chapters. One is a number fact and the other is a concept. The questions reveal, as was the case with me when I read the book, that data was easily discarded by my passive brain but the information presented in the form of a story was retained without cognitively intending to do so. Stories are a natural way to explore phenomenon and to get at the heart of an idea in a way that connects with others. Much of our thinking, knowledge, and experiences are organized as stories (Turner, 1996).

According to Pink (2006), stories exist where high concept and high touch intersect. We are our stories and when utilizing them we are freer to seek a deeper understanding or ourselves and our purpose (Pink, 2006). What begins to matter more is the ability to place facts into context and to deliver them with emotional impact (Pink, 2006). In the book *Things That Make Us Smart*, Don Norman (1994) suggests the importance of stories as being able to encapsulate within the story information,
knowledge, context, and emotion. Stories represent a pathway to understanding that does not necessarily rely on the left side of the brain (Pink, 2006).

Life history and other biographical and narrative approaches are now widely seen as having a great deal to offer (Anderson, 2006; Atkinson, 1995; Ellis, 2004; Frank, 2002; Gabriel, 1998; Goodson, 2001; Leibowitz, 2008; Luce-Kapler, 2004; McAdams, 2003; Richardson, 2001; Reed-Danahey, 2001). Educational biographies appear to influence teachers’ engagement with teaching and learning practices as this research methodology accounts for the material, social, and cultural influences (Leibowitz, 2008).

The fate of life history methods is closely linked to the historical emergence of sociology as a discipline (Goodson, 2001). In the early part of the twentieth century as the sociology discipline was gaining relevance within the academy, slice of life orientation toward research such as life histories, case studies, and interviews emerged most famously at the University of Chicago (Ellis, 2004). Referred to as the Chicago School, the early years included work of sociologists interested in experiences, stories, and life histories as informing and contributing to sociological discourse. One of the first such pieces of research was by Nels Anderson called *The Hobo* (1923) which explored the life of homeless men through the lens of the researcher who himself lived homeless for a period of time. Students of this first Chicago School took to living in the settings they were studying, collecting qualitative and quantitative data and had autobiographical data that emerged as a result (Deegan, 2001). However, though the researchers often immersed themselves within the setting or community they were studying, they did not place themselves within the research, preferring to remain passive to the process.
The next wave of research began to emerge after the Second World War in which researchers began to place themselves within the research more. Leon Anderson (2006) provides examples of research emerging at this time that is decidedly self-focused and reflective on the experience of the researcher. Research such as Ralph Turner’s (1947) study of naval officers is based upon his experiences in the World War II. Research on the organization of factory workers and their advocacy for increased rights was explored by Donald Roy (1959/1960) based on his experience as a worker in a machine shop. Work by Fred Davis (1959) was based upon his experience as a taxi driver and Julius Roth’s (1963) work *Timetables* was written based on his personal experiences and observations as a patient in a tuberculosis hospital (Anderson, 2006). Despite these works being grounded in the experiences of the writer, there was a tendency to “downplay or obscure the researcher as a social actor in the settings or groups under study” (Anderson, 2006, p. 375). Traditional notions of unbiased, third person observation continued to influence this emerging school of research. Even though researchers had personal connections to their research, they were not visible in the texts or self-observational in their studies (Anderson, 2006).

Though these earlier works were personal ethnographies and opened the door to future research focused on the self, the former president of Kenya’s work Facing Mt. Kenya is regarded by many to be the first published autoethnographic work (Hayano, 1979). Kenyatta’s work is criticised as being too subjective by the academic community and irresponsibly weaving narrative and scientific inquiry (Hughes et al., 2012).

Self-observation and analysis began to emerge more predominantly in research in the 1960s and 1970s beginning with Anthony Wallace’s (1965) self-observational study the maze he drove to work every day and the implications. The *Ways of the Hand*
(Sudnow, 1978) is written from a first person perspective as the author chronicles each stage of learning how to play jazz. This research “represents a virtuoso example of phenomenological research based in self-observation” (Anderson, 2006, p. 376).

In 1979, cultural anthropologist David Hayano published an essay on autoethnography that made a case for self-observation as a useful and relevant ethnographic research method (Anderson, 2006). Hayano (1979) suggested that ethnographers would increasingly move away from being outside observers, unconnected to the research toward becoming full members of the cultures they were studying.

The reason specific ethnographies and autoethnographies can be so easily identified and cited above is because the emergence of this form of research took time. Despite the rich findings and insight that they provided, critics asked whether or not it could be considered research at all, moving slowly toward qualitative methods because scientific methods were regarded as more valid (Ellis, 2004). Researchers’ feelings were not seen as valid as research, in order to be taken seriously within the academy, had to conform to traditional scientific methods and be free from perceived bias and remain objective (Ellis, 2004). Before the 1980s there were not a lot of PhDs doing qualitative research, let alone ethnographies (Ellis, 2004). The attempt to legitimize sociology as a comparable academic discipline led to the “neglect of sociology’s full range of methodology and data sources” (Goodson, 2001, p. 135). Goodson (2001) describes the use of life histories in academic research as unattractive, especially as the discipline of sociology evolved in the early part of the twentieth century. However as more researchers write life histories, ethnographies, and autoethnographies, it has become more accepted with the academic community (Goodson, 2001).

Researcher referencing and utilizing autoethnography has steadily increased over
the past 20 years in published articles, dissertations, books, and manuscripts and is becoming more widely accepted and embraced within the academy (Anderson, 2006; Ellis, 2004). Ellis and Bochner (1996) and Denzin and Lincoln (1994) are widely credited with bringing autoethnographic research to mainstream educational research (Hughes et al., 2012). Nancy Taber (2010) suggests important autoethnographic research that has emerged since the turn of this century which supports the increasing use of this methodology and validity within the academy. Ellis (2002, 2004) spearheaded this increase in autoethnographic research through the publication of her novel, *The Autoethnographic I* (Ellis, 2004), which blends creative narrative with an argument for autoethnography. She makes the connection between social movements and social stories (Ellis, 2002). Ellis and Bochner (2000) write about using dialogue in research as a way to explore a phenomenon intimately. Autoethnographic research has been published from the perspective of a mental health nurse (Foster, McAllister, & O’Brien, 2005), and used to power of autoethnographic narrative to explore the complexities of teenage pregnancy (Muncey, 2005). An autoethnographic look at acquired brain injuries through the lens of a victim of such and injury and researcher (Smith, C., 2005) furthered the promotion of autoethnographic research as the researcher put herself and her experiences into the study.

As an instructor in the Master of Education program at Brock University, I always ask students to consider their own context when constructing their culminating paper. A study that is connected to their interests and realities always makes for a better, more interesting paper. I suggest to students that I can usually tell the difference between a paper that has been written from the perspective of deep interest, particularly within personal contexts, and a paper that has been written simply to satisfy the requirements of the course. An autoethnographic approach to research takes this perspective further by
situating the researcher within the research and allowing for personal perspectives to emerge.

The exploration of people’s lives provide unique insight into phenomenon since people cannot be separated from their lives, the investigation of lives can be seen as the investigation of people themselves (Tripp, 1994). By using this methodology in studying the lives and work of educators in a full social context, the intention is to develop insights in a grounded and collaborative manner into the social construction of teaching (Goodson, 2003). It is the move from discussing what is to the consideration of what might be (Shotter, 1993).

This paper explores the life history and experiences of a new school principal in Southern Ontario and a veteran school principal in Belfast Northern Ireland. As such the political, social, cultural and historical realities influence experience and inform the universal singular; the generality that can be derived from the study of a single experience (Denzin, 1989a). Studies of the lives of educators allow the reader to see the individual in relation to the history of his or her time allowing the reader to view the intersection of life history with the history of society (Goodson, 2003).

**Autoethnography in the Academy**

Dissertations are being successfully defended using autoethnographic methodologies around the world at a steadily increasing rate. A search on the ProQuest Dissertation and Theses database (PQDT) on October 22, 2012 supports this claim by revealing a database of 1,730 successfully defended autoethnographic dissertations since 1987. This same search charts a distinct and steady increase in autoethnographic dissertations being successfully defended at universities around the world. According to this search, in 1987 there are no autoethnographic dissertations in the database. There are
two in 1992, then none again until 1994 when there are two. In 1999 there were nine autoethnographic dissertations, six in 2000, 14 in 2001 and 2002, 28 in 2003, 37 in 2004, 53 in 2005, and 88 in 2006. In 2007, the number increased to 125, more than doubled in 2008 to 267, dropped slightly to 254 in 2009, then increased again to 313 in 2010, and 340 in 2011. As of October 22, 2012, the database houses 168 (and counting).

The increase in successfully defended autoethnographic dissertations indicates the increasing acceptance and embracement of this research methodology. The topics of the autoethnographic dissertations are varied and span the social sciences. A review of the 168 autoethnographic dissertations published so far 2012 as of time of retrieval on October 22, 2012, alone reveal dissertations on poverty and social justice and equity (Mercado-Garza, 2012), the commitment and competitiveness of ultrarunning (MacNairn, 2012), and the experience of living with a son who is incarcerated (Bird, 2012). There is an autoethnographic dissertation on British modernist humour and political crisis (Ligda, 2012) and even a successfully defended dissertation at the University of California on Bellydancing in America and personal transformation (Burnham, 2012) as well as an autoethnography on the love and marriage inside the world of NFL football defended at the University of South Florida (Binns-Terrill, 2012).

This same search of PQDT further reveals successfully defended autoethnographic dissertations in education. Of the 168 autoethnographic dissertations on PQDT, 26 of them were focused on education, so approximately one out of every six autoethnographies successfully defended at universities around the world are focused on education. Topics include the transformation of low achieving schools to high performing (Williams-Griffin, 2012), the movement to direct funding in Ontario (Kelly, 2012), the work of high school guidance counselors for leadership in social justice
initiatives (Griffin, 2012), the teaching of feminist post-structuralist curriculum to 8th grade students (Segreto, 2012), and the memoir of a teacher reflecting on practice in the classroom (Cantiello, 2012).

Of the autoethnographies successfully defended so far in education in 2012, eight out of the 26 (or 30%) are focused specifically on educational leadership. Autoethnographies focused on leadership within higher education at colleges and universities (Lewis, 2012), as well as the role of race and gender on influencing school leadership (Trinh, 2012). The transition into the role of superintendent and the hiring process is explored by David Sutton (2012) at Western Carolina University as well as Steven Beagle (2012) at Lamar University-Beaumont. Leadership for online learning is the focus of an autoethnographic dissertation by Sally-Ann Lancaster (2012) at Washington State University. Perhaps most closely related to this dissertation, are the successfully defended autoethnographies focused on the transition into the role of principal and reflections on being a first year principal. Patrick Lattuca (2012) writes autoethnographically about becoming a school administrator and the socialization of his transition into the role of vice-principal. Extending this approach to the role of principal, and connected with this dissertation, as well a paper I published and presented on my first year as a principal (Browne, 2010), Michael Ray’s (2012) dissertation which was successfully defended at Mississippi State University is titled *The First-Year Principal: An Autoethnography*. This dissertation focuses on the reflections and key learning of a new principal transitioning into leadership.

The interest in autoethnographic approaches to dissertations across the social sciences continues to rise each year, as students continue to embrace this methodology as a unique way to explore phenomenon and connect the self with the social. This trend is
reflected in the dissertations focused on education and educational leadership specifically as a way to connect the personal with the social and engage educators in important discussions about educational theory and practice.

Autoethnography: Inviting Discourse

Though a search of Brock University’s digital repository on October 22, 2012 revealed no autoethnographic doctoral dissertations, Hillary Brown (2010) did successfully defend her autoethnographic dissertation *I Must Walk Through the Gate: An Ontological Necessity* at Brock University in the spring of 2010. Autoethnography is writing and research that “displays multiple layers of consciousness, connecting the personal to the cultural” (Ellis & Bochner, 2000, p. 733). It is a form of self-narrative that places the self within the social context as both method and text (Reed-Danahay, 1997). Autoethnography overlaps and in many ways is indebted to a variety of research practices such as anthropology, sociology, journalism, and psychology as well as the time-honored tradition of storytelling. Autoethnography “stimulates more discussion of working the spaces between subjectivity and objectivity, passion and intellect, and autobiography and culture” (Ellis & Bochner, 2000, p. 761).

A plethora of books and articles have been published on this method of research at an increasing rate as the value of the methodology is appreciated (Atkinson, 1995; Bruner, 2003; Clandinin & Connelly, 2000; Eakin, 2008; Ellis, 2004; Ellis & Bochner, 2000; Freeman & Brockmeier, 2001; Kincheloe, 2005; Reed-Danahay, 1997; Richardson, 2001; Richardson & St. Pierre, 2005). This methodology seeks to invite and include the researcher and the reader by creating an experience that brings together theory and practice in complicated yet meaningful ways (Jones, 2005). A central feature of autoethnography is that the researcher is highly visible within the text and the researchers
own feelings and experiences are incorporated into the story and considered vital data for understanding the social world being observed (Anderson, 2006). The meaning to the reader can be subjective and interpreted dependent on the context and experiences of the reader as life stories are created and can then be recreated in the moments of their retelling (Jones, 2005). This methodology provides the opportunity to empower, educate, and emancipate the reader (Langellier, 1999).

Autoethnographic narrative continues to influence scholarly research as the exploration of the world from a specific and limited perspective can tell, teach, and influence action (Jones, 2005). It attempts to make the world of lived experience accessible to the reader (Denzin, 1989a). The use of stories of experience of individuals can reveal personal, cultural, and political realities. Individuals exist within a personal and political context and these individual experiences are intended to influence discourse and change. It is indeed a blurred genre as it is indebted to writing and research practices in anthropology, sociology, psychology, literary criticism, journalism, and communication as well as poetry, storytellers, and musicians (Jones, 2005). By writing personal stories and experiences through an autoethnographic lens, theory and praxis is brought together in complicated, contradictory, and meaningful ways (Jones, 2005).

Stories connect what is possible with what is real. I have learned so much from speaking with colleagues, sharing ideas, and relating to stories of experiences at our schools. While it is important to go beyond the simple sharing of “war stories,” the stories themselves provide context and relationship which illuminates situations, theories, and practices. Norman Denzin’s (1989a) *Interpretive Interactionism* speaks to the interrelationship between private lives and public responses to personal troubles. Personal text can move writers, readers, subjects and objects, tellers and listeners into a
space of dialogue, debate and change (Jones, 2005). According to Pratt (1995), theory cannot be moved into action unless we can find it in the creative non-linear ways of daily life as stories give theories flesh and breath.

As a school principal I am often presented with new concepts and theories intended to influence practice by the Ministry of Education and the board of education. A multitude of new terms are introduced on a seemingly endless and on-going basis and each seem to become familiar but the reality of practical influence can remain elusive and the status quo often prevails. Schools are presented with educational ideas meant to influence practice which is often dismissed as “edu-babble” and ideas, theories, matrix and charts are passed from the Ministry to the boards to the classrooms without sufficient conversation about the meaning or applicability. Through an autoethnographic narrative educators and scholars are invited into the conversation for considerate reflection through the exploration through stories instead of presented with prescriptive theory to be implemented. The way to study a culture or phenomenon is to go there (Buzard, 2003). The exploration and sharing of my leadership journey is a way to explore the personal, cultural, and political experiences of an elementary school principal who has developed a relationship with a mentor on the other side of the Atlantic similarly committed to living and leading invitationally and invite others to consider, reflect throughout, and hopefully engage in further discourse.

Writing for the consumption of others is a very public act in which the author is inviting dialogue and debate from the audience of readers. When I first considered adding my own voice through an autoethnography, I reflected on the impact that one individual can make and wondered if the self-focus was too limiting. Throughout my doctoral work I have flirted with autoethnography and writing as research before
retreating toward third person objective research again. I struggle with my own notions of ‘validity’ and ‘authentic’ research while writing papers which fit my perception of academic rigour.

In autoethnographic writing, the eschewal of objectivity tends to be accompanied by an indication of the author’s awareness that some readers may regard the author as guilty of self-obsession (Buzard, 2003). While I struggle with the perception of an exaggerated sense of self-importance with each research paper, I concurrently recognize the unique impact and perspective a look from the inside of the culture of educational leadership can provide. There is a value to moving beyond writing “about” to writing “within.” With each paper I write and present I inevitably situate myself within the research and the feedback from scholars, journals, and conferences continues to encourage this direction. Writing about educational leadership I recognize the importance of my role as a school principal and how it informs research. Embracing writing as research and developing increasing comfort with the methodology recognizes that the world does not stand still nor conform to the logical analytical schemes of a scientist (Denzin, 1989b).

Despite this recognition of the impact an autoethnographic methodology can provide, I am cognizant of opposition to this qualitative methodology by those who prefer research to be quantitative, objective, measureable, and reproducible in a traditional scientific method approach. Social theory has always been suspicious of becoming too personal (Frank, 2002). Traditionally accepted research assumes, however, that “objective” reality can be captured, that the observer can be separated from what is observed, that observations and generalizations are free from situational and temporal constraints, that there are no causes without effects and no effects without causes, and
that inquiry is value-free (Denzin, 1989a). Despite the intentions of quantitative, objective, value-free research, the reality is that research is conducted by men and women with cultural and historical biases and observations are subject to the discretion of the observer. An autobiographical approach to research recognizes the impact of narrative and the researcher situating him or herself within the research as an active participant. It is the perspectives and lived experiences of the researcher that can invite discourse and influence others. It is important to critically consider any limits we have imposed on the concept method, so that we do not diminish its possibilities in knowledge production (Richardson & St. Pierre, 2005).

I appreciate the impact that a rich exploration of individual experiences can make and the on-going consideration and conversation it can inspire. As the work is reflected upon and voices are added to the discussion revealing the autoethnography to be more than one voice but instead a call to conversation and discovery. It is a performance that asks how our personal accounts count (Jones, 2005). However, a consideration of how an individual participant in a culture can speak on behalf of a culture to which he or she belongs is helpful to understand before approaching research autoethnographically. It is important to consider why an autoethnographer’s stories matter and if the author’s insider perspective can be accepted (Buzard, 2003). An autoethnographer must reflect on what may be taken for granted which can include their fitness for their task (Buzard, 2003). As a teacher, school principal, and scholar, I am uniquely positioned to conduct autoethnographic research with a particular focus on the influence of theory on practice and practice on theory in contemporary schools.

Denzin (1989a) argues that stories are considered and appreciated as *universal singulars*. Every person is like every other person but like no other person (Denzin,
The autoethnographer inscribes the experiences of a historical moment, universalizing these experiences in their singular effects on a particular life (Denzin, 2003a). The educational research problem is explored by understanding the experiences of an individual as the stories constitute the data of “field texts” (Clandinin & Connelly, 2000). I consider my acknowledgement of this tension as an indication of my consideration of my unique status as educational leader writing about educational leadership and the recognition that universal singularity of stories and experiences can open the culture of educational leadership and invitational theory to consideration and discussion.

Autoethnographic work values emotions as being important to the understanding of self, power, and culture allowing focus on emotional experiences as it connects to and separates from other ways of being, knowing, and acting in the world (Bochner, 2001; Ellis, 1997; Jago, 2002; Spry, 2001). Stories help us to create, interpret, and change our social, cultural, political, and personal lives (Jones, 2005). Perspectives and experiences must be grasped, interpreted and understood if solid, effective, applied programs are to be created (Denzin, 1989a).

Autoethnographies provide an opportunity to educate, empower and emancipate (Langellier, 1999). Stories are not simply the reflections of an individual voice but instead a call to conversation as life stories are created and recreated in the moments of their telling. An author invites an audience into dialogue by writing, speaking, and performing the word on the page and in the world (Jones, 2005). The performance of writing and the interaction with the reader as audience turns the personal story into narratives in interpretive, qualitative, critical, and narrative inquiry making art matter and generating action in the world (Jones, 2005). The autoethnography strives to engage
readers emotionally, intellectually, socially, culturally, and politically. By affirming the authenticity of the personal narrative, analysis can initiate a significant political intervention (Frank, 2002).

It is this embrace of an autoethnographic narrative as the foundational methodology which provides a personal connection to the interview and case study of Billy Tate’s leadership and mentorship. The personal and political are inextricably linked using this methodology which provides an authentic exploration of the realities of school leadership in contemporary schools.

**Interview: Connecting Personally and Politically**

The traditional or at least seemingly commonly held perception of the interview as a research methodology is that of the neutral interviewer maintaining an objective distance from the interviewee and analyzing the data later as free from bias as possible. The notion of neutrality is commonly associated with academic interviews as a data gathering tool which can be linked to the interview as an extension of the scientific method of inquiry which strives for third person objectivity. However as a research methodology embedded within an autoethnography, the connection between myself as the interviewer and Billy Tate, the principal of East Belfast Primary School, as the interviewee is inevitable and overt. The interview as a means of generating and gathering objective data is being joined by a growing amount of scholarly literature that not only supports the rejection of neutrality but embraces an empathetic approach (Atkinson & Silverman, 1997; Fontana, 2002; Holstein & Gubrium, 1995; Scheurich, 1995). The long-accepted positivist interpretation of the interviewing process “vastly underestimates the complexities, uniqueness, and indeterminateness of each one-to-one
human interaction” (Schuerich, 1995, p. 241). The interviewer is an active participant in the process of a mutually created story (Holstein & Gubrium, 1995).

This approach to interviewing recognizes the contribution not only of the interviewee but also of the interviewer as an advocate and partner in the study, hoping to use the results to advocate social policies (Fontana & Frey, 2005). By practicing this form of interviewing we advocate that by knowing others we come to know ourselves (Fontana & Frey, 2005) which is evident in the way this methodology recognizes the impact of the interview on the interviewer via autoethnographic research. While this approach distances itself from the clinical scientific method style of interview, it advocates a flexible approach which encourages the researcher to continue to question and explore further possibilities not considered at the outset of the interview. When I met with Billy, I did not have set questions to ask. Instead, I allowed the conversation to take a natural path and in doing so came to understand more than I had anticipated about his leadership in East Belfast. I did not suppose I knew anything about him or his leadership when we met, though I had impressions based on our conversations, and by doing so, the interview revealed more than I could have anticipated. This interview approach is described as empathetic interviewing. The empathetic approach is not merely the representation of friendship between the interviewer and interviewee but is a method of morality because it attempts to restore the sacredness of human interaction before addressing any theoretical or methodological concerns (Fontana, 2003).

In many ways we live in an interview society in which the methodology has pervaded popular cultural to the point where it can be argued that everyone is familiar with it in one form or another (Atkinson & Silverman, 1997). From Larry King to Oprah Winfrey, we have become accustomed to the dramatization of the interview as a way to
educate and share stories and experiences for entertainment and education. Interviews take the form of political polls, questionnaires, and determine eligibility and appropriateness of jobs as a widely accepted data gathering tool. In many ways the interview has become a means of storytelling in which life accounts and opinions are shared for public consumption (Gubrium & Holstein, 1998).

Interviews have been around for centuries. The story of the birth of Jesus in Bethlehem reveals the use of interview in the form of a population census conducted by the Romans which required Mary and Joseph to travel from Nazareth to Bethlehem, the ancestral home of Joseph, to participate in the census. Opinion polls have long dominated politics, popular culture, and advertising and marketing pioneered by George Gallup. Academically, the Chicago School members employed methods which relied on observation, personal documents and informal interviews in their studies (Fontana & Frey, 2005).

Quantitative interviewing utilizes a structured approach in which the interviewer asks a pre-set series of questions and endeavors to maintain a neutral stance at all times. The interviewer does not get involved with the interviewee, deviate from the questions, interrupt the interviewee, suggest an answer, interpret the meaning of an answer, or improvise in any way (Fontana & Frey, 2005). Qualitative interviewing which embraces an ethnographic approach to the methodology is the unstructured interview which employs open-ended questions and can take on a conversational tone. This is the approach I use for my interview with Billy Tate in Belfast.

The structured interview aims to capture precise data whereas the unstructured interview attempts to understand the complex behavior of members of society without imposing anything that may limit the inquiry in any way. The intention of the
unstructured interview is to understand the complexities of the phenomenon rather than explain them.

Fontana and Frey (2005) suggest an approach to unstructured interviewing that includes: assessing the setting, understanding the language and culture of the respondents, deciding how to present oneself as the interviewer, gaining trust, establishing rapport, and collecting empirical material. As I conducted the interview with Billy in Belfast I was keenly aware of this approach. In terms of assessing the setting or getting access to the interviewer, I was introduced to Billy and developed a relationship with him over email for three years that evolved into a mentor/mentee situation. While some interviewers have to rely on interpreters from a language or social perspective which can add an additional layer of complexity to the interview, mine and my wife’s Irish heritage equipped me with the cultural and social understanding and sensitivity to the cultural and political situation in Belfast as well as the common understandings of the realities in which Billy lead his school and was speaking to me. I presented myself honestly as a fellow school principal early in my career as an educational leader and conducted the interview with that common understanding. Trust, respect, and rapport had been established over the years of email correspondence between us. The collection of empirical material was accomplished by recording the interview and reproducing it in its entirety in text form which was shared, member checked and approved for accuracy before analyzing and interpreting the data.

Unstructured interview techniques are presented and discussed at length by scholars such as Denzin (1989), Lofland (1971), and Lofland and Lofland (1984), but the essence is that the researcher is involved in informal conversation with the interviewee and the tone is more of a friendly collegial exchange. While the conversation tends to
flow naturally in an unstructured interview, the researcher moves toward specific questions intended to gain a deeper understanding of the phenomenon being discussed. While conducting the interview with Billy we knew about one another but focused the conversation on his experiences in order to better understand how an inviting approach to leadership influenced his practice. Though there were times when he asked me questions about my perspective or approach to leadership, I intentionally steered the conversation back to his experiences and reflections. However, no attempt is made to isolate myself from the interview as it is two colleagues, one at the beginning of his career (me), the other at the end of his career (Billy) mutually creating the story for the reader to better understand both people involved. Gubrium and Holstein (2002) consider the interview a mutually accomplished story that is reached through the collaboration between the researcher and respondent.

**Interviewing In Belfast**

Belfast is a city with a rich history of culture and conflict as divisions continue to exist culturally, politically, and socially between Catholics and Protestants, many of whom live isolated existences in close proximity to one another. Billy Tate’s invitational approach to school leadership recognizes and celebrates differences in an attempt to reconcile and foster peace and understanding between communities. As an interviewer it was important to understand and embrace the personal as well as the political and as a researcher interested in change and the influence of theory on practice. To ignore the outside influencing factors of life in Northern Ireland and focus solely on the interview and my experiences learning from it would miss the context in which Billy was living and leading. Observational research allows the bigger picture of political, social, and
historical influences to be considered in relation to Billy’s leadership and the creation of an inviting school in East Belfast.

**Observational Research**

Observational research is often seen as “traditional” in its connection to fieldwork, evoking both real researchers, such as Jane Goodall, and the fictional, such as Indiana Jones, as being in and amongst those being researched and observing from a distance. It involves immersion in a situation or culture in order to observe and report. It has been called the “fundamental base of all research methods” (Adler & Adler, 1994, p. 389) and a “mainstay of the ethnographic enterprise” (Werner & Schoepfle, 1987, p. 257) as ethnographic research is based on researchers observing from within in order to understand cultural, social, and political phenomenon.

A researcher conducting observational research should be doing so within the naturalistic setting but should not in any way interfere with the people or activities under observation. While immersed within the culture the observer should maintain objectivity otherwise the critique against their work would be that they have “gone native” and thus call their research into question (Pelto & Pelto, 1978, p. 69). While research like this may refer to former research projects which may have included contact with cultures or persons who had limited contact with the outside world, most cultures today are part of the larger society which is connected globally by transportation and communication. As such, ethnographers can no longer claim to be the only ones to possess knowledge of a culture or community because they are in a position to have their work read and analyzed and potentially contested by those with knowledge of or those within the community they are writing about (Bell & Jankowiak, 1992). While images of the ethnographer reaching remote peoples may be a thing of the past, it still carries both a romantic connotation as
well as colonial implications which inform observational research today. Subsequently, the term *subject* is no longer used in favour of the term *dialogue* indicating the relationship between the researcher and those within the culture being described (Angrossino, 2005). Dialogue in the case of observational research refers more to the collaborative nature of the process than a conversation between participants or the researcher. The person being interviewed is no longer the subject, but instead is the collaborative participant in the dialogue and the research.

There are three main ways in which social scientists have conducted observational research: participant observation grounded in the establishment of rapport with the community; reactive observation associated with controlled settings in which those being observed know they are; and unobtrusive observation conducted with those who do not know they are being studied (Angrossino, 2005). The observations can then be reported in broad strokes using descriptive observation which produces a large amount of data, some of which may be useful, or more focused observation that specifically looks at the data that is pertinent to the issue at hand, or even more selective observation which looks at specifics of the issue at hand and reports on that.

The observational approach I take with this paper combines the three observational research methods. I joined Billy in Belfast as a guest and connected with him after a relationship and rapport had been established. He understood he was being observed and consented verbally and in writing to his participation in this project. My visit to the school was also an acceptance of an invitation which allowed me to establish rapport with the staff on site quickly. An opening lunch was provided for me allowing me to connect with many staff members from the outset. As a result, when I visited classrooms I was not a stranger and was welcomed into the classrooms. All staff was
aware that I was there to observe and witness and in that sense there is an element of reactive observation as those being studied understood that they were being observed. Unobtrusive observation also plays a role in my observational research as the understanding of the culture and politics of Northern Ireland, Belfast, and the East Belfast Estate specifically was important to the understanding of the context in which Billy was principal of East Belfast and the staff worked. Those outside of the school did not know they were being observed by me as I took into account the signs, posters, flags, murals, and physical makeup of the housing estate and the city in order to provide vital context to Billy’s leadership. Just as the overall methodology is an amalgamation of research methods in order to best explore the research questions, my observational research was also multi-faceted in response to the unique situation at East Belfast Primary School and in Belfast, Northern Ireland more broadly.

The role of the observer can be a difficult one because of the notion of always being an outsider to the community no matter how involved one becomes. The difference between my experience as a Canadian with Irish heritage coming in to visit East Belfast Primary school and the housing estate is very different than the experience of those living within the estate and attending the school. As an observational researcher I have become an advocate for East Belfast Primary School’s staff, students, and community and specifically for the work of Billy Tate. In this sense, I provide a rounded account of the life and leadership of Billy Tate with the focus on him and his changing relationships and reflections on practice rather than a larger group such as educators in Northern Ireland specifically creating “ethnography of the particular,” (Angrossino, 2005, p. 741) which has universal applicability.
The Influence of Cultural Identity on the Methodology

This amalgamated methodology is reported in narrative form as I share the autoethnographic journey from a young principal through the development of the mentorship relationship with Billy Tate to my journey to Belfast, visit to East Belfast Primary, and interview with Billy in his bedroom. The use of narrative to share the stories and experiences is meant to engage the readers and situate them within the context of each story and situation. Sharing and reflecting on experiences is not, however, something I have committed to undertaking for the sake of this project. It is part of me. Being able to tell a tale through narrative is a cultural necessity in an Irish family such as mine. As Carol Ellis (2004) says, you don’t really choose autoethnography, it chooses you.

Growing up in a family of story tellers, I appreciate the way in which narratives connect people and deliver the essence of a message. However, “Ireland is not conspicuously burdened with a history of internationally famous educationalists,” (Limond, 2003, p. 23). Stories can explicitly reveal intentions or provide enough to simply provoke thought and discourse. As a product of an Irish family, I had to learn how to weave a yarn in order to keep up at family functions.

Much of the Irish gift for storytelling can be directly related to the Irish language. The language itself provides so many lyrical and beautiful ways to describe the mundane. The English language has a way of getting to the point whereas the Irish language, and the way in which it is passed down from generation to generation through stories, is comfortable meandering and poetically situating the listener or reader. Where Marshall McLuhan argues that the medium is the message, the Irish might similarly argue that the story and its telling is the message. The story is the point and the listener or reader experiences it.
The story of Fionn MacCumaill (Finn MacCool), an ancient Irish story as told by Irish author Mici Sean Neill (1956), provides an example when translated directly from Irish. Where the English language might start the story by saying “Fionn MacCumaill was hunting with his men in the woods when he came upon a doe. They chased after the doe but it escaped”, the Irish starts with “La de na laetib agu uair de na nuaireanna a rad Fionn Mac Cumail agus a curd fear ag seilg fir euro sleibte tir tsliab agu d’imig si ortu ina n-ainneoin agu a’fag si folac sleeve ortu.” Translated from Irish into English the story starts “On a day of days and in an hour of hours when Fionn MacCumuaill and his men where hunting through some of the mountains in Donegal, they followed a doe one day far into the mountain and she escaped from them, despite them, and left them the emptiness of the mountain.” The next line if told in English might simply read “They sat down, tired after the journey as the mist rolled in around them.” In Irish the next line in the story continues “Suig said sios ar maolenoe beag glas agus iao tuirseac moiaro an turais. Tit cnap ceo anuas ina mullac agus ni tioefad lest a ran ac ceo draiocta a bi ann” which translated from Irish into English says “They sat down on a bare little green hill and them tired from the journey. A ball of mist fell on top of them and you couldn’t say it wasn’t a magic mist.”

The tradition of storytelling is part of the very fabric of Irish culture as a small island that regularly produces authors, playwrights, poets, and storytellers. This rich tradition can largely be attributed to the poetry and beauty of the Irish language and the lyrical way in which stories are shared and passed along. Stories should be beautiful, moving, and poetic. They are not merely ways to disseminate information but instead are meant to live and breathe through rich description and poetic language. Storytelling for me is the most natural way to explore a phenomenon. It provides both a research
methodology as well as a means of reporting findings in an accessible and thoughtful way which Daniel Pink (2006) would suggest is the way to creatively explore a phenomenon. As an author, researcher and academic from an Irish family, this amalgamated methodology not only suits the subject matter as I not only explore invitational leadership theory in Belfast Northern Ireland, but also my cultural identity.

Well-considered narratives can influence theory and practice and support the dissemination of ideas and support for scholars and practitioners. These experiences shared through narratives are both personal in the experiences of the individual and social in the individual interaction with others (Clandinin & Connelly, 2000). Through the exploration of experiences and stories connect the autobiographical and personal to the cultural and social (Ellis, 2004). Stories are not simply entertainment but can be a powerful form in which we can make sense of the world (Egan, 1988). However, stories are not just a way in which we make sense of the world but also a means in which social change is enacted (Roney, 1994).

A study by Clark and Medina (2000) describes how reading and writing narratives in pre-service teaching programs contributes to an increased understanding of pedagogy, literacy, and multiculturalism. Specifically they found that narratives support teachers’ epistemological development, critical and multicultural understandings of literacy, connections between personal narratives and that of others, and personal connections to theory (Clark & Medina, 2000). As an effective approach for teacher candidates, the use of this methodology in this study has the potential to make an even greater impact on practice as its focus on educational leadership will most likely appeal to established teachers and leaders. Collaboration is the key to this process and it is this collaboration
that holds the most potential for the dual roles of narrative inquiry as a pedagogical strategy (Coulter, Michael, & Poyner 2007).

**Creative Analytic and the Interpretive Process**

As the research method does not fit into traditional scientific inquiry, it is important to understand the structure of autoethnography as a research method and the steps to consider for the interpretive process. While detractors of autoethnography as a research method might dismiss the approach as simply the telling of stories, the methodology is much more. It is the interpretive analysis of the narrative, the connection to social, political, and personal and the potential to make an impact on practice. The language of research is often cited as a barrier to the dissemination of research to practitioners while a shift in presentation of theory from academic language to that of conversation is suggested as an example of lessening the distance between scholars and practitioners (Carson, 1986). Richardson and St. Pierre (2005) claim that qualitative writing has been, for the most part, boring because of its adherence to formal structures and academic formality meant to appease the academy. If researchers want their work to be taken seriously, Richardson and St. Pierre suggest that function has trumped form as storytelling has taken a backseat to academic rigor. The autoethnographic author does not use words like data or abduction or objectivity because of their obvious connection with science, objectivism and knowledge produced for disciplines, not for everyday people (Denzin, 2003a).

Autoethnography as a research method should be evaluated by considering the substantive contribution to social life; the aesthetic merit of the work in its creativity and artistic worth; reflexivity, as the author is both a producer and a product producing adequate self-awareness for the reader to make judgments; and impact in the
consideration of the work as a clear expression of cultural, social, individual, and community and its impact on the reader emotionally and intellectually (Jones, 2005; Richardsdon & St. Pierre, 2005). It is the challenge of telling and showing stories that are not only necessary but also full of possibilities as we recognize the power of in-between as the interaction of message and aesthetics, process, product and the individual and society (Jones, 2005).

Biographical narrative must be interpreted and Denzin (1989a) suggests strategies. First, the subject must be located within the social group being studied. Second, a problematic act or event must be identified and captured within the personal experience story. Third, the basic features of the narrative must be interpreted. Fourth, these interpretations must be related back to the life in question (Denzin, 1989a). In this paper both Billy and I are practicing school principals at different stages of our educational career, the problem is the immense responsibility and challenges inherent within the position and the potential impact of theory on practice to support and inform practice. These experiences are captured within the autoethnography and interview, case study and observations of Billy Tate in Belfast. The stories are interpreted for relevance to educational leadership and related back to my leadership and the reflections of Billy with a universal application for educational leadership in that they are unique and specific but can be related and applied to educational leadership as universal singulars (Denzin, 1989a).

**Evocative Versus Analytic Autoethnography**

As autoethnography continues to emerge as a form of research within the academy that is able to connect the self with the social (Anderson, 2006; Denzin, 2006;
Ellis, 2004; Taber, 2010), a debate amongst autoethnographers has contributed to the consideration of evocative versus analytic autoethnography.

Evocative autoethnography, as exemplified by the work of Ellis and Bochner (2000), Ellis (2004), and Richardson (2001), argues for the importance of storytelling and human experiences as a way to evoke feelings and emotions within the reader rather than overtly making personal or social connections. Ellis and Bochner (2000) explain how evocative autoethnography is connected to fiction or a novel by fracturing the boundaries between social science and literature. Ellis and Bochner (2000) call for narrative research that “refuses to abstract and explain” (p. 44). The goal of evocative autoethnographers is to provide compelling descriptions and narratives which create emotional resonance with the reader (Anderson, 2006).

Evocative autoethnography appears to have received the most attention and as such, generate the most discussion about the appropriateness of this form of research within the academy (Anderson, 2006). Anderson (2006) cites published evocative autoethnographies in qualitative research journals such as the Journal of Contemporary Ethnography, Symbolic Interaction, and Qualitative Sociology as evidence of the increased acceptance of an evocative approach to autoethnography within the academy. *The Sage Handbook of Qualitative Research* edited by Denzin and Lincoln (2000), further puts these forms of research out to wider audience through the inclusion of chapters on narrative research, case studies, and performance ethnographies.

Autoethnographers who write evocatively attempt to change the world by writing from the heart (Pelias, 2004). Analytic autoethnographers, who Denzin (2006) describes as advocates of a Third Chicago School, want none of this.
Analytic autoethnographers such as Anderson (2006) make the case the evocative autoethnographies do not go far enough in connecting the personal to society and as such, do nothing to further the acceptance of autoethnography as important and valid research within the academy. Contrary to an evocative perspective, autoethnographers should expect to be involved in the construction of meaning and values in the social world being investigated (Anderson, 2006). According to Anderson, the purpose of analytic autoethnography is not to simply document personal experiences or evoke emotion, but instead to make connections and gain a broader insight into social phenomenon (Anderson, 2006). Denzin (2006) writes that Anderson (2006), while impressed by the success within the literature of evocative autoethnographies, is concerned that this methodology will be dismissed or distanced from more traditionally accepted qualitative research without some connection to a more traditional scientific approach. In some ways, Anderson’s (2006) assertions attempt to connect analytic autoethnography with earlier work from the Chicago School as a way to legitimize autoethnographic research and gain wider acceptance within academia.

Instead of leaving inferences, conclusions, and links to broader social themes up to the interpretation of individual readers, analytic autoethnographic research suggests the responsibility for this lies with the author and researcher. Though Muncey (as cited in Taber, 2010) writes about her life as a teenage mother, her goal is to make a wider connection to critique society’s view of teenage mothers (Taber, 2010). At the heart of autoethnography is the connection between the self and the social, and the assertion of autoethnographic researchers such as Anderson (2006) and Taber (2010) is that this form of research should go beyond the exploration of the self in order to gain better insight into the social.
Anderson (2006) cites the work *The Body Silent* by cultural anthropologist Robert Murphy (1987) as an autoethnographic approach that moves beyond simply looking inward toward a connection with larger societal implications. Autoethnography can be described as looking at oneself in order to see others and a way to connect the self with society. Murphy’s (1987) work about his life of illness with spinal disease uses his own experiences to connect to the larger societal issue of living with illness and human disability. Murphy demonstrates that deep personal self-observant ethnography “can rise above idiographic particularity to address broader theoretical issues” (Anderson, 2006, p. 379).

In this dissertation, I take a reflexive analytic approach by going beyond the evocation of emotions to making connections to the broader implications of educational leadership. Denzin’s (1989) concept of autoethnographic research as a universal singular is applicable as I seek to understand my own leadership journey and that of Billy Tate and how that understanding can contribute to the broader conversation on educational leadership. As a researcher, I am aware of the reciprocal influence between the ethnographer and their settings and informants (Anderson, 2006). I am both involved as a school principal and mentee with Billy, and detached as I consider how those connections contribute to the discussion on educational leadership. While ethnographers recognize the importance of understanding the relationships between researchers and data, not only do they form the process, but they are also formed by the process as cultural meanings are understood in relation to the process (Anderson, 2006). As I engaged in the research with Billy, I was not only learning about invitational leadership, what it looks like in practice in his context, but also how this emerging story was influencing my own leadership and commitment to living and leading invationally. Anderson (2006) suggests that this
mutually informative process is the most appealing feature of autoethnographic work as the researcher is visible, active, and reflexively involved in the text. In this way, autoethnographers “form part of the representational process in which they are engaging and are part of the story they are telling” (Atkinson, Coffey, & Delamont, 2003, p. 62). While evocative autoethnographers may strive to simply capture what is happening and provide an inside view of a phenomenon, they would refuse to generalize particulars and make the connection with society. Like other qualitative researchers, autoethnographers must describe the phenomenon in sufficient detail for the reader to determine whether the findings are generalizable to the broader context (Hughes et al., 2012). This is not the approach of this dissertation. By exploring my story, Billy’s story, and how they influence school communities, the implications on the influence on school leadership in general can be made. The universal singularity of the stories in this dissertation, provide evidence of the applicability and influence of inviting theory in practice while suggesting wider embracement by the educational leadership community.

**Aesthetics**

The purpose of educational research is to improve the experiences of students, teachers, and educational leaders as researchers attempt to influence practice. The way in which research can have an impact and make a contribution to academic literature as well as educational practice must be considered when conducting research. This methodology invites the reader into my world as a principal in Southern Ontario as well as Billy Tate’s world as a principal in Belfast Northern Ireland where he or she may recognize themselves or situations and relate accordingly thus drawing the reader into community. There is beauty and intelligence in everyday experiences which can be presented with aesthetic value. It is with this in mind that this amalgamated methodology allows for the
exploration of the stories, themes and interpretations in narrative form. Written as the journey of a new school leader struggling with the complexities of the role, this paper considers the intricacies of daily realities concurrently with the political, social, and historical complexities of school leadership in Northern Ireland and how the intentional implementation of inviting theory influences leadership, school culture, community and student learning. Life requires constant consideration of the everyday.

The potential to influence practice rests to a certain degree on the accessibility of the research. As autoethnography is an ethnography focused on the self, it is important to consider how the “success” of the writing is evaluated. Upon completion, is the work a success, deficient, or an utter failure? Done badly, autoethnography can be justly criticized as embodying the worst excesses of post-modernism, as the author creates self-indulgent, un-generalizable, impenetrably individualized narrative (Holt, 2003). As I write I am conscious of the dangers of “decay into narcissism” (Keith, 1992, p. 558). At its best, however, autoethnography shares voices that might not otherwise be heard and presents insights that may have been too subtle to elicit (Cunningham & Jones, 2005). Done well, it can be “a provocative weave of story and theory” (Spry, 2001, p. 713). The goal of the story does not lie in the accuracy of the story, but in the meaning (Gabriel, 1998).

In Dewey’s (1938a) *Art as Experience*, the integrity of art is reflected in everyday experiences, as art should be part of everyone’s life. We learn about the significance of the aesthetic in our lives by the intelligent search amongst ordinary experiences (Kupfer, 1983). The sharing of experiences through writing which is deliberate and considerate of aesthetics can increase connections and community. Aesthetic experience encourages participation in community (Kupfer, 1983). The autoethnographic approach to research
looks at the aesthetics of the whole experience. Philosophy can make a special contribution to everyday life by taking up personal, social, and political questions aesthetically (Kupfer, 1983).

A methodology such as this recognizes that the exploration of questions can lead to more questions and potentially future inquiry. This narrative autoethnographic approach to school leadership strives to take the reader beyond the ordinary perception of things. It forces us deeper into ourselves in an attempt to gain a fuller view of the world (Kupfer, 1983). This work will be defensible as a success when it invites deeper discussion and understanding of educational leadership from an inviting perspective through the exploration of the everyday experiences of educational leaders living intentionally within unique social, political, and cultural contexts.

**Ethical Considerations**

Research requires careful evaluation of the way in which it is conducted to ensure congruence with standards of ethical practice. Conducting respectful research sensitive to individual participants and research contexts is the responsibility of the researcher (Tilley, 1998). While considering the contribution to academic literature, the impact on individuals and community must be contemplated. Researchers intimately involved and intrinsically motivated must appreciate the fact that they are guests within private worlds and as such need to be considerate of any potential risk of embarrassment, loss of standing, employment, or self-esteem when considering how and what to report (Tilley, 1998). Researchers have a moral obligation to be protective of the subjects involved in research as reporting should be discussed before research begins.

Ethical consideration must be given to any person or persons to who harm could come from being identified. The researcher must always attempt to do no harm with
research which may include changing the names and persons within the research to protect their identity. While the school name and location in Southern Ontario and Belfast Northern Ireland is changed within this paper in congruence with the ethical permission granted from the schools boards, the name of Billy Tate appears throughout the paper in reference his invitational leadership. Though the original ethical approval for conducting this research was granted contingent on changing all names and locations, this approval was formally amended through the completion of a request for modification approval. The reporting of the stories and conversations reveal a thoughtful, caring, optimistic, and courageous school leader who dedicated his life to working for change and peace in Northern Ireland from an inviting perspective. This paper is a celebration of his work and recognition of an educational life. He is quoted within directly and his published work is similarly referenced. Billy Tate’s leadership is revealed to be a model of invitational education and as such is identified in order to give appropriate credit to a truly remarkable educator.

The commitment all academic researchers make is to do no harm when considering participants wellbeing and reputation. The research conducted with Billy Tate reveals an inviting leader committed to invitational theory and influencing his students and community in a positive way. When considering sharing his stories anonymously it became clear that doing so would diminish the very real accomplishments of Billy and his staff and further degrade the assertion of this paper that inviting theory influences contemporary leadership. Revealing Billy’s name illuminates a vibrant community of educators who continue to commit to living invitationally. Not only will the identification of Billy do no harm, it will celebrate accomplishments and hopefully further influence practice. Billy Tate read and consented to the transcripts as reported
herein as did others after their interviews and my visit to East Belfast Primary. Since Billy passed away in June of 2010, permission to identify him directly within this study was formally granted by his wife as next of kin and was submitted as part of the request for modification. The perspective of this dissertation is that Billy Tate’s invitational leadership is a story that needs to be told as is revealed in this paper in the next chapter.

**Ethical Approval**

Permission to study my own school and leadership through the autoethnography was granted through the research ethics committee of the school board. Permission to conduct research at East Belfast Primary School in Belfast was granted by Billy Tate as the principal of the school, and individual participants through their signed consent. With the permission from my school board and East Belfast, permission to conduct research was granted by Brock University’s Research Ethic’s Board under file 09-194. A request for approval modification was submitted in March of 2011 to request permission to reveal the identity of Billy Tate with the expressed written consent of Billy’s wife as his next of kin. Permission to proceed with this study under these conditions was formally granted by the Research Ethics Board of Brock University in March 2011 under the same file number.

**Participant Permission**

Participants participated willingly and openly in the research process. Informed consent was provided and signed by participants indicating their willingness to contribute their perspectives to the research. Transcripts were shared with the participants and they were provided the opportunity to opt out entirely at any time or to have any portion of the transcript omitted from use. The wishes of all participants were respected fully and this research project was conducted to the highest ethical standards. The consent forms which
were signed by participants are included as appendixes to this paper. Further consent was granted post-mortem by the widow of Billy Tate to reveal his identity through the stories he shared with me during my research trip to Belfast in March of 2010.

**Preventing Identification**

As a school principal who is concurrently engaged in academic research I recognize the unique position I am in to conduct research within a contemporary school. I have access to the dynamics of the school, students, staff and communities. It is this unique access which provides a rich understanding of school leadership as a lived experience through the eyes of a practicing principal intentionally committed to invitational theory. I also have a unique perspective on other schools and recognize how the portrayal of another school can have implications to the reputation of the school, leadership, staff, students and community. I appreciate the unique responsibility I have to maintain confidentiality of all individuals, the school, school board, and community in stories and situations. Identifying names of individuals and locations have been changed and genders as appropriate. As a medical doctor commits to doing no harm when they take the Hippocratic oath I have similarly committed to conducting research in a way that will do no harm to any individual, school, board, or community through this amalgamated methodology. The consideration of the identification of Billy Tate was not taken lightly and only requested after fully satisfied personally and through the Research Ethics Board that this identification would pose no concern or harm to Billy’s family, reputation, or legacy.

**Accountability and Slippage**

Autoethnography requires the author to situate him or herself within the research as an active participant, writer, and character within narrative. The issue of slippage in autoethnographic work refers to the potential tendency of the writer to omit information,
stories, or situations which could portray the author in a negative light. When writing autoethnographically we are forced to hold a “critical mirror to our lives” (Medford, 2006, p. 859) and sometimes looking into that mirror may not be flattering. What happens when an author purposely omits a relevant story because it may portray the author unfavourably? The possibility of a form of revisionist history or the possibility that the author revises the experience is something that the writer needs to consider when writing. As Medford (2006) states, “We must hold ourselves to a high ethical standard so that we are fully accountable” (p. 862). In this sense both personally and relationally the autoethnographic author must be prepared for the potential impact on personal identity and relationships. I am cognizant that my writing is accessible to all but commit to holding my work to the high ethical standard so that I am responsible and fully accountable for my writing. Being cognizant of the potential to omit or intentionally let relevant stories slip from my writing remains at the forefront of my writing as I endeavor to share the experiences of educational leadership in Southern Ontario and Belfast Northern Ireland. Having written this dissertation, read, re-read, and reflected upon each aspect, I do not anticipate anyone will be hurt or embarrassed in any way by this study in Belfast or Southern Ontario.

**Memory and Time**

Researching through writing, narrative inquiry, and autoethnographic research can raise concern regarding potential validity of the research due to the malleability of memory and the passage of time. As a researcher, how can I ensure my memory of any events or situations are as they occurred? There will always be a lapse in time between an experience and the writing of the experience therefore how accurate is the reflection over time and does the validity of the story diminish with the passing of time between the
experience and writing? This research issue has been addressed in several papers and books (Brockmeier, 2001; Clandinin & Connelly, 2000; Denzin, 2003; Luce-Kapler, 2004; McAdams, 2003) which suggest, much like Denzin (1989a) does in his analysis of the assumptions of positivism and detached research that objective, value-free observation is not as important as the generalities of the lived experience.

The goal of the autoethnographer is to “extract meaning from experience rather than to depict experience exactly how it was lived” (Bochner, 2000, p. 270). The autoethographer is interested in the broad strokes of lived experience and the application to social, political and cultural issues rather than seeking absolutes. Reality is subjective to the observer as the same scenario can be interpreted differently from multiple perspectives as observers and participants bring different histories, experiences, and priorities to any situation. The positive establishment of an agreed upon reality presents a significant challenge as perspectives, history, and situations dictate the processing of an experience uniquely to individuals. It is in the exploration of these individual experiences that can enlighten and inform as the universal singular (Denzin, 1989a). Memory and facts are not as important as is the ability of the researcher to distill the experience into a story that will encourage discussion and contribute to the conversation on educational leadership. Using writing as research, this autoethnography explores the tensions, challenges and complexities, of educational leadership from the perspective of two elementary school principals. As a school principal sometimes overwhelmed by the reality of the role, I committed to living a theory of practice and invited others to do the same. Billy Tate similarly committed to the creation of an inviting school in a radically different social, cultural and political situation in East Belfast Northern Ireland. The exploration of these two lived experiences has the potential to make a significant
contribution to educational leadership literature and discussion and impact leaders and potential leaders in contemporary schools.

**Data Collection**

I wrote a journal of my daily reflections on leadership, experiences and situations as principal to assist with memory and autoethnographic writing on both my leadership and on my visit to Belfast, Northern Ireland from my return in mid-March 2010 until the end of June 2010. As I reflected on my time in Belfast and connection with Billy, I noted how the experience and connection with Billy had influenced my approach to leadership from big decisions to daily interactions as the principal at St. Stephen’s Elementary.

Thoughts and situations are noted and described at the end of chapter 4 as well as specific connections to what I learned from Billy Tate throughout our mentorship relationship and during my experience in Northern Ireland. In each journal entry I note how my perspective was influenced by Billy Tate and what he taught me. These reflections are not only meant to illustrate the real connections and impact Billy Tate had on my leadership but also in consideration of memory and potential slippage. By writing faithfully each day for the rest of the academic year, I was able to capture reflections on my experience and connection with Billy Tate and my visit to East Belfast Primary school.

Email correspondences between Billy Tate and me have been saved for this study. The interview with Billy Tate and the acting head and chair of the Board of Governors at East Belfast Primary as well any interviews with staff at the school were recorded using a mini-disc recorder. Interviews were transcribed and shared with all participants for accuracy, accountability and fact checking. All transcripts were member checked for accuracy. Any requests for deletion of information in order to reduce the possibility of
identification were honoured and all typed transcripts and audio recordings remain saved on file to ensure accuracy in congruence with ethical research.

The triangulation of the data is used to ensure accuracy and credibility. The triangulation of data includes field notes and journal entries, the member-checked interviews on recorded on disc and typed out as transcripts, and peer debriefing.

**Methodology Conclusion**

Educational leadership continues to be considered by scholars who recognize the impact that school-based leadership of principals and vice-principals plays on student learning. The role of principal is such a vital one, yet the responsibilities of educational leadership can seem overwhelming as principals learn from experiences and those of colleagues and mentors. The value of mentorship is supported by the Ministry of Education and school boards across the province but it is the exploration of these experiences to the formation of a knowledge base that informs this amalgamated methodology.

I am culturally and personally predisposed to exploring phenomenon through reflections on experiences and stories. I value the complexities of the day to day and how the understanding the experiences of a new and experienced school leader can contribute to the conversation about supporting educational leaders. Using an autoethnographic approach, this paper utilizes interviews and observational research to explore the impact of invitational theory on the practice of a new school leader and a school leader at the end of his career and how the establishment of a mentor/mentee relationship can contribute to leadership confidence and practice. The personal, social, cultural, historical, and political experiences provide a unique insight into school leadership and contribute to the universal applicability to educational leadership. This autoethnographic amalgamated
methodology provides exclusive access to contemporary elementary schools and perspective on the reality of school leadership within.

This paper reflects on experiences which invites readers into the discourse about the role of the principal in the life of a school and the impact on students in two very unique educational situations. This amalgamated methodology publicly reveals my thoughts, emotions, decisions, struggles, and epiphanies as well as those of Billy Tate in Belfast which have contributed to my practice as a school leader.

The next chapter is the story of my approach to living and leading invitationally at St. Stephen’s elementary school in Southern Ontario. My transition into the school and embrace of an inviting approach to leadership is revealed. My introduction to Billy Tate and the beginning of our mentor/mentee relationship across the Atlantic is then presented, followed by my trip to Northern Ireland. In Belfast, I meet with Billy at his bedside during the last days of his life and visit East Belfast Primary School. The next chapter is the story with a beginning, middle, end, and a hopeful vision for the future.
CHAPTER FOUR: A TALE OF TWO LEADERS

The structure of this study, and particularly this chapter, is my journey from a young principal wondering how to effectively influence and lead my school to wandering over to Northern Ireland to interview and experience the leadership and mentorship of a veteran school principal, to widening my perspective as a result. As such, this chapter is structured into three parts: wonder, wander, and widen.

*Wonder* begins with my first trip to my school as a new principal and reveals my first year and beyond as a leader intentionally leading invitational. My connection and relationship with Billy Tate, principal at East Belfast Primary is introduced and explored. *Wander* is the story of my visit to Belfast, Northern Ireland to sit at the bedside of Billy Tate in the last days of his life, visit East Belfast Primary School to meet the staff and students and experience the culture of the school, and to observe and reflect upon life in Belfast, Northern Ireland understanding the rich and complex political and social history as explored in chapter 2. *Widen* is the story of my return to St. Stephen’s Elementary and how my leadership changed as a result of my journey. If I thought I understood invitational leadership in my own context in southern Ontario, my perspective was substantially widened by my research trip abroad and my leadership was affected as a result. These three distinct sections form the structure of this chapter as the autoethnographic journey unfolds as invitational leadership is intentionally lived in both Southern Ontario and Belfast, revealing the applicability and vitality of inviting theory in contemporary schools.

*Wonder*

I had convinced myself I was ready to take on the responsibility. I had to. I sat in an interview six months earlier at a board room table populated by superintendents and
trustees and convinced them all that I was adequately prepared. They believed me. As a new principal, found myself unsure and questioning the judgment of the interview panel who promoted me. I was the principal of the school. I was supposed to know what I was doing in order to lead effectively wasn’t I? Self-doubt is normal. Self-imposed paralysis presented a much more significant concern.

The imposter syndrome (Clance & Imes, 1978) posits that everyone struggles with degrees of uncertainty in regard to competency, skill, knowledge, or legitimacy and is characterized by the inability to internalize accomplishments. With each new role and move into positions of greater responsibility, the feeling that one is going to be exposed as a fraud or as incompetent increases according to the imposter syndrome. While this phenomenon is normal, the degree to which an individual experiences it can help to determine self-efficacy. I was an imposter. I knew it and figured that everyone else would soon enough. I was about to not only let myself down but potentially an entire school community. I had been encouraged to apply for the job by leaders I respected tremendously but their judgment must have been flawed in my regard. What had I gotten myself into?

Leadership seemed to come naturally for me but I didn’t understand why or how. As a boy I was never the best athlete or student but I inevitably found myself as the captain of the team or the group’s spokesperson. While others appeared delighted to defer responsibility, I was usually the organizer and catalyst for change. I never sought nor ducked the spotlight. I was as happy in the background making costumes for the production or playing guitar in the back of the band for the school musical as I was playing the lead, captaining the hockey team, or standing up for our graduating class as the Valedictorian. I tended to seize opportunities and challenges as they arose but never
did so intentionally and subsequently found myself moving from the shadows to the spotlight and back again.

As a teacher I similarly embraced opportunities for leadership by pursing passions such as coaching, music, and drama. When my principal Mrs. Hughes asked me to be the “teacher in charge” of the building when she was out when I was in my second year teaching, I accepted but wondered how my colleagues, many of whom had been teaching twenty or more years would react. To my delight and surprise, my days as the teacher in charge were wonderful as my colleagues seemed more than willing to defer decisions and issues to my judgment.

When I moved schools the principal asked me to be the teacher in charge again. Despite the fact that I was new on a staff of over fifty teachers, I agreed. Once again staff was incredibly welcoming and affirming and I found the experience to be rewarding. I still wondered if I was qualified to manage a school the size of the one I was regularly left in charge of. Apparently I was a slow learner.

As a teacher in charge, consultant in the special education department, and a vice-principal, I wondered if charm played a role in my opportunities and promotions. Raised in an Irish family, I developed an aptitude for eloquence and storytelling and understood that my communication skills perhaps compensated for any deficiencies. Though I seemed to be able to talk my way both into and out of most situations, I was not convinced I would be able to maintain a charade for very long. I needed something I could hold on to that would inform my decisions and my practice. I was determined to do things on purpose for purposes which I could defend. If I was going to be an educational leader capable of not only professionally surviving but more importantly make a contribution to student learning, teacher efficacy and competency, and the community, I
would need to think, reflect, and refine my practice theoretically as well as practically. The enormity of the role weighed heavily on me as prepared as best I could.

**A Brand New Suit**

First impressions cannot be redone and I hoped to at least look like a principal if I didn’t quite feel prepared to be one. I had been thinking about the first day of school since the previous spring and approached the day with a combination of trepidation and excitement. I had chosen the suit and tie carefully, eager to make a positive first impression, walked the school yard, introduced myself to parents and students, and shared my enthusiasm for what I hoped would be a positive and productive year.

Even the successful navigation of the public address equipment made me nervous as I took a deep breath before playing the national anthem and began the morning by introducing myself to the students as their new Principal. By the time I had wished everyone good morning and welcome back, the lineup of angry parents stretched into the hallway.

I was eager to make a good impression and walked toward the crowd with an extended hand. The first parent couple expressed their displeasure with their daughter’s placement as did the next couple and then another. I could tell they were more than simply disappointed so I invited the first couple into my office to discuss further rather than have a potentially sensitive conversation in the hallway. They agreed and started toward my office when the next couple offered to join us since they had similar concerns and their daughter was in the same class, then a third couple followed as well. I allowed them into my office with the hope of being able to adequately address their concerns concurrently and thus reduce the line up with one quick meeting. I walked in behind them, not five minutes after my inaugural address as the principal, into my office with not
one but three pairs of angry parents. It would not take a principal with vast experience to understand the mistake that I had made within ten minutes of my tenure.

As each couple fed off the disappointment and anger of the other, offering support to one another as they attempted to convince me that I should move their child from their assigned class, I wondered if I had set some sort of record for the quickest public display of ineptitude by an incoming principal.

Listening to their apprehensions I began the process Donald Schon (1983) refers to as reflection ‘in’ practice and secretly longed for the moment they would leave my office to allow me to reflect ‘on’ practice. I listened with concern, assured them that their children’s education was my priority and that though their current placement would stand, that we would work together to provide an extremely positive educational experience.

Though they left disappointed with my decision, they appeared to do so respectful of both my rationale and my willingness to see it through in the face of conflict. I considered lesson one of my introduction to the role to be: deal with each situation and each angry parent one at a time.

**Playing the Part**

I spent the first days and weeks of my tenure attempting to prove to others that I was capable of being a principal. I introduced myself as “Mr. Browne” to students and parents alike, insisting on formality for titles in an effort to convey authority. I thought my first name was too informal to allow parents to address me. I assumed no one would take me seriously without formality. A school principal should be older and more experienced I thought. I found myself happily welcoming the increasing number of gray hairs that stress produced, thankful that while their colour changed, they remained on my head.

I purchased more suits, spending any increase in salary on keeping up the
appearance of a principal with new ties and suit jackets. I wore them uncomfortably at first but continued to do so in part because my wife told me I looked sharp. If I felt overwhelmed, inexperienced, and underprepared by the role and the responsibilities, I hoped that appearances, formalities, and playing the part would buy me enough time to figure out exactly how to be a principal.

A Trip to Emergency

It was mere months into my first year as principal when the responsibilities began to feel overwhelming, though I perhaps was not even aware yet. The demands of the role were building with each passing day.

I had just picked my young daughter up when I started to feel my chest tighten as I drove along the highway home. She was happily strapped into her car seat in the back drinking apple juice from her sippy cup and turning the pages of small book while I struggled to find my breath from behind the wheel. I could feel my chest tighten as I attempted to take each deep breath. I rolled the windows down, loosened my tie, and attempted to breathe slowly but felt my heart thumping more ferociously with each passing second.

I called my wife and simply told her I wasn’t feeling well. She agreed to leave work and meet me at home. I raced down the highway with my head out the window hoping the rushing cool air would invigorate me. The grip on my chest remained and intensified. I called my wife again and asked her to forgo the subway and take the nearest cab so she could meet me at home as soon as possible. I tried to hide my fear because I didn’t want to upset her but she knew something was wrong despite my attempts to project calm. She hailed a taxi and said she’d be home in 10 minutes.

I hung up the phone and tried to concentrate on the road but all I could think about
was the pain in my chest, my seeming inability to draw an adequate breath, the thumping
of my heart as it raced at what seemed like a quickening rate, and my daughter who was
innocently drinking her apple juice and staring out the window in the back. When my
arms started to go numb I called my wife back and asked her to tell the cab driver to take
her to the hospital to meet me there. I was having a heart attack I thought.

I exited the highway and sped toward St. Joseph’s Hospital in the hopes of getting
there on time. I looked into the rear view mirror at my daughter as she alternated her
gaze from the book on her lap to the scenery outside the car. She looked up at me with a
smile. I silently promised the world for the chance to see her grow up.

I arrived at emergency and was seen immediately as my daughter waited patiently
with me until my wife arrived. After some tests and consultation, the doctor informed me
that my heart was fine and that I had simply experienced an anxiety attack caused by
stress. He asked me what I did for a living and I told him I was a school principal. He
told me he wasn’t surprised.

Preparing for the Unpredictable

In order to be able to apply for a vice-principal or principal position candidates
must complete qualification courses in Ontario called Principal’s Part 1 and Principal’s
Part 2. These courses are meant to prepare candidates for eventually taking on the role by
spending time focusing on the Education Act, human resource situations and procedures,
conflict management, pedagogy, and the day to day operations of running a school.
Despite the best efforts of a carefully considered curriculum, nothing could have
adequately prepared me for my first year at the helm at St. Stephen’s Elementary School.
I remember our instructor from the Part 2 course attempting to warn us about the role:
“Most of you probably shouldn’t be here,” she said. Each candidate looked at her in
astonishment. “Don’t get me wrong,” she continued. “It is great that you are taking this course. Every teacher should. Learning about the principalship is wonderful professional development. But the fact is that most people hate conflict and avoid it at all costs. Most of this role, the role of the principal, is about dealing with conflict.”

I was a vice-principal in that course and understood that while she was likely making the statement for the desired dramatic impact it had, there was a degree of truth to her statement. I was merely a few months into the role when I took that class and understood the reality she was trying to illustrate.

Despite her best efforts to warn us about our potential compatibility with the position, she could not adequately prepare me for what would happen at St. Stephen’s in my first year. While programming and planning, facilities maintenance and community relations, discipline and instructional practice all figured prominently in the year as it progressed as anticipated, the unanticipated occupied an enormous amount of time, effort, and commitment. I dedicated myself to learning the role and being open to new experiences. I could not have imagined what that would end up meaning. I began to recognize how the best laid plans could be discarded in an instant and that calendar appointments were at times relegated to suggestions as priorities revealed themselves in obvious and ongoing ways.

As much as Principals’ Part 1 and 2 qualification courses attempted to prepare me for the role, I consistently found myself in situations that could never be anticipated or predicted. I relied on instinct, intuition, relationships, communication, and most importantly for myself as an emerging school leader and for the school community, I relied on invitational leadership as I developed the practical wisdom required to be an educational leader.
Living a Theory of Practice

My first year as a principal was both the most challenging and rewarding of my educational career. I appreciated the support of so many as we celebrated student successes, worked hard to foster community, and navigated through difficult and at times sensitive situations. I would consider the initiation year a success due in large part to my commitment to live within an idea, invitational leadership theory, and invite others to do the same.

Theory can be dismissed as utopian and incongruent with reality as the daily life of a school leader is too hectic and unpredictable for any idea to apply. I found the opposite to be true. I read ceaselessly about educational leadership theory enjoying the work of Robert Starratt (2004), Thomas Sergiovani (1996, 2006), Michael Fullan (2001, 2010), William Purkey and Betty Siegel (2003), John Novak (2002), Kenneth Leithwood (2007), James Ryan (2006), Robert Greenleaf (1977, 2002), and John Dewey (1938, 1958) among others. Each provided perspective on the immense importance of educational leadership while offering a way to think about leadership or ways in which a leader can live an educational life. I found myself reflective of my own practice and inserting specific situations that were playing out in my professional life into the readings I was consuming regularly. Theory provided me with thoughtful reflections on what it means to be an educational leader and how to refine my practice.

In many ways my theoretical readings contributed to my recognition of my numerous weaknesses as an educator and leader and the enormous potential for the utilization of others to provide their knowledge and expertise. Moreover theory clarified the ethical component to leadership and the moral obligations to support students’ development as a school leader. I understood the responsibility and committed to not
only finding out more about theory, but to applying to my practice so I could refine and improve. I care about education and am passionate about leadership. I write about it to make a contribution to the literature and influence fellow leaders and leadership candidates and I also do so to further influence my practice as the process of writing contributes to the reflection and refinement process.

**Invitational Leadership**

Though I recognize the influence that many scholars have made on my practice as a school principal, none more so than the theory of invitational leadership as it seems to encapsulate the best from each theory while providing a cohesive foundational core on which to *be*, rather than act. Inviting leadership resonated with my philosophy of education and leadership and challenged the way in which educational leaders lead. As I read Purkey (1978), Novak (2002), and DiBiase’s work (Novak & DiBiase, 2006), I recognized myself in their writings about leadership theory while I was challenged to do so intentionally, thoughtfully, and fully. I committed to becoming an “Invitational Leader” and to the creation of an inviting school. Invitational leadership resonated with me deeply as I recognized that my opportunities to take on leadership throughout my life could be attributed in part to caring about others’ education and development, being hopeful, trusting of others, and optimistic for better a better future. It was not until I came to fully understand invitational leadership that I realized I was missing an aspect of leadership that had eluded me. It was not until I embraced *intentionality* as an attribute of leadership that I could begin to lead from an invitational perspective.

**The Five Ps**

An inviting leader has a caring core and is trustful, optimistic, hopeful, and intentional about it all. These priorities are revealed through what inviting leaders refer to

as the 5 Ps: places, people, programs, policies, and processes. An inviting school fosters a physical space that is welcoming and conducive to learning (place), utilizes the unique talents and contributions of others to make the school a better place (people), establishes guiding principles which invite stakeholders to contribute to the betterment of the school (policies), offers curricula which is inclusive and optimistic (programs), and engages in procedures that involve all stakeholders place the needs of the students and school at the forefront (processes). Each of the five Ps contributes to the culture of the school. Intentionally approaching each from an inviting perspective is what collectively establishes an inviting school.

A school is more than a vision for education as articulated in a mission statement. In order to fulfill the aspirational educational goals, a leader is faced with everything from school improvement planning to leaky roofs, dangerous kiss and ride programs, and clogged toilets. Under the direction of four unique principals I attempted to learn as much as possible in order to eventually have all the answers readily available when I became a principal. I realize those answers do not exist.

As I faced the prospect of running my own school, I was determined to approach leadership with a theory of practice that I could hold on to. I wanted to do things on purpose for purposes I could defend. Invitational leadership provided a theory of practice congruent with my optimistic, trusting, hopeful, and caring approach to education. Doing so intentionally eased my anxiety as I approached my first year in what I consider to be the most important profession.

**Place**

I started to lead invitationaly with place, as it was the “P” that I had the most immediate influence over before school began. My relationship with each staff member
and programs, policies, and processes would develop once staff, students and parents arrived back for another school year. August provided an opportunity to influence the “place” before teachers arrived back and I began with the setup of my office.

When I visited the outgoing principal in the spring of the previous academic year I was struck by how small the principal’s office was at the time. The principal’s office seemed barely small enough to adequately welcome more than a guest or two at a time. Greeted into the office as the in-coming principal in the spring, I felt like I needed to suck in my stomach to squeeze into the room.

The desk started at the wall and cut the room in half while the principal’s large chair commanded attention from the other side of the desk. Two small chairs sat opposite the desk for guests to squeeze into. I sat with him that spring morning wondering how I was going to fit those essential elements from my office into the space and how I could make it more inviting.

With the boxes stacked precariously outside, I stood in the doorway and considered different configurations. I wanted to set the office up intentionally to create a space that was revealing of my priorities as an educator and inviting leader. I moved two of the three filing cabinets out, and removed the large desk from the middle of the room and replaced it with a smaller version. I then promptly left all the boxes piled where they were and went out to the local hardware store. I returned with a can of interior paint called “Manchester Tan” and “Decorator’s White” for the trim along with new rollers, a brush and paint tray. With the cabinets and desk gone I put on an old gym shirt I had in the car and started to paint.

Staff members began to arrive in early August when word got out that the new principal was in the school early painting his office. I introduced myself over those two
days with paint in my hair, face and clothes. Painting the room the lighter shade helped to brighten it up and make the room lighter and hopefully more welcoming. I was the new principal and intended to be so for many years to come. When the paint was dry, I pushed my desk up against the wall beneath the enormous bulletin board filled with the all the schedules, phone numbers, and emergency contacts from the previous year.

I had come to recognize a desk as a symbol of power. I had been a vice-principal in three different schools and in each one I left the desk where it was when I took over the role. All three desks sat ominously in the middle of the room and I sat on the other side, welcoming students, teachers, and parents into my office as they sat on one side while I maintained my space on the other. I realized the setup of each office was incongruent with my perception of my leadership style and certainly with that of an invitational leader but I left each configuration as it was in part because of my insecurity about my legitimacy as a leader. As a new principal, I seized the opportunity to move beyond my insecurities and begin to create an inviting school from the office out. With my desk up against the wall the room was opened up, appeared larger, and allowed for me to simply turn my body or chair to openly greet any guest.

I removed everything from the bulletin board and carefully filed away the few important pieces of information revealing the empty brown cork beneath. I would leave it empty to be filled with student work shared with me as the year would progress. The bookcases were filled with old binders from workshops and in-services over the years. I removed all the binders, salvaged what was necessary and threw out the rest. In their stead, I placed books that were important to me as a teacher and lover of literature. Classics, poetry, philosophy, historical graphic novels, and comic books shared space with books about pedagogical practice and educational theory. Reading is important and
I intended to make my affection obvious to all and establish a lending and borrowing system for students and staff. I placed my degrees up on the walls because education is important, art on another wall because art is important, family photographs and my daughter’s pre-school paintings to highlight the importance of family. I had been given a piece of art as a departing gift created by a parent who many considered difficult at my former school. The art was inadvertently but amazingly named after my mother. I hung it prominently to remind me of the significance of parent partnership and working cooperatively, despite differences in opinion, in the best interests of students. I hung my “art” beside my desk: two framed pieces of paper stating “I wish I could paint” and “I wish I could draw” as not only true statements of my artistic ability, but also something I refer to when speaking with students and parents about our strengths and weaknesses we all have.

With the filing cabinets stored away in our storage room I located a circular table which fit nicely into the corner of the office and placed chairs on either side. Instead of sitting behind a desk, I wanted a conference space to comfortably sit and talk to staff, students, or parents. As I came to understand as a vice-principal, listening and counseling is as important as curriculum and pedagogical practice. The room became a welcoming place to host small meetings or individual conferences with others.

I walked the halls and took notice of the signs throughout the school. I removed the signs printed to look like stop signs which reminded visitors to sign in at the office or that our school was a peanut free zone. In their place I placed signs that invited visitors to the school and welcomed them into the office and others that thanked everyone for helping to keep all students safe by keeping peanut products out of school lunches and snacks. The reserved parking sign for the principal was the next to go. I approached our
custodian about removing it and replacing it with a visitor’s sign. He told me that the
space had always been reserved for the principal. I said that I planned to park in the back.
He told me that the previous principal parked there, fifteen feet from the main front doors,
in case a student was injured and he had to rush them to the hospital. I told him I was
comfortable calling 911 if such a situation ever occurred. I chose the parking spot
furthest from the school in the back lot and began to park there. The removal of the sign
was noticed immediately by staff and parents alike.

As Labour Day approached, more staff appeared in the school which provided me
the opportunity to introduce myself and cultivate relationships. At the first staff meeting
of the year before the arrival of the student, I attempted to convey a degree of competency
as we planned for the students’ arrival, unsure of how convincing it was. I informed
everyone that I was parking in the back and invited others to join me in order to leave
more spaces at front of the school for visitors. I also invited every staff member to meet
with me before the Thanksgiving weekend in October so we could sit down together and
get to know one another. I planned to spend time as much time as possible getting to
know each person in the school.

People

I often hear others say “I’m not good with names. I remember faces, but I’m
terrible with names.” In order to create an inviting environment where the gifts and
talents of all are fostered and utilized for the benefit of the organization, the simple act of
remembering someone’s name and as much about them as possible reveals the priority of
people to the success of the school. Creating an inviting school involves welcoming and
utilizing the diverse talents of everyone involved in the school: staff, students, and
parents. As an invitational leader I made it my priority to remember everyone’s name,
and learn a little about them. I was intentional about meeting every student and parent I could and prided myself on knowing every student in the school; their siblings, parents, and some background by the end of the year.

I got to know each parent by name and profession and engaged them in conversations about their children, the school, as well as other interests to get to know them as more than simply “a parent.” I found out later in the year how quickly word spread around the community that I was investing in people and that I actually knew all students names.

The simple act of remembering someone’s name indicates to them that I consider them important, special, and unique enough to remember. It values each individual as a contributor to the school no matter how large or small the contribution. The building itself is not what makes the school but rather it is the people within. Investing in the relationships within the building through the simple act of knowing each individual is an extremely powerful statement.

At the August staff meeting, I asked each staff member to make an appointment with me before the Thanksgiving Day weekend in mid-October for us to sit down one on one for an hour or so to talk about them: their career, future plans, impressions and opinions of the school, family life, talents, and expertise. I found out so many interesting and wonderful things about each unique staff member both personally and professionally which helped me to understand more about each individual and the school as a whole. By the time I had met with the last member of staff that fall I had spent over fifty hours in individual meetings and considered it the most wonderful and effective use of my time.

Connecting with the school Council Chair to get his input and feedback on the school and community was important in order to develop a positive partnership with the
As a principal committed to inviting leadership, moving toward parental partnership was paramount to the creation of an inviting school. When I arrived, parents were on the yard and in the hallways. A class would be interrupted by a parent knocking on the door for a quick chat and impromptu conversations would take place throughout the hallways. I wanted to invite parents into the school and become active participants in their children’s education while supporting staff by providing an environment free from interruptions and committed to maximizing time to work with students.

I used Curriculum Night as an opportunity to address the entire school community. I spoke about the amazing staff I was getting to know, the wonderful students I had met at the school, and the reputation of a supportive parent community. I began with the yard.

“The school yard is a wonderful place for students to interact with one another socially as many lessons are learned through play,” I said. “It is important that we maintain the yard as a safe place for students to play with their classmates free from parental intervention. We have staff who supervise at all times and will keep them safe. Moreover it is important for staff to know who is supposed to be on the yard and who is
not. For safety reasons, it is important to be able to identify an adult on the yard who should not be quickly and efficiently and we are able to do so because all staff will wear a fluorescent vest.”

There were many nodding heads in the audience as I continued. “We value instructional time tremendously,” I said. “Maximizing the time our students have with our teachers free from interruptions is important to student learning. Moreover, just like on the yard, it is important for us to be able to identify who should be in the school as our guests are welcome, and who, perhaps, should not be in the school.” Heads continued to nod, others shook.

I knew that I the re-establishment of boundaries was important to the creation of an inviting school, as opposite as it seemed. I recognized the immense talents and gifts that the parent community could provide and wanted to utilize them in the best possible ways which were focused on student success and the support of our school improvement plans. Parents were welcomed into the school to support classroom projects and initiatives and our volunteers and committees actually increased in number. While many had wanted to get involved, they resisted invitations to contribute to the school. I began to get involved in some of the committees. Each time a parent committee met I attended for at least a portion to thank them for their contributions and ask if I could assist. I then shared with the staff some of the great plans and initiatives the parent committees were suggesting. With parental assistance we became intentional about the creation of committees which were more than simply milk and special lunch programs to include academic-focused groups as well. The establishment of the Co-Curricular Cultural committee, the ongoing Literacy committee, the math Olympics and Sunshine Math committee, and the French club all highlighted to the rest of the parent community,
students, and particularly staff the potential for increased partnership that was focused on supporting student learning. A willingness to participate in the school was an obvious asset and the meeting at the beginning of the year helped to provide focus to a large group of talented parents who were willing to volunteer.

I remember the day everything came together for me in terms of our school as a community. It was Shrove Tuesday or “Pancake Tuesday” in February of that first year. Our volunteer groups had been operating efficiently and effectively with a sense of direction while respecting the boundaries of the curriculum and expertise of the teachers. A teacher on staff had volunteered her class to help lead the cooking and distribution of pancakes that morning and enlisted the help of some classroom parents who organized themselves to help. Despite some blown fuses from ten pancake griddles cooking simultaneously, the morning got off to a wonderful start. There were parents and teachers busily beating the mix and flipping pancakes and students distributing to each classroom and pouring the syrup. The school came together in syrupy harmony that morning as I recognized the amazing time and talents that our parents were willing to donate to the school and the wonderfully welcoming and accommodating teachers who enjoyed the community connection and support.

The parent community had always been willing to get involved but did so in a variety of disconnected ways which did not always seem to support the staff or students. We talked as a group about our partnership that was built on care for our students and their children, our hope that a better future is possible for our students, and optimism that it can be accomplished together, but there did not seem to be intentionality about the organization of the community. I talked about how we could focus our efforts on support staff and students and the creation of an inviting school which used parental volunteers to
intentionally support the goals of the school. The parents in attendance appeared to agree and as time continued throughout the year, volunteerism grew with the increased engagement of more and more parent volunteers.

Parents came into the school respectful of the importance of instructional time in the classroom and of the teachers and support staff who were doing wonderful things for their children. Focused volunteerism provided direction that supported student goals while teachers and staff recognized how fortunate we are to have such dedicated and talented people who are willing to give of themselves to support their children and the school. Instead of a divide between staff and parents I was introduced to as a young teacher, these barriers became eroded more quickly than I could have imagined. Parents and staff understood that we have the same goals and can accomplish so much more in partnership than in opposition to one another.

This investment in the human potential in the school not only increased the number of talented and willing adults in the school committed to student success but further contributed to the building of relationships and the establishment of community. The more parents saw the positive things happening in the classrooms, the more they supported teachers. The more teachers utilized volunteers in ways that were supportive of their classroom and school goals the more they appreciated how fortunate we are to have such wonderful volunteers.

The “Kiss and Ride” drop off system where parents can drop their children off in the morning along with the regular morning bus routine can be a contentious issue since safety for students co-exists with the convenience for parents attempting to drop their children off and get to work. I wanted to understand how the existing system worked to ensure safety as best I could and to get out and meet as many parents and students as
possible. I began to greet the buses each morning as the students arrived and then moving on to the side of the school to greet each car and open doors. The original intention was to keep traffic flowing quickly and safely but this people-centric morning routine quickly became much more than that. A warm “good morning” to each student as they exited the bus and walked toward the yard or as they exited their parent’s car became one of the highlights of my day. I wanted to become involved in the morning ritual in order to actively welcome students and parents each morning to the school.

This practice set a positive tone for the staff immediately as they appreciated the active engagement in student safety and supervision. Parents appeared apprehensive at first but quickly grew to love this morning ritual as it made drop off quicker and safer while allowing me to stay in touch with parents each day to quickly say hello or to quickly follow up on any situations or conversations. I’m also convinced this lessened the number of phone calls and meetings throughout the day while setting a positive example of an inviting and welcoming school.

At the end of the school day being outside for bus duty to similarly welcome parents for pick up, assist students to their buses efficiently and direct traffic for ease and safety for both buses and cars revealed accessibility, priorities, and an open leadership style.

Daily routines included classroom visits and yard duty for supervision. These practices invited more interaction and communication with students. Not only did this allow for more visibility around the school but it afforded a greater understanding of the school, staff, and students on a social level. It is easy to profess priorities, but practices reveal priorities.

**Policies**

I discovered that the simple act of leaving my door open to be a strong indicator
of invitational leadership. Our school secretary had developed an amazing skill of intercepting potential disruptions from staff, students, or parents based on her many years of experience. We spoke at length about maintaining an effective balance which encouraged an open and inviting office with the need for discretion when engaged in sensitive issues with staff, students or parents. We decided that though there would always be times which confidentiality needed to be maintained and assured, the office and by extension the school, should not operate as if all situations and issues are of that nature. We embraced an inviting philosophy which would be our foundation on which we approached all situations, and then made decisions individually as required regarding confidentiality, privacy, and discretion. This new policy was noticed and appreciated by staff and parents as access for questions and concerns revealed our priorities of supporting students, staff, and the community.

At the first staff meeting of the year I introduced a new policy which appeared to challenge pre-existing notions of “the Principal’s office.” During that August meeting I thought it important to establish this new policy as I anticipated it would have a distinct influence on the culture of the school and contribute to our goal of creating an inviting school.

I asked teachers to keep an eye out for students in their class or around the school who were doing “good things” and to send them to the office to see me once identified. Examples included random acts of kindness or displays of thoughtful caring behavior which were to be applauded and recognized by me in the office. I asked for students who were steadily improving academically, scored highly on a test or assignment or had completed a project they were particularly proud of. As simple as this sounded the policy took both the staff and students a while to get used to as the principal’s office had long
been considered a destination for students requiring discipline or poor effort. Parents would often remark to their son or daughter “You don’t want to find yourself in Mr. Browne’s office!” to which I would respond that I hoped I would see them there and explained my new policy.

I was delighted as students came to my office with poems they had written to read to me, a test to share, or a story about how they were caught doing something special for others in the school. Students seemed to appreciate being recognized and the principal’s office started to become demystified from traditional perceptions of discipline and fear—perceptions which I have found to be ever-present still despite an invitational approach. This perception turned from a scary place to go to an inviting place where scholarship and citizenship are celebrated.

The corkboard I had cleared when I moved into the office was quickly populated with students’ tests, projects, cards, and letters as I began to place students’ work onto large corkboard as they came down to the office to share. The board was filled quickly with evidence of student success and pride. School policies continue to reflect the consideration of the best interests of the students.

Processes

In order to understand the school, I needed to tap into the expertise of the staff who understood more intimately the intricacies of the school and community. I invited staff to share their ideas for what they thought worked well in the school, what they would like to maintain and anything they would like to implement that was not in place. I asked them to submit a simple “start, stop, continue” idea to me on paper which shared with me something they would like to start at the school, something they would like to stop, and something they would like to continue. This simple process of inviting input
valued their immense knowledge and signaled a more collaborative approach to processes within the school.

This process revealed that the staff and students were not happy with the school crest as it had existed for many years and were interested in moving in a new direction. Instead of brainstorming internally I invited the entire school community to submit their ideas for a new school crest.

The ideas started to roll in on 8’x11’ paper with a variety of mascots, crests, and logos for consideration. Submissions arrived from the Kindergarten students all the way up to the Grade 8s. By the time all were received more than 80% of the school’s population participated in the submission process.

Every submission was celebrated as it was mounted on a piece of construction paper and added each student’s name and room number in the bottom corner to display around the school as a “school crest art show.” The ideas were exciting and the whole school seemed to delight in the variety of submissions that were shared throughout the school. Students enjoyed viewing their work mounted and carefully considered and discussed the unique entries. The process created dialogue and engagement as conversations about the potential crests could be heard in the classrooms, hallways, staff room, and parking lot.

The many ideas were narrowed down to three which were then taken and combined to make up what is now the school crest of St. Stephen’s Elementary School. Those original three submissions along with an explanation of the project, how they were chosen, what they represent, and the new crest that resulted now hangs in the front hallway as a remembrance of their work and of our collective contributions to change and community. The school crest project engaged the entire community in the contribution
and decision making process which resulted in the new public symbol of the school. Not only was it a wonderful exercise in collective creativity but it also highlighted our commitment to inviting ideas and collaborative contributions to the community.

**Programs**

As a school, we committed to making social justice a priority so that our students could recognize their responsibility to serve others. We initiated a program to encourage students to respond to the needs of others rather than themselves. I invited the chair of our Parent Council to partner with us as we introduced our program to our students in support of Bethany Kids Children’s Hospital in Kijabe, Kenya. At Bethany Kids Hospital, children with disabilities from across Africa, and specifically from Kenya and Somalia, are given medical attention and important surgeries to address medical issues such as spina bifida, hydrocephalus, club foot, and cleft palate. Children are also operated on as a result of burns, trauma from war, and other physical and developmental disabilities. Surgeries are performed free as the doctors and hospital operates solely on donations. We showed our students photos of the children, hospital, and doctors, and challenged them to make a difference.

The project was simple: students were encouraged to give only their own money. They were not allowed to ask for it from friends of family to give. Instead they were challenged to give only money which they had earned themselves through chores, allowances or any other way in which they could earn money for themselves that they could chose to spend or give away. They were given a specific timeline for the project but no financial goals were stated. We wanted students to give generously and without the glare and influence of what others were giving. There were no promises of pizza
parties or prizes for the largest contributions. All donations were secret as only the donors would know their contribution.

Parents were then invited to become involved in the spirit of support for their children and the community as we encouraged them to match their children’s contribution penny for penny. The Parent Council further encouraged the support of the community by offering a financial contribution to match the students and initiate giving in a public way. The rules were simple, the timelines clear, and the students were reminded by their teachers and with daily announcements.

During the first week, students began to talk about how they were giving away portions of their allowance while others suggested extra chores around the house. By the second week the buzz around the school was infectious. Grade 4 students who had hosted a cupcake sale on their front lawn to earn money to give away while some Grade 5s took advantage of the cold early March temperatures to host a similar hot chocolate sale. Other students purchased pizza and set up a stand in front of the local high school selling pizza to students while a class organized a crazy hair day for a dollar a student. Students who were celebrating important religious and cultural milestones such as First Communion and Confirmation donated all the money they received as gifts. Teachers actively encouraged students and lead by example by openly discussing ways in which they were going to contribute while the talk around the parking lot turned to their children’s ideas and the worthiness of the project to help those less fortunate. Parents hosted jewelry sales at their homes to generate funds. The excitement around the school was palpable as the community rallied together in support of the children in Kenya and the physicians and nurses who cared for them. Parents were excited about what the staff
did and teachers applauded the efforts of the parents, and together recognized the commitment of the students to service and philanthropy.

When this program was initiated we had hoped to bring the community together, united in a common ethical goal of the support of children in need. We had hoped that students would recognize that they could think globally and act locally and understand that their efforts, no matter how large or small, can make an impact. We intended to inspire students to place the needs of others before their own and plant the seeds of philanthropy within each student recognizing that at each assembly we was speaking to our future leaders who might chose a life of radical charity or simply recognize the importance of serving others. Sometimes when we take on projects like this we only recognize the impact through a retrospective lens, however, we would not have to wait that long.

I received a phone call from a parent during the last week of the project asking if it would be alright if her son made his contribution later the next week. She informed me that his birthday was on the weekend and that he had invited all of the students in both Grade 6 classes to his party. In lieu of traditional birthday gifts he had asked instead for contributions for Bethany. On Monday morning he walked into my office and personally handed me over $600. He understood that he didn’t need anything, not in comparison to the children at Bethany. Similarly, a Grade 2 student hosted a birthday party with a similar request from her attendees. She gave half to Bethany, and half to sponsor a family in another country.

This program was intentional in its goal of bringing the community together in support of a common moral purpose as students learned through active engagement and in the process re-established the sense of community and positive school culture.
Trust and Respect

As the principal of a small school, I did not have a vice principal. Instead, the school board recognizes one staff member of my choosing to act as the “principal designate” when I was unavailable and out of the building. I was fortunate to have a teacher on staff that has strong leadership ability and a desire to improve their leadership skills with an eye toward a future principal position.

I cared for the school and students by intentionally selecting a leader whose judgment I trusted, whose ethics I respected, and who is optimistic. When I was out of the building I trusted that she would call me if she wanted my opinion or if there was a situation which required my immediate knowledge or attention.

Often at principal meetings I observe colleagues answering their phones or checking their BlackBerrys and then rushing out of the meeting to return to the school. I recognize that there are situations which require the principal to return to handle but when I inquired upon their return or at the next meeting I often found the situations which they returned to the school to handle to be relatively minor.

We may say that we respect and trust but our actions often betray our words.

There were times when my designate called me with a concern or situation and I realized that in order to support her development as a leader that I had to trust her to handle the situation appropriately. If I rushed back to the school to take over, I would be sending a message to her and everyone involved that I didn’t trust her judgment, respect her decisions, or was optimistic about her ability to handle the situation. When a situation arose, I offered advice if required and we brainstormed solutions as a team. I made it clear that I trusted her to handle everything appropriately and was optimistic about the outcome. By reflecting on this relationship I led intentionally and valued the contribution
of her as an integral staff member.

What I found is that trusting and respecting the judgment of my designate not only made our organization better but also easier. When everyone contributed to the best of their ability, the school ran efficiently and safely. A leader who tries to do everything him or herself takes on too much and nothing runs well. Trusting and respecting important relationships encourages each member to contribute to the best of their ability.

**Managing Thoughtfulness, Care, and Optimism**

Education is a fundamentally caring profession. Caring for students requires getting involved in their educational lives in the classroom and around the school. Words are important and even more so when they are supported with actions. Displaying empathy and care for students, staff, and their families has involved developing a rich understanding of their lives and interests. I tried to get to know about students’ hockey tournaments and dance recitals, their hopes, dreams and aspirations. Inquiring about a championship game with a student or parent displayed a caring that goes beyond academics and discipline. A parent that is struggling with an illness impacts the student and the classroom. Knowing about these situations enabled me to help and support when I can. Parents, students, and staff knew that I understood the impact of the complexity of our lives and how they interact within the school and affect learning. An open, caring, and respectful stance invites us into one another’s lives as we are partners in education. This mutual trust and respect furthered our relationships.

Practicing thoughtfulness means writing thank you notes to staff members or parents for their contributions to the school. It means inviting students to my office to recognize them for excellent work or acts of kindness. Following up with a parent a month after the resolution of a sensitive situation to see how everything is going reveals a
deep respect and care. Thoughtfulness is the culmination of the “little things”—asking about a sick relative, a soccer game, a new business venture, a risk taken within the classroom, a goal accomplished, or even commenting on a new haircut reveal a connection to each individual that supports the belief that everyone is an important, unique, and special. A leader develops and fosters these relationships understanding the value of people and relationships.

**Managing an Educational Life**

There is often a divide between what we know we should do and what we actually do. I would guess that any school Principal would say how important it is to be connected and engaged with students, staff, and parents regularly in order to be an effective leader. Being “visible” in the school, yard, and classrooms is something that school leaders need to be but it can be very difficult in reality.

A school Principal has a plethora of situations that are presented on a regular basis. My agenda is usually full but emergencies and unforeseen priorities can negate even the most important meeting. As imperative as it is to get out onto the yard and into classes it can be a struggle to leave the office on a regular basis. Managing multiple situations, priorities, and responsibilities requires being intentional about priorities and time management. I decided that I had to prioritize my priorities and work into my schedule non-negotiable blocks of time in order to preserve and foster my relationships within the school and community. It is easy to talk about priorities but I understood that my actions are a more accurate reflection of them.

I began my day every day by writing news and information on the staff whiteboard by the mailboxes which became the place where staff congregate in the morning to touch base with me, one another, and to stay up to date on school events and
activities. After connecting with them each morning I headed outside to the buses and welcomed students as they arrived each day. After the last bus, I walked around to the back of the school to the kiss and ride.

I went outside for morning recess to find out who was playing with who, how the students were interacting, and to connect with students on a personal level by playing games with them or walking and talking. After morning recess I participated in my daily walk-about the school, stopping in a different class each day for the better part of a lesson. At the end of the day I enjoyed being outside for dismissal and student pick up as I was able to wish students and parents a good night while ensuring that students got onto the bus safely and the pickup is safe, smooth, and efficient.

The rest of my day was predictably unpredictable so I found it important to make these parts of my day routine and virtually non-negotiable. By making these parts of my day part of my routine, I ensured being able to connect with everyone and live out my expressed priority.

Managing an educational life requires intentional reflection on the daily calendar. Paperwork and deadlines cannot be ignored but I tended to not prioritize them over the opportunity to engage with students. I have learned to accept the passing of deadlines at times and have received a “gentle reminder” call or email at times for reports or responses to the board. I recognized that my priority of student and staff should be obvious to all. Talking the talk is not as effective as living it. Recognizing that in order to live these priorities I managed my time and schedule contributes to my ability to lead an inviting school.
Conflict to Conciliation

I came to understand that I cannot control who walks in the door, calls me on the phone, or what students ultimately do in the yard or in the classroom. What I can control is the way I approach each situation and each individual involved. Intentionally doing so full of hope and optimism in each individual and in the potential for positive resolution of a situation, trusting that people are good people hoping for good things no matter how they present themselves, and caring for each member of the organization and community provides a positive perspective to address any situation.

Conflict is inevitable. It can consume an enormous amount of a school leaders’ time and talents. An inviting perspective allows each situation to be regarded as a potential for consolidation and positive consensus. Embracing an inviting approach to leadership changed my perspective on conflict from something to be avoided to something to be embraced if handled appropriately.

Every parent who sends their child off to school each day does so hopeful that they will do well academically and socially. Each student is the most important person in that parent’s life and the centre of their universe. A parent who advocates for their child is welcomed as students who have parents who are actively engaged in their education tend to perform better at school. As a principal I respect a parent who is doing what they think they need to do in order to advocate for their child. This can and has taken many forms from positive conversations with the teacher and myself to strongly worded letters or confrontations in the office or during interviews.

Individuals have different ideas about how to approach situations and how to best have their concerns heard and respected. Some will write letters, others will telephone, while some feel that the louder or stronger they protest the greater the potential for their
concern to be taken seriously. Each individual brings into every situation different burdens and realities from their personal and professional lives which inevitably reveal themselves in a conflict situation. When discussing their children rationality, sound judgment is often replaced with emotion and irrationality. Approaching these situations from an inviting perspective allows for the potential for a positive outcome that respects the dignity of all.

Mr. Jacobs and the 6 Cs

My introduction to Mr. Jacobs came in September of his first year at our school when he expressed his displeasure at the cleanliness of the Junior Kindergarten cubby holes. “Is there a spill or something specific that you are worried about?” I asked. “It’s the dust and dirt,” he said. “They are gritty and sandy.”

I explained to Mr. Jacobs that the cubby holes were used by our Junior Kindergarten students to store their outdoor shoes while they were wearing their indoor shoes and that the transfer of some grit from outdoor shoes onto the inside of the cubby holes was inevitable despite the fact that they are cleaned each night by our custodian. He wasn’t satisfied. “If you won’t have them cleaned I’ll come in with a bucket and cloth myself,” he replied.

I spent some time listening to his concerns and offering assurances that they are addressed each evening by our staff but despite this attention, dirt could remain given the primary usage of the cubby holes. I thanked him for bringing the situation to my attention.

The simplicity and seemingly minor complaint about infiltration of outdoor grit into students’ cubby holes became indicative of Mr. Jacobs’ future interaction with staff. He began to regularly come to school mere minutes after dismissal demanding to speak
with his child’s teacher and if she was not available, with me about something he was angry about. He questioned everything from the competency of the teacher to the curriculum itself to the other students in the classroom. He complained if the teacher wrote in red pen in the agenda, failed to wear running shoes in gym class, and wondered why by the end of September his daughter’s fellow Grade 3 students were not using watercolours yet in art class. When his daughter would forget her agenda, Mr. Jacobs would be in the school within minutes accusing the teacher of incompetency. He insisted the teacher didn’t teach math correctly, that the program was inadequate, and that his daughter did not know the difference between a workbook and a textbook which further confirmed in his mind that the teacher was not doing her job.

I was optimistic that I could address his concerns adequately and respected the fact that he was attempting to advocate for his child. I communicated my trust in my teachers and as I listened to each concern and conferred with about next steps. However the impromptu meetings and questioning of staff continued. Though we were able to address every concern no matter how large or small, Mr. Jacobs continued to visit regularly and offer criticism that we were finding less than constructive and we risked the demoralization of staff if it continued.

As an intentionally inviting Principal, I invited him to become more involved in the school on one of our various committees and within the classroom. As an optimistic and trusting person, I was convinced that the more involved he was in the school, the more he would see the wonderful experiences that our students were engaged in and the talented and dedicated teachers who delivered them so consistently. Mr. Jacobs continued his ongoing negativity. While volunteering in the classroom reading program he regularly commented on the teacher’s methods and the abilities of the other students in
the room while parents who participated on committees with him began to voice their concerns to me about his constant negative comments about the committees, teachers, and the school in general.

Having shown concern and conferred with him I knew it was time to confront. I booked a time to speak about his on-going complaints about our programs and teachers and about the impromptu meetings with teachers or myself without a prior appointment. While we continued to be intentional about creating a welcoming environment in our inviting school, his constant presence, complaints, and negativity were wearing staff down.

During our conversation I suggested that a break from his visits to school would perhaps provide some clarity and that he would recognize and trust our staff with time. I respectfully requested that he refrain from communicating directly with teachers until after the first term reports went home, after which we could sit down together to discuss his daughter’s progress.

At the report card meetings Mr. Jacobs openly questioned the teachers as I consistently re-directed him back to the discussion of his daughter’s progress. Despite my presence and that of his wife, he expressed his distrust of our staff and displeasure with the programming. After the meetings I informed him that our arrangement would have to continue and that all communication would need to come through me.

A few weeks went by before he arrived at school again waiting for me in the office as I arrived in the morning. I could have told him that he needed to make an appointment and I knew that our relationship was continuing to head in the wrong direction, but my optimism persuaded me that I could still bring him on board and help him to see the plethora of positives and garner his support. I welcomed him into my
office where he expressed displeasure with his daughter’s science notes and wondered how they would be able to study for an upcoming test. I spoke with him later in the afternoon and he told me that everything I had done to prepare a package to help his daughter was not good enough.

The next morning I hosted two upset parents in my office who expressed their concerns about their continued involvement in volunteering in the school based on a recent interaction with Mr. Jacobs. Despite my trust, optimism, respect, and intentionality in the process of concern, conferring, consulting, and confronting, I understood the enormous impact that Mr. Jacobs was making on the culture of the school with the teachers, parents, and myself. I resolved to move to the combative phase.

I was outside in the morning for my regular Kiss and Ride welcome for parents and students when the Jacob’s car pulled into the lot. I recognized Mrs. Jacobs behind the wheel and I asked for a quick word.

“It’s Ron isn’t it?” she said, referring to Mr. Jacobs. “He’s not the easiest person to deal with is he?” “I would appreciate the opportunity to speak with both of you about this,” I replied. She graciously accepted my invitation and we agreed upon a date and time to meet to discuss further.

After unintentionally awkward initial pleasantries, I briefly recounted our numerous interactions and explained the negative impact they were having on the school. From the red pen and gym shoes to the questioning and critiquing of professional competency, our staff were upset and fed up. Parents were distressed with their interactions and the culture of the school was in jeopardy of degrading further. I explained that if he was as unhappy as he professed to be that there were other educational options for his children, as disappointed as we would be to see his girls leave.
I told him that he was no longer welcome in the school. All communication and concerns should come through Mrs. Jacobs until further notice. I informed him that he was welcome for report card interviews after the second and third report card but he should not be in the school for any other reason. I offered tissue from my desk as they both began to weep openly and loudly. I offered the opportunity to meet again at the end of the school year to re-assess this situation and consider the re-instatement of her privileges within the school.

At the beginning of the meeting Mr. Jacobs aggressively defended himself as his wife helped him to recognize how his behavior impacted the school. By the end of the meeting, there were many tears and regrets.

My inviting stance had provided multiple opportunities for change as I continued to hope that Mr. Jacobs would become a positive member of our community. However, being an inviting leader does not mean being pushed around. In order to maintain an inviting school in which the students, staff, and parents felt positive and optimistic, I understood that I could no longer allow him to negatively impact the community.

Having moved to the combative phase I knew that the conciliatory stage would be extremely important. Though this conflict lasted for the better part of an entire academic year June provided an excellent opportunity to re-connect and develop a positive plan to move forward together. I invited Mr. and Mrs. Jacobs in again re-affirmed our on-going delight with having their daughters in our school and how we were looking forward to positive commitment and contributions to our school. We agreed to move forward together with a new spirit of cooperation and respect.

I regretted the fact that the situation had gotten as far as it did but I resolved to continue to give every opportunity to come to resolution earlier in the future with any
conflict. The situation further taught me that conflict may be inevitable but by going through each stage: concern, consult, confer, confront, combat, and conciliation is important to respect individual involved in the process and attempt to resolve at each stage. The six Cs invite amicable, respectful consultation, and conferencing as a starting point instead of jumping to combat straight away. Inviting leadership respects the importance of relationships and that respect is revealed clearly in the way in which a conflict situation is handled.

The six Cs process invited a stage which I may not have naturally come to without the intentional reflection upon the process. Conciliation is perhaps the most important and most difficult stage of conflict as it recognizes the value of relationships and the desire to move forward positively with the conflict in the past. Following the initial stages of the six Cs may appear logical and reasonable to an inviting leader and the combat stage, though not desirable, may sometimes be inevitable. Moving to conciliation reveals the priority of relationships within the school and the people-centric focus of an inviting school.

**Transitioning Beyond Year One**

With my first year as a principal under my belt I entered into my second August, my second first day of school and my second curriculum night. I had the benefit of a year’s worth of experiences to reflect upon and the knowledge that I had navigated my first year at the helm of St. Stephen’s Elementary successfully. Approaching the year from an inviting perspective gave me a theory of practice to reflect upon and consider in a real context on a daily basis. An inviting approach to leadership required an intentional shift in perspective to an optimistic, hopeful, trusting, and caring stance which influenced all decisions large and small, policies, programs, and projects.
Approaching the role of principal from an intentionally inviting perspective was meant to provide me with support as I began such a new and demanding role. I wanted to do things on purpose with purposes I could defend and reflect upon experiences and refine for future practice. The influence of an inviting approach impacted much more than my leadership as it spread throughout the entire community. While the reality of unexpected situations, irate parents, discipline with students, staff conflict, Ministry and school board pressure, standardized testing results, community initiatives and priorities, tragedies and celebrations continued into the next year and beyond, being able to consistently approach each situation invitational supported a consistent approach. Inviting leadership theory suggested a way to be, rather than a way to act. As I committed to living and leading from an invitational perspective, I found support from across the Atlantic from veteran principal whose similar approach in a unique context provided an example of what was possible.

**Connecting With Billy**

I first met Billy Tate in the fall of 2008 via a virtual introduction by my supervisor Dr. John Novak. Billy had been in touch with him to let him know about an honour he was receiving and to give credit to Dr. Novak for being such a positive influence on his educational practice.

Billy was a fellow elementary school principal at East Belfast Primary School in Belfast Northern Ireland. He was about to be honoured by Queen Elizabeth at Westminster with a Member of the Civil Division of the Most Excellent Order of the British Empire (MBE) for his ongoing contributions to education in Northern Ireland. “This honour may not mean much to you folks on the other side of the Atlantic,” Billy wrote, “but here in the UK, it has some standing.”
Billy had met Dr. Novak in the UK while Dr. Novak was lecturing at conferences put on by the University of Hull and the Regional Training Unit in Belfast. Billy had attended Dr. Novak’s lectures and connected immediately and deeply with invitational leadership as an approach to leadership grounded in theory that could make a significant impact on his practice at East Belfast Primary School.

Billy told Dr. Novak how inspired he was by his work and invitational leadership and how this led him to the re-modelling of East Belfast Primary to accommodate the principals of invitational education. He organized courses for the Regional Training Unit related to invitational education as a result of his meeting Dr. Novak and began piloting a course linking invitational education to a UNICEF and Rights Respecting Schools Project.

Billy recognized that the impact we make in the lives of students or colleagues is not always known to us as we move throughout our career so his note to Dr. Novak was one of acknowledgement and thanks for a life of educational work which inspired the refinement of his practice as a leader in order to lead invitationally. Dr. Novak introduced us via email and we quickly bonded over our shared Irish heritage, professional lives as principals of elementary schools, and common love of Irish rugby. Billy was being made a Member of the British Empire, which is one of the highest honours which can be bestowed on a British civilian.

**Member of the Order of the British Empire**

The United Kingdom has long held traditions and distinctions for citizens of the Commonwealth from royal titles such as Queen and Prince to titles of peerage such as Duke, Marquess, Earl, Viscount, and Baron. Citizens of the Commonwealth can also have titles, medals, and membership in orders bestowed upon them by the Queen for various reasons. There is the Honourable Order of the Bath, The Most Distinguished
Order of St. Michael and St. George, and the Distinguished Service Order for military service and civil service, the Order of Merit and the Order of the Companions of Honour for contributions to art, science, literature, and culture.

Perhaps the most famous of is the Member of the Order of the British Empire because the highest ranking of these members being the Knight Commander or Knight Grand Commander receive the title “Sir” for a male or “Dame” for a female and are formally to be referred to as such for the rest of their lives. Billy Tate was honoured by Queen Elizabeth at a service at Westminster and Buckingham Palace with a Member of the British Empire Medal in recognition of his significant contributions to education in Northern Ireland and his work toward inviting peace in the North through his inviting schools and cross-border relationships he cultivated between the Loyalist Protestant and Republican Catholic communities in the North of Ireland.

Being made a Member of the British Empire carries with it certain prestige, honour, and privilege. Members of high profile professions such as politicians, military officers, actors and musicians exist within the public spheres which may intensify the spotlight on their careers and accomplishments resulting in recognition such as an MBE. A primary school educator in Northern Ireland will not receive the same attention as other professions and it is because of this that Billy’s MBE is even more remarkable. His work was controversial but intentionally grounded in care, optimism, respect, trust, and he conducted his work with the intention of making Northern Ireland a more peaceful place.

Though the MBE may be regarded as the most prestigious of the honours Billy has been awarded throughout his career, it was, in fact, a culmination of many years of service and sacrifice in the name of inviting peace into schools and neighbourhoods throughout Northern Ireland. As the principal at a primary school in Aughnacloy, County
Tyrone before moving to East Belfast, Billy was awarded the Northern Standard & Bank of Ireland Special Millennium Award for Peace & Reconciliation. At East Belfast he was awarded The Allied Irish Band Better Ireland Community Award, and travelled to Strasbourg, Austria to receive the Marcel Rudloff Prix de la Tolérance Award. Accolades recognized Billy’s initiatives including the Commnenius Project & Dissolving Boundaries, the Aughnaloy & Ballygawley RTU Small Schools’ Research Project, Investor In People Award, and the Aughnacloy & Truagh European Studies Schools’ Project (Cross-Community & Cross Border) Peace 2 EU Programme. Billy took on challenges and invited others within the school and community to work on exciting projects which raised the profile of the school and students, while intentionally promoting peace and inviting understanding amongst Catholic and Protestant communities in Northern Ireland, the Republic of Ireland, and in mainland Europe.

Projects and initiatives which were challenging and immensely unpopular with some were the foundations of Billy’s intention to create inviting schools, inviting communities, and change the image of the nation from a war-ravaged to an inviting country.

**Wander**

As I grew as a school leader committed to leading invitationally, my experiences contributed to any developing confidence and competence. Connecting with Billy Tate in Belfast furthered my confidence as I came to understand how he was leading his school. While I appreciated emails and updates, I knew that I would need to get over to Northern Ireland to connect personally and experience his school and community.

**Inviting the Uninvitable**

Growing up in a humble working-class family in Portadown County Armagh, a troubled town known for sectarian strife, Billy Tate was raised in a working class
Protestant Unionist family. Education was valued tremendously by his family and Billy was encouraged to pursue academia despite being the youngest of eight children in his family. There was not much money but the family struggled and saved to allow Billy to attend school and that sacrifice instilled the value of education which remained with him for the rest of his life.

Having grown up in a Loyalist Protestant working class neighbourhood in a community which regularly experienced violence from both the IRA and Para-military groups, if Billy had become a Unionist and Loyalist sympathizer or advocate no one would have raised an eyebrow. In fact many of his friends did indeed become supporters of Unionist groups and he was expected to continue this tradition in the Loyalist neighbourhoods he taught in as a teacher and principal. Billy, however, had other ideas.

Billy understood that many of his generation had seen enough violence and bloodshed to permanently influence their perspective and the next generation had grown up indoctrinated by the previous. To make a change and move toward true healing and peace between communities Billy knew that it was important to teach children that long held opinions and hatred from previous generations need not necessarily persuade those of the future.

Though Billy worked within schools in the Loyalist community, he did not allow sectarian conversations and encouraged students to question their own and the beliefs of their parents. As a principal, he realized the potential to influence more than the students in his class but the entire school and community to evaluate and question long held beliefs and opinions.

Billy introduced initiatives within his school which were intended to connect communities and reach across political and religious divisions. Connecting with Catholic
schools in Northern Ireland as well as Catholic schools in the Republic became important as a way for students to engage with other students as children with more similarities than differences, free from the identifications of religion or the politics of their parents and grandparents. Students wrote to one another electronically and connected with common events and activities. Programs such as these were accepted, begrudgingly by some, as relatively benign. Children were introduced to one another from within the safety of their own schools, safe within the boundaries of their own community.

Gaelic games, traditions, and the Irish language are all considered Republican pursuits meant to celebrate the rich cultural heritage of Ireland. Under British rule, the Irish language was banned as was the playing of traditional Gaelic games such as hurling and Gaelic football. The result of this ban was that these pursuits became symbols of Irish resistance to British rule. The study and speaking of the Irish language, Irish dancing, and the playing of GAA games was considered an act of defiance to British rule and as such the games are more than games, the language is more than linguistic pursuit. As in many societies games divide along social and political divides. In South Africa, cricket and rugby have long been considered Afrikaans games and football a game largely played in the black community. In Northern Ireland, rugby and football are closely followed by Loyalists in the North while Gaelic games are considered favourites of Republican sympathizers. The championship trophy for the GAA games is called the Sam McGuire Cup, named after a Protestant who fought against British rule as an IRA rebel. While considered Republican, Billy recognized the significance of these pursuits to the common heritage of Ireland regardless of religious denomination or politics and introduced programs to the school which would be fun for the students and allow them to enjoy learning the language, playing the games, or dancing free from the sectarian
identities that had defined them. Students participated in extra-curricular Irish dancing programs which were enjoyed at assemblies and performances in the community. The initiative which generated the most publicity and stirred up the greatest controversy was the introduction of Irish Gaelic games at the traditionally Loyalist school at East Belfast Primary.

GAA players were invited into the school to work with the students on the fundamentals of both Gaelic football and hurling during gym classes and students were given the opportunity to play and compete amongst themselves as well as against other schools. Students learned how to kick and catch, score, defend, and have fun as they began to embrace the activities as games rather than political entities. Billy’s inviting approach to leadership and cross-community programs while not universally embraced within the housing estate was largely tolerated the introduction of GAA games became a divisive issue which sparked more than conversation.

While the majority of the community seemed to welcome the introduction of GAA games a vocal minority rallied against it. A website was established within the community to raise objection to the introduction of GAA games and to advocate for the removal of Billy Tate from the school. Public posts read “Fuck off and don’t even think about putting those Fenian games in our school you wanker and get out of our estate [sic]”, “Get the rebel loving scumbag out!”, and “All you’re doing is poisoning the minds of our children who aren’t old enough to make a decision for themselves. Why don’t you go and teach in a Catholic school where the glorification of Gaelic and IRA martyrs would be very much appreciated” (Retrieved from the Internet, 2010). Despite the vocal opposition Billy remained committed to having the games at East Belfast Primary and welcomed the debate that ensued. He knew that if he challenged long accepted
sectarianism that it would not be accepted by all. However, when threats are made by certain groups who have a history of following through on them, concern is legitimate, yet Billy persevered. Thinking beyond the East Belfast community Billy sought opportunities to invite others to question their beliefs and biases by sharing inviting initiatives publicly.

Billy and I had been communicating electronically about what was happening at each of our schools. I was struggling with the implementation of a new policy at school that involved the re-organization of the lunch schedule when I received a note from Billy about the introduction of hurling at East Belfast Primary. He wrote it for the Belfast Telegraph newspaper as a contribution to the One Small Step Campaign, a Northern Irish initiative for equity, respect, diversity and recognition of the interdependence of all. As I read Billy’s contribution to the One Small Step Campaign my lunch time re-organization was put into perspective.

I want to see a healing of the communities in Belfast and for my children to experience life to the full. I teach mutual understanding to promote tolerance and trust in the local and wider community. That requires us to engage in developing learners in practical activities that value and celebrate cultural differences and diversity. Too often cross-community activities are safe ones for principals, where we follow the lines of least resistance.

When a class of senior pupils asked me to introduce hurling to the school I was flabbergasted because, momentarily, my old prejudices returned. On reflection, the real issue was that I knew this request would create difficulties for me as a principal. The road less travelled is always lonely and full of pot holes. This should not deter us, as leaders and followers, because it takes us to a place
where we will find true reconciliation. Children are already on this road looking back at my generation who are contemplating the potential journey ahead.

When the parental consent slips came back into school I was so proud to see the collective generosity of spirit. All the children were allowed to participate in the hurling tournament. Rugby has been able to accommodate both the Gael and the Planter with their unique traditions. That is what we hope to achieve by reaching out the hand of friendship to everyone. We want to share our culture with others and to learn about new ones both here and abroad. (Tate, 2009)

Despite the consent of many parents within East Belfast Primary the vocal minority, backed by local paramilitary groups, opposed any introduction of Gaelic games at the school. When Billy arrived at school one morning he found paramilitary flags hanging on lampposts around the school and community signaling the disapproval of the paramilitary groups to the introduction of GAA games at the school. The media were informed and Billy was faced with reporters wanting to know more. Despite his attempts to diffuse opposition the media reported the unrest in the South Belfast News on the 19th of November 2008 in an article by Alana Fearon entitled “Gaelic Games Not Welcome At School”:

Messages on a website set up to oppose the introduction of the sports by the principal William Tate, accuses the teacher of “poisoning children's minds,” and calls for the headmaster to bring his “glorification of Gaelic and IRA martyrs to a Catholic school.”

A local community representative told the South Belfast News that he believed the majority of people did not want Gaelic games in the area as it “is and always has been a loyalist estate.”
However Mr Tate, who has brought Gaelic sportsmen into the mainly Protestant school as part of the classes, played down the comments, blaming any criticism on a “core group opposed to change.”

“We’ve had Gaelic footballers in, the children loved it and there was no real bother,” said Mr Tate.

Barry Wilson from the Community Association said GAA games at the school had upset a lot of people in the staunchly loyalist estate.

“East Belfast is and always has been a loyalist estate and the majority of people do not want Gaelic games here,” he said. “A lot of parents have withdrawn their consent and Gaelic practice has been moved to the rear of the school, such is the extent of the ill-feeling.”

A website, which Mr Wilson says was set up by family members of children at the school, calls for an end to “sports governed by the IRA” being forced upon schoolchildren without parents’ consent and asks, “Do you want the children having to salute the Irish Tricolour while listening to the Soldiers’ Song? If you let hurling into East Belfast Primary School this is where it will lead.”

(Fearon, 2008)

For Billy the introduction of Irish games at his school was more than an athletic endeavor. It was an imaginative act of hope that the future for the children of East Belfast Primary and indeed all children of Northern Ireland could be free from traditional biases and hatred. A Catholic principal introducing GAA in a Catholic school would not have registered a blip on the Northern Irish radar, but a Loyalist principal in a Protestant housing estate doing so sparked debate and challenged existing prejudices.

I received an email from Billy shortly after the article was published.
“This is a snapshot of what I have to face but I know I will win through because of the letters of support and personal contacts with parents who want change,” he said.

Billy did not see himself as a lone crusader imposing his will on the community but rather a leader who was courageous enough to stand up for the silent majority who were unwilling to say so publicly because of fear but openly wanted change for the sake of their children and the peace process.

“In the press comment below Mr Wilson has a shady past. He is a parent at school and is annoyed because he is fundamentally sectarian and hates me for trying to change things,” Billy wrote to me.

A principal could have arrived at East Belfast Primary and been welcome and accepted for keeping things the way they had always been, but Billy was not as interested in acceptance as he was in inviting others to challenge their own convictions and long held belief system. He felt he had been called to advocate for children and to help to provide them with the greatest opportunity to succeed in life whether in Belfast or beyond. To invite change he sought out ways to invite communities to live and work together and to erode generations of hatred with each new group of students.

As I read his emails from my office at St. Stephen’s elementary I reflected on my tenure to date, my decisions and policy implementations. Billy appeared to be decisive in his convictions and willing to see ideas through as long as they were good for children. I committed to doing the same but recognized the part of me that wants to be accepted by the community. I began to understand that doing so did not mean conforming to the norm and doing things the way they had always been done. Billy’s courage to take on the implementation of a program which guaranteed controversy and opposition because he
thought it was the right thing to do for children forced me to re-evaluate my decision making.

The media reporting, while intended to undermine the initiatives of Billy within the community, instead brought attention to his leadership as an educator committed to creating an inviting school and dissolving boundaries between communities. His willingness to undertake controversial initiatives and to celebrate them publicly to encourage conversation and re-thinking of existing norms began to garner attention both in Northern Ireland and in the Republic. It was not long before the President of the Republic of Ireland, Mary McAleese and her husband Martin, former Mister of Education for the Republic, recognized the work Billy was doing at East Belfast Primary.

**A Visit From the President**

As a teacher and principal Billy had been involved with cross-border educational initiatives throughout his career and began to be recognized as an educator committed to dissolving boundaries. He had sat on cross-border committees with the Taoiseach (Prime Minister of Ireland) and provided a voice from the Loyalist communities on projects and initiatives intended to promote connections between the North and South.

By the time he arrived at East Belfast Primary as the principal his work was known in Belfast as well as in Dublin. He had met and worked with Martin McAleese, the former Minister of Education for the Republic on committees and his wife Mary; the President of Ireland. Martin McAleese was also an integral negotiator between militant groups such as the IRA and UDA, UVF and paramilitaries in the North during the decommissioning of weapons process.

On Monday October 12, 2009, the sitting President of Ireland Mary McAleese and her husband Martin visited East Belfast Primary School in recognition of the on-going
cross-community initiatives Billy was implementing in the traditionally loyalist housing estate. From hurling to traditional Irish dancing and participation in the Dissolving Borders project, East Belfast Primary welcomed the official head of state of the Republic of Ireland who celebrated and encouraged the inviting leadership of Billy Tate and the students of East Belfast.

As a new school leader I had appreciated Billy’s willingness to correspond with me as I struggled with both the big picture of school leadership and the everyday details of day to day leadership while he was entertaining a head of state at his school and receiving honours from the Queen at Westminster. At first it seemed too fantastic and far-fetched to have any implications on my leadership. I had privately debated whether or not to remove the principal’s reserved parking sign; I was not accepting invitations for tea with our Prime Minister or Governor General. I realized, however, that despite the national and international recognition of his leadership the principles remained simple enough for a new principal such as myself to follow: lead from a truly caring core, trust others to do good things when given the opportunity, respect everyone, even those who do not share your point of view, be hopeful and optimistic that a better future is possible, and do it all intentionally. Experience, reflect, refine and repeat. I might never receive an invitation to host the Prime Minister or have the Order of Canada bestowed upon me but I could do all of the above.

**Mentorship From Across the Atlantic**

Billy and I began communicating about what was happening at St. Stephen’s elementary and East Belfast Primary. We both followed rugby and connected after each Irish game, particularly victories, about the play of the team and individual players.
As educational leaders, Billy and I quickly found out how similar our approaches to leadership were as leaders intentionally leading invitationaly. I recognized an experienced educational leader committed to children and working optimistically toward a better future within a difficult community. He regarded me as a young inviting leader committed to finding out more about educational leadership and invitational theory in practice. I was eager to learn from his vast experiences and he readily offered opinions and encouraged me to do the same with him. Though a mentoring relationship was forming, I felt his respect from across the Atlantic in his words and ideas which encouraged me to pursue invitational leadership. It was a pleasure to connect with a like-minded elementary school principal who was committed to living and practicing within an idea, reflecting on practice, and intentionally creating an inviting school. However, as similar as our approaches to leadership appeared to be, the differences between our communities could not have been starker.

St. Stephen’s elementary is located in an affluent suburb in Southern Ontario. The pressure to remain consistently amongst the top schools in the province is a reality as are the high expectations by the parent community, staff, and students. In contrast East Belfast Primary is located in a traditionally Loyalist housing estate in East Belfast Northern Ireland and populated with the children of lower to lower working class Protestant families. The community is steeped in Loyalist traditions and influenced by paramilitary Loyalist organizations committed to fighting to remain part of the United Kingdom, the IRA, and Republican ideals. Both children and parents in the East Belfast Primary community have been affected by The Troubles which have plagued Northern Ireland and Belfast particularly. As a country divided by political history and ambitions and identified by religious affiliation and heritage, East Belfast Primary exists within an
insular Loyalist pocket of East Belfast which has remained fiercely Unionist and suspicious of Republicans, Catholics, and the peace process.

Billy and I communicated via email about the Ministry of Education’s visit to St. Stephen’s and the immense pride we felt as we shared our inviting culture with the Ministry. It was so gratifying to highlight the culture of positivity and collegiality which had developed since the introduction of invitational education and the student success.

Billy similarly shared stories of success at East Belfast Primary. The school was considered to be a failing school by the Ministry of Education as recently as 2004, but by the time we began to correspond in 2008, it was receiving numerous accolades. Robson Davison, Deputy Permanent Secretary for the Department of Education of Northern Ireland, wrote in a report on East Belfast Primary for NAHT magazine that:

The principal, a teaching principal by choice, leads the school and balances a varied set of demands across each day and week by a combination of good planning and responsiveness. He has clear goals for the school formed on a strong theoretical and practical basis, and an appropriate plan for achieving them. He recognizes the value of working with the staff, the governors and the wider community in pursuit of changes that are in the interests of the school and its pupils. He is accessible, and thoughtful and perceptive about the problems he faces. (Davidson, 2008)

The report also highlighted the importance of leadership within the community of East Belfast Primary and the way in which Billy addresses the unique community:

I am more aware of the importance of links between school and the community it serves. The principal gives considerable time and thought to how better the school can provide a service to the people of the estate, whether through the youth
provision, the better use of the school buildings and grounds and co-operation with community organizations. He sees the benefits as being two-way. (Davidson, 2008)

While both our schools’ present uniquely different challenges, we recognized the importance of community engagement and support in the creation and fostering of a positive educational community. The challenges Billy faced every day in East Belfast made concerns at St. Stephen’s seem minor in comparison. I was never threatened by a parent or member of the community and even if I were, the threat would not carry the same consequence as the loyalist paramilitary members of his community who threatened him with physical harm on numerous occasions. The worst I might have to deal with is an upset parent. Billy had worked in a school community in which all staff had to check under their cards for bombs each evening before leaving the parking lot.

The political, historical, religious, and cultural divide in East Belfast provides enormous daily challenges. Generations of hatred, violence, and mistrust saturate the East Belfast community as a fiercely guarded Loyalist enclave. Paramilitary groups dominate local politics and influence policy in and around East Belfast Primary. The threats Billy received by both groups and individuals attempted to intimate him into the maintenance of the status quo rather than the direction Billy wanted to take the school and community as an inviting school.

Invitational leadership made a significant impact on my leadership as an emerging school principal at St. Stephen’s in Southern Ontario. Billy embraced invitational leadership at a different point in his career, as an experienced principal, who was reflective on practice and receptive to the influence of theory. At a causal glance, any success at St. Stephen’s seemed simple in comparison to the influence of invitational
leadership at East Belfast. The social and political divide appeared too enormous to overcome simply by committing to inviting leadership and the creation of an inviting school. For Billy, however, this theory of practice changed his approach to education and subsequently changed a community that no one thought could be changed.

As Billy and I wrote to one another we talked about visiting each other’s schools to be able to witness firsthand what we had been conversing about electronically for years.

**Courage, Education, and Peace**

My wife was born in Belfast and my family is from the south of Ireland. I am deeply interested in peace and reconciliation in Northern Ireland. Peace has long been a goal and for decades it has been beyond reach. The Good Friday Agreement and the current power sharing government in Northern Ireland is the first to attempt to move forward cooperatively and free from violence as official policy. Though splinter groups on both sides of the divide still engage in violence, the vast majority of people in the North are interested in moving beyond traditional hatred and toward a lasting peace.

As a new principal, I wondered if I was indeed naïve and still too green to appreciate school leadership for what it really was. I looked forward to Monday mornings and couldn’t wait to see the students and staff every day. I found most parents to be delightful and supportive of the school and our educational and community goals. Conflicts were resolved with respect and trust and the school was a positive place to be. Situations arose, as they always do, but our perspective invited collaboration, trust, respect, and optimism. I enjoyed being out on yard duty, getting know staff personally and professionally, and connecting with parents as we worked together to create an inviting school. I kept wondering when my naivety would come crashing down and I would regret not keeping parents at a distance and trusting the professionalism of the
wonderful staff. The day never came. I wondered why more principals were not embracing an invitational perspective or at least one which focused on the positive aspects of school leadership and the immense privilege we have as educators to work with children.

Connecting with Billy was a professional revelation for me. Not only was his approach to leadership full of care, hope, optimism, and respect, but he appeared to do so intentionally as a thoughtful practitioner committed to reflecting on his experiences and refining practice. He was intentional about his decisions and understood the ramifications and the difficulties he would encounter when he made them. He continued to intentionally engage in imaginative acts of hope for the betterment of his school, staff, students, and the wider community. The unique social and political situation in Belfast made the creation of an inviting school difficult. In a community used to segregation and the perpetuation of old hatred, Billy knew that his inviting policies and programs would ignite derision within the community and even amongst staff yet he continued to do so. Recognition by the government of the Republic of Ireland, awards in Northern Ireland and Europe, and his Member of the British Empire served not as personal accolades but as testaments to the possibilities created by inviting leadership. Leading invitationally and creating an inviting school was not only possible but it was celebrated. If it was possible in East Belfast, it was possible at St. Stephen’s.

I wanted to know more about Billy’s leadership and East Belfast Primary. My inbox compiled saved conversations with Billy about our two schools but I wanted to experience more than electronic communication. I had to go to Belfast to see for myself.
Eternal Optimism and Impending Doom

I wrote to Billy and asked if I could come to visit him at East Belfast. My Irish family roots and those of my Northern Irish wife provided a basic understanding of the political and social pressures but a basic understanding and appreciation was not what I was after. An inviting, optimistic, hopeful approach to leadership appeared to be relatively uncommon in my own experience, I imagined it must be even more so in a staunchly loyalist housing estate in East Belfast. Remaining positive in such a unique political and social context required courage, commitment, and confidence. I hoped to develop all three in my leadership.

As the fall progressed we continued to correspond about life at East Belfast and St. Stephen’s, highlighted by the President of Ireland’s visit in October. I was excited to visit in the early spring and we went into the Christmas break sharing well wishes for the holiday season with friends and family.

I received a note from Billy in early January.

“My doctor phoned me today and confirmed that I have cancer and my outlook is not good,” he said. “I am so sorry this will foul up your plans. My focus will be on my family. I am sure you understand.”

I stared at the message on my computer and thought about his family and the staff and students of East Belfast Primary.

“My thoughts and prayers are with you and your family,” was all I could muster in response.

I was deeply saddened by for Billy and his family but also for educational leadership. Billy was an exceptional example of an inviting educational leader living and leading within arguably one of the most uninviting communities imaginable. His
contribution not only to education and educational leadership but to peace and reconciliation in Northern Ireland was enormous. My visit became even more important as I realized that it would be more than simply a journey in support of my personal leadership development but instead take on a more significant meaning.

I received another note from Billy days later.

“Just back from the doctor and the cancer is all through me,” he wrote. “My wife is very emotional but God has been good to me and I have enjoyed life.”

I reconsidered whether or not to make the trip given his situation. I did not want to descend upon his home and family during a difficult time for all of them yet I wanted to tell his story outside of Northern Ireland. Instead of deterring me from visiting, Billy’s medical news strengthened my resolve to visit and find out more about his leadership and East Belfast Primary. His story had to be told.

We remained in contact throughout January and February. Billy remained optimistic about the impending end of his life and seemed at peace with his legacy and contribution to education. His condition deteriorated with each passing week until he could no longer physically go into the school. Two weeks before I arrived he had made the journey into East Belfast but found it to be too much for him. He had not been back since, and feared he had made his last trip to the school. By the time I arrived in Northern Ireland he had not left his bed in over a week.

**Inviting Leadership From a Belfast Bedroom**

Billy provided directions, carefully highlighting each landmark along the way and warning me about a dangerous bend in the road close to his house. We chose a time the next morning to meet and I eagerly anticipated the opportunity to speak face to face.
I made my way toward Billy’s home outside Belfast. I took careful note of the landmarks he had pointed out and took care around the dangerous bend, silently agreeing that it would have been treacherous without his prior warning. I found his home and rolled into the pebbled driveway and parked beside the house.

His daughter appeared along the side of the house as I climbed out of the rental car. She introduced herself with an extended hand. I thanked her for meeting me and commented on the beautiful drive through the countryside. Her puffy red eyes betrayed the fact that she had been crying moments before my arrival. My comments about the beauty of the area were an attempt to lighten the mood. It was either that or the weather. As I followed her toward the front door I couldn’t help but feel like I was intruding during a difficult time. She offered to take my coat and asked if I had any trouble finding the place.

“It’s a dangerous bend down the road,” she said. “I hope dad warned you.”

She offered a cup of tea or anything to eat. I declined. She smiled and motioned down the hallway.

“This way,” she said. “I’m afraid he’s not moving around much these days.”

We walked down the hall to the last door on the right. She opened the door and invited me to walk past her.

Billy was lying in his bed under the covers. He propped himself up onto his side, smiled widely, and extended his hand.

“Don’t mind me in this bed,” he said. “I don’t get out much anymore.”

He adjusted himself slowly, shifting his weight to one side so he could face me as he offered me the chair beside the bed. I thanked him and sat down.
As a rugby man Billy had cut a large silhouette in the best of health but as the cancer was throughout his entire body, and his stomach particularly, his body was bloated to the point where subtle movements were arduous.

We had agreed to talk about education, his leadership journey, and East Belfast Primary, but our conversation immediately started at the beginning, just like all good stories should.

**A Northern Sectarian Town**

“‘I’m from Portadown originally,’” he said. “‘My mother’s family would have been from the south originally. Cavan. The railway was a defining factor then. A lot of people worked in the railway. Her father was a regular soldier. My grandfather’s family, they had done the tours, Boer Wars. Just jobs you know? When they came back to settle in Ireland the border was a problem then. They were shooting anybody who had connections to the area. Anyone with connections to the army so they had to come up to the Monahan area. They had to come up north and they settled in Portadown.”

Army soldiers were regarded as traitors to the fight for independence in the south of Ireland so a move north was one of necessity for safety and security.

“I grew up in Portadown,” he said. “World famous for sectarianism I suppose.”

**The Invitational Mr. Woodman**

Communities were kept separate and distinct as tensions and hatred simmered unchecked within each. Billy immediately spoke about the influence of school on his life as a student and the impact of the leader of the school on his life.

“‘Strangely enough when I went to school Mr. Woodman was the principal of the grammar school. He was High Church. Church of Ireland Protestant which was really similar to Catholic but he was very liberal and he inculcated with a very broad liberal
look on life. He was a tremendous wee man. So we were probably brought up in a minor public school type atmosphere in a working class town which was kind of a strange juxtaposition of where the town was and what was happening politically in those early years in 1971/72. I was 18 when things started to go crazy.”

Billy reached across to the night stand beside the bed and picked up a plastic cup of water and drinking straw, took a sip, and gently placed it back again.

“The first guy was shot in the town on July 11, 1972. Everyone was going to see the bonfire and somehow this guy got himself shot and the town went crazy so it divided very, very quickly and it remained so.”

Talking about someone being shot came as easily and casually as sipping from the plastic cup. It was the reality of life in Northern Ireland during The Troubles.

“In those early years you either went into a paramilitary group or you stayed clear of them. My father kept us clear. A lot of other fellas were in jail for twenty or thirty years for a range of offences. A lot of them did well for themselves. When they went in, they failed their 11 plus school exams from the wee streets they lived in but when they got into jail they turned themselves around. I was talking to one recently. He had double firsts in math and physics which is not easy to get. He would work for prisoners’ aid groups up on the Shankill Road. So it’s sort of amusing to have contacts of people in your areas and it helps to learn to get on with people. That’s where Mr. Woodman was good. He did a lot of cross-community functions.”

Billy recognized the immense impact his old school principal had on him as a young man in a troubled town. The lure of paramilitary groups at the time would have been tremendous as the community divided between Catholics and Protestants. Your last name or the school you attended to decide to which group you would belong and
connecting with paramilitary groups might further create a sense of belonging and safety within each community. Billy’s school principal lived above these distinctions and challenged his students to do the same, influencing Billy for the rest of his life as he in turn attempted to do for his students.

“You ask anyone who went to the school,” he said between sips of water. “When you went along the first thing you had to do was community service. Mine was working with people with multiple sclerosis. You worked with people who had cancer. All sorts of different groups. The school was completely open. Everyone was in an out of it. Mormons, Church of Latter Day Saints would come down to play basketball. Some of the regiments would come down as their station was not too far away. The churches would every year. Just ask anyone in Portadown. Mr. Woodman, he was the man,” he smiled. John sat up higher on the bed smiling from memory, as if excited by the thought of his old principal.

“A very small man and eccentric. Totally eccentric. If you talked to him about leadership he wouldn’t have a clue what you’d be talking about. No notion of it at all. But if you put him in a crowd and all of a sudden you have a hundred people around him.”

“He had charisma?” I asked.

“Absolutely,” Billy said. “He had you listen to the radio. He put a theatre into the school which was unique then and on a Monday morning you had to go in having listened to the news and defend a position. You might be given a position you might not necessarily agree with. He just pushed your boundaries. He loved every child and at that time there were about a thousand students and by the first of September he knew every name.”

Billy continued, beaming, as he recalled his old school principal from over 40 years early in vivid detail, giving credit to the man for making such an impact on so many
young lives.

“He was a phenomenal man now. He got a British Empire Medal. He was in the navy during the war. He was really the most forgiving man. I never heard him criticize anyone from another sect or another way of doing things. Just such a tremendous wee man,” he said.

“You were very influenced by him,” I said. I have a knack for stating the obvious.

“Oh everybody was,” he said as he reached toward the nightstand again and placed his water down. He moved some books around until he found the one he was looking for. He handed me the book, telling me that it was written by a classmate of his from the days of Mr. Woodman.

“Someone sent me that the other day,” he said. He pointed to the inscription on the inside cover.

“It’s from Kathryn. It says ‘For all the days gone by at Portadown College’. We all stayed close from that year. He always told us we had a special year. They’ve all done some tremendous things in their own ways. Pushed the board out in many ways. You can see his influence and you can hear it,” John said, referring again to the book in my hands.

I quickly leafed through the book while Billy reached for his water again.

“When you went to the school he never called anyone by their surname which was really unusual by the teaching standard then.”

**Inviting Mentorship**

“Then I left school and went to college and went to the first school that I taught in. It was like moving from Sodom to Gomorrah. It was terrible. The principal was the
most disorganized, chaotic. It was an awful school. There was nothing you could have said you’d have picked up from the place,” he said.

“Then when I moved out to my next school Dan Jones was a very good principal. Very affable man. He’d gone to Portadown College as well. He rocked me one day. We were sitting talking in the staffroom one day about Mr. Woodman and he told me that he hated him. I couldn’t believe it. I was devastated. He said ‘You got him in his grandfather years and we got him in his father years when he was trying to cut his teeth at the school and the stick would have been in a lot then.’ I just couldn’t believe it.”

“I suppose that’s an example of someone reflecting on his leadership and using his experiences to help improve,” I said. Billy continued to talk about his evolving career path.

“I got into curriculum development in the second week of teaching. I was in a bar at Stranmillis College. This lecturer came in who I had in college. He said ‘What are you doing here?’ and I said I’m just down for a wee pint. He says ‘Do you fancy doing a wee project I’m doing with schools in practical maths?’ Nathan was charismatic, also off his head in the most engaging way. Very creative. He was a painter. Also very into Ulster Scots before Ulster Scots was a big thing. He came from the north of the country. It used to be that if you spoke Ulster Scots you got your hand beaten because you can’t talk like that. You learn the received English. So he did a lot of work with putting speech into writing, you know teaching children how to accommodate whatever their accent was and how to work with it. Here we are 20 years on and it’s highly treasured now, your local accent. Again, there were people at college I could have said were most inspirational. I think there’s always something slightly eccentric about someone who has an inviting attitude about things who is prepared to work out ‘does that really matter? Let
that go.’ And I think that’s the problem with a lot of people try to go in to win all the
fights and you can’t do that. Never do that. I think it’s good that you reflect back that
way.”

I nod in agreement, thinking about the term I use when considering a situation: “Is
it the hill you’re prepared to die on?” Leadership should involve compromise and
consensus while recognizing certain situations require a strong stance and putting a stake
in the ground. Reflective, inviting leadership requires understanding when to
compromise and when something is worth fighting for. As he sipped more water, Billy
reflected on his career and the influences that contributed to his teaching career.

“I would say that half my career wasn’t that great and the other half was
fantastic,” he said.

“Why would you say it wasn’t that great?” I asked.

“I think in the first few years of teaching I maybe had two role models in the
school. One became a very high senior inspector. We were quite friendly. The other
was a Phys Ed master. He was a good teacher. But that was about it. Some of them
hated children. That was the only way. They came out of the war and what do you do
but get a better job. It was an easy route, teaching, for some people. There was a lot of
the staff where it was a second job. Easy cash. Then there were a lot of good
appointments made and they started to change things dramatically and then the unions got
involved in the school. Broke its’ back. I don’t know how many people you had to cane
every week,” he said, shuddering at the thought of corporal punishment for students.

The idea of hitting a student was foreign to me though I know the practice was
common just before my time as a student. Given my impression of Billy’s teaching and
leadership style and his connection with students I was curious about how he reconciled that with the responsibilities and expectations of a teacher at that time.

“Did you ever have to do that?” I asked.

“You had to,” he said. “It was given to you. You were given tasks you had to do and you’d have been told what to do. At that stage we had very tough children in that they were from the army camp—the Royal Highland Fusiliers—north of Scotland. The Sergeant Major said to me ‘They weren’t going to take me into the regiment’ and I said ‘why?’ and he said ‘My criminal record wasn’t bad enough.’ He was serious. We started taking the children away on camping trips, skiing, canoeing, weekends, and we started to get to know them better and then they stopped the stick. Then only the principal gave the cane. I remember when I was at Armagh Secondary. You could have got the cane for murder or you could have gotten it for forgetting your tie. I remember saying to the principal ‘Dan, every day you go down there and you wack away at Tommy Tucker and the boys and every morning they’re back. Does that not tell you something?’ I said. And he says ‘I know it’s depressing, but staff send them down and you’ve got to do something about it.’ And then we got a directive in that said no more stick. It was the best thing that happened because it started people’s brains working. We started working on pastoral care.”

I could see Billy’s discomfort talking about the stick as if ashamed of the fact that they all participated in something they knew was not good for children but did so because it was expected of them. The idea of mentoring to children perked his spirit up considerably as he recounted the early days of this new approach.

“In the early days, pastoral care was a way to mentor teachers away from the cane more than it was for pupils,” he said. “We had some very good staff, absolutely brilliant staff, and they started to come to the fore during that time. There was an English lady,
Andrea Newsome, and they live in Dungannon and she was a fantastic woman. She was so child-centered it was unbelievable. She was quite small. I remember that if someone said something nasty to the children in her care she’d run up the stairs at break time and say ‘Don’t you ever say anything like that to one of my children again.’ We set up this system, a home system with pupils that nobody wanted, twenty five pupils I think it was, and we took them for every subject for the first year to settle them into school. It was very successful now and it worked really well and then Mrs. Thatcher came in and said ‘no more of that, get their heads down into the books.’

**Checking Under the Car**

“It was good for the children at the time because there were a lot of problems in Armagh, it must have been blown up about five or six times because we were beside the courthouse,” he said.

Billy spoke very plainly about bombs going off around the school so it took me a moment to register what he was saying. It seemed to roll from his mouth in such a calm, matter of fact manner that I had to interrupt to be sure I had actually heard what I thought I heard. Did he just say that the school had been bombed five or six times?

“So,” I stumbled to clarify, “…bombs went off that close to the school?”

He nodded and furled his eyebrows as if to say “of course”. The reality of teaching in Northern Ireland had made the extraordinary seem normal as he shared experiences from teaching at that school.

“One of the teacher’s husbands was shot in the car park of that school,” he said.

“The Provos went out and shot and wounded him. A lot of the staff had army connections so they had to be very careful all the time. They had to look under the wheel arches where things are left,” he said, referring to the ever present fear of a car bomb.
The army was seen by many in Northern Ireland, especially within the Republican communities as an occupying force. Local men who joined the army were targets as were soldiers from England and Scotland who were stationed there. Their families lived in constant fear of violence.

“At that point the schools were fairly segregated?” I asked.

“At that point there were some Catholic children there but they were mostly the children of policeman or soldiers. I remember there was one man now. He was a very senior prison governor. He was Catholic but he decided to send his children to our school because he wouldn’t have been welcome at the Catholic school as a prison governor. They waited for him coming out of St. Patrick’s Cathedral after mass and shot him dead on the steps of the Cathedral. There was no safety arrangement. No places anybody felt safe.”

I understood our contexts were vastly different from St. Stephen’s elementary in suburban southern Ontario to a Loyalist housing estate in East Belfast and that what was so compelling about our connection to inviting leadership. An invitational approach was making an impact on my leadership as a school principal as it was on Billy’s in East Belfast. The way in which he shared stories about his schools seemed very normal within his context. Violence was real and personal safety was an on-going legitimate concern. Safety seemed to exist within the confines of homogeneous groups which perpetuated sectarianism. To step outside the group and engage the other side or to do or say anything against them was risking the life of yourself and those you love. Standing up to them was not an option. They had too many ways to intimidate back into submission. In my context taking a risk meant potential humiliation, a bruised ego, or personal conflict. For Billy, a risk might bring with it the threat of physical harm from those used to
carrying out threats. I sat back in my chair and listened as he recounted another story of courage from a colleague.

“One of the teachers, she was a lovely girl, was sitting have tea one night at home. Two boys opened up with AK47s and they killed her husband. Strange things you remember now because the freezer was punctured,” he said, staring blankly as if the scene was playing out again right in front of us. “I remember going up to the house and the technology teacher was there. We were looking through and the AKs, there’s a fair kick in them now,” he said to me as an aside, correctly assuming I had limited knowledge of the intricacies of an AK47 assault rifle.

“They went through him,” he said. “Through him, the freezer, through the wall of the garage and peppered their wee car in the garage. I remember she just got up and said “I forgive these people.”

I simply shook my head.

“She was unbelievable. She was a treasure. An absolute treasure. A very pleasant lady. A lovely personality,” he said.

An image was created in my mind as he told the story. I imagined what her house looked like, how her kitchen was arranged and how the tea was laid out on the table. I saw the men enter and heard the crack of the AK47s and her screams as her husband fell in front of her. I pictured the holes in the freezer and what the bullets had done to their car. The idea of forgiveness would not have been on my mind. If she could forgive in a situation such as that, there is nothing that cannot be accomplished. Billy watched her go on to do wonderful things for children, contribute positively to the community, and committed to reflecting on her courage when times got tough.

“I can’t imagine…” I said. It was all I could think of.
Who Will Lead Us Through It All?

“There were a lot of Christian people, and I mean that in the broad sense,” he said.

“There were some tremendous staff. It was struggling to come to terms. It was going through change. Those were tough years now. Politically there were a lot of problems going on. In every school I’ve been you could pick people out, even in the schools I attended. The primary school I attended; the principal there was a good man. He’s in his 80s now. Affable man. I would describe him as affable. I think somebody needs to have a bit of a sense of humour and not take themselves too seriously. I think a lot of time as a younger teacher you get confused about your status in the school and then at some point you think it doesn’t really matter then children accept you for what you are. I think once you start putting it to one side it helps a great deal.”

As I listened I reflected on my first year as a principal and how I felt it necessary to “play the role” as if a principal is a character in a play. I bought suits, got my haircut a certain way, and tried to appear authoritative. I realize now that it doesn’t matter as Billy suggested. As I reflect on my years as a principal, I recognize that the more comfortable I became with “me”, the more confident and comfortable I became as a leader.

“I have a laugh in school. I wear a wooly pully all the time,” Billy said, referring to woolen pull over sweaters.

“I start the week with one tie and as the week would go on there’d be five ties in the window. I’m not very formal. I remember Ivan the VP. He was a very dapper man. A great fellow. Great fellow. A brilliant teacher. He would play the lute for the children. Loved classical music. Even the most difficult children he would win them around. He never raised his voice and treated the children with respect and the children respected him.”
“He was your vice principal at East Belfast?” I asked.

“At East Belfast,” he confirmed. “He retired two years ago. There was something really special about him, a little eccentric. He would say there was something of Autism in him. You know the spectrum that everyone is on in some way? Well Ivan was on in a good way. Very witty. He always saw the funny side in things. Someone would put forward a very pretentious argument at some point and Ivan would burst out laughing halfway through it. He had that way to diffuse any argument coming. There was just something very good about him. A very generous man. Gave very freely of his time. When I came to East Belfast at first the thing I found hard was I just say staff. I don’t define between roles. There were classroom assistants there who knew they were classroom assistants. We don’t have to rely on some silly extraneous thing to get credibility with people. It will never work. We started to give them responsibility and they took off with it like nobody’s business and it took a wee while and then younger members of staff, you’re nearly need to be there thirty years before anybody would listen to you. You’d go into the staff room and nobody said anything.”

Billy’s inviting leadership style within the school was evidenced by the invitation of all staff to be part of the creation of an inviting school that supports children. By inviting classroom assistants to take on more responsibility and work collaboratively with teachers more ideas could come to the table. I decided to ask about the silence in the staffroom.

“Nobody said anything?” I asked.

“Not a word,” he said. “The culture had sort of developed where the boss of the school made the decisions and that was it.”
“That seems like a difficult situation to inherit,” I offered, thinking back to my transition into the role.

“Ivan didn’t want the job of principal because there had been half-dozen paramilitary families who had broken his spirit,” he said with a sigh. “They just saw a cultured man as being soft. He just didn’t want the job. So the first two months at the school were tough going. The very beginning not one of the staff spoke to me. No one.”

“Did they not speak to the old principal too?” I asked. “Or was it just because you were new?”

“Just because I was new,” he said. “To be fair to some of them last year they came to me and apologized. But there were two or three people. I had a fairly good reputation in teaching from Aughnacloy that we’d achieved things that nobody had ever tried before in cross-cultural or community work.”

Billy’s work as the Principal at Aughnacloy Primary School was recognized as leading the way in cross-border relationships and it was from Aughnacloy School that he was awarded the Prix de la Tolerance award in Strasbourg and the Special Millennium Award for Peace and Reconciliation. His reputation for pushing boundaries toward inviting communities to come together had preceded him and his staff worried about him rocking the boat in East Belfast.

“At Aughnacloyin we had set up a cross border project and I had to set up a dummy company to run it. The Catholic Church were not too pleased with it. You know; Protestants working or being in their school. I had to get a friend who was an accountant to make it work. So the money would get paid to there and paid to there and paid to there so the money for the project wouldn’t be coming directly from the Prods you know?” he said with a laugh.
“The Northern Irish government is supportive of these initiatives now. Were they not at the time?” I asked.

“They’re not even that supportive of them now. There’s an administrative thing that’s doing on at the moment that says all children should be integrated. But most people pay lip service to it. But I’ve argued for a while it’s not a school thing, it’s a housing thing. There’s not a Catholic person who lives here,” he said referring to the East Belfast housing estate. “Two miles up the road there’s a chapel so no Protestants live there. So what you get is people clustered. You go to buy a plot of land and everyone asks you what school you went to in order to establish exactly what you are. There’s mixed housings that keep it where people play together and there’s a wee bit of contact between families. You’re starting to find that those who have been involved in paramilitary families a lot of them send their children to integrated schools.”

“Paramilitary families send their children to integrated schools?” I asked.

“On the loyalist side you wouldn’t find because of the Holy Communion. If you set up an integrated school the way they would have done it they wouldn’t have let the children have communion so it was hard to organize. Now it’s a wee bit more open, but it’s still a fact of life. The agreement they’ve come to is there are children who are Catholic and Protestant and they agreed to build new schools on new sites but two schools. The Prods go into one and the Catholics into another. So you have to read into the nuances there. Society is not ready. It’s just not ready at the moment to take the big steps because they don’t live together. I think if there were more shared areas. One of the paramilitary boys, one of the parents in the school said to me ‘I can’t cope with this anymore’ and I said why? He said ‘I was told for years anyone who wore a Celtic skip
(jersey) that I was to kick them to death and now I’m supposed to hug them?’ And that said a lot about the leadership who wanted to move on. It’s very difficult.”

Billy paused for another sip of water, his mouth being extremely dry he explained as a result of the cocktail of drugs he was on for pain and nausea relief.

**Courageously Intentionally Inviting the Community**

“I wanted to be very inviting,” Billy said. “When I first came to the school the parents were not allowed in the school except for one parent night. Parents were not welcome. I came to school the first few days and it was bucketing rain outside and I went out there and said to come on inside and stand in the hallway and they said no. They wouldn’t come in. They knew they weren’t allowed in. Staff wouldn’t invite them in. We went in and said to the staff that this is so stupid. How would you find it if you went up to your own school? That’s probably the case in quite a few schools.”

I thought about the way in which we invite parents into the school at St. Stephen’s and the work we did with them to invite appropriate parental engagement. I asked why he thought many schools were similarly set up with very clear distinctions between staff and parents and lack of contact. His reply was situated within the context of the realities of life in Northern Ireland as the political and social structures present unique challenges to the creation of an inviting school.

“I think in a lot of cases there had been a lot of threats by the paramilitaries. They’d come up to the teachers classrooms and threaten teachers in them so they were afraid to have anyone come into the classes. So that was the point. There’s always a tipping point somewhere and I said you have to take a chance here. So we had a “Quiz Night” one night. I remember getting a note from a teacher. She had gone to a very charismatic church and she said ‘I don’t want to be sitting beside the tattooed yobs from
East Belfast estate.” I remember saying to her ‘Sit at home this Sunday.’ She was quite hurt by it but if you can’t work with the people you shouldn’t really be there. Then the staff wouldn’t give me any help to run it. But then some of the classroom assistants and VP said they’d give it a go and they helped and it was one of the most successful school events we’d ever put on.”

“But you know as a principal yourself,” he said, “you have to develop a bit of daftness. It does no harm. Just gradually taking a chance, taking a chance until the staff say you know its ok. Then they opened up the classrooms to the parents in the morning. We started coffee in the morning. We’d bring in people, mostly widows, and gave them meals and they were great. We wanted to become more of a community. We gave the police one of the rooms in the school so they could operate an out station.”

“So they could work with the kids?” I asked.

“It was quite a battle to get it,” he said. “One of my friends was a senior policeman in Portadown and he helped me. I stopped two policemen one day on the estate and said ‘why are you walking around on the estate?’ They said ‘We’re community policemen.’ And I asked them why they were doing it while the estate was empty. ‘Why don’t you come down to school when parents are visiting, during home times, etc.?’ I said. They started to do that and it opened up tremendous opportunities for themselves. They started taking soccer in schools, playing with the kids. It was very successful until the new police superintendent came in and had new priorities. That can happen. That put the policeman as someone who was helping the community rather than someone who was hindering it.”

“It was actually quite funny,” Billy said. “Rob was the policeman. He was about 6’7”. A big guy. He was in the nursery. You can imagine him giving a talk in the
nursery about the people who help me, and one of the boys asked “Is that a gun?” referring to the Glock pistol in his holster. He’s not allowed to take it off you see. He says ‘Yes, it is.’ The boy says ‘Well my daddy’s got one tucked up in the roof space of the garage.’ Rob says oh right, walks off so a wee bit of industrial daftness goes everywhere.”

Inviting Scholarship, Fostering Community

“Once we started it took me a wee while you know you have to gage your staff to find out who were the good teachers and who were good and telling you they’re good. It took a wee while to sort that out because no one was in the classes,” he said.

“The principal was never in the classes?” I asked.

“It wasn’t done,” he replied. “The unions weren’t on for it.”

Billy’s passion for education was obvious as we talked. He was thrilled to speak about children doing well, learning a new concept or coming out of their shell as he was about on-going adult education. Staying current and relevant was stimulating and he modeled and expected others to model as well.

“I went into the library to check the training records and realized that in eighteen years no one had ever been on a course!” he said.

“Was it a stagnant staff situation then?” I asked.

“Many were looking forward to retirement. Nice enough people and in their own way good teachers. They were good teachers for a system that no longer existed. Because everything was changing to activity learning, Gardiner, multiple intelligences. Nobody had ever heard of it. Not a thing. In a few years I had to close down eighteen years of no change and just train, train, train. Get people courses to go to. I’m sure you’re the same,” he said to me. “You go to find courses then the penny drops: you’re
got great people here who have many talents who may be willing to share their talents. That’s where John Novak’s stuff came in with inviting leadership. I used it at the last school but you have to wait until people are ready. It’s a bit frustrating. But you get a good core group of people to make the decisions and move on and you take a vote to see if you’re with us or you’re not.”

The school was safe to the staff when Billy arrived and while they feared the changes he would bring they seemed to come around to the excitement of doing things differently and putting children at the forefront. Utilizing the strengths of the staff not only tapped into existing resources but empowered the staff to realize the value of their contributions to the whole. I asked Billy about his vote as he attempted to get staff on board.

“Well it was in terms of community relations,” he said. “I knew that when I started to work with the Catholic community the first effort we had lasted an hour. We said to the staff that we’re going to try it again but not unless there is support because I can’t do it on my own. The vote was that everyone was willing to give it another go and we started with one school then we started linking with schools in the Republic of Ireland. We started linking with schools across Northern Ireland. Things started to change as a staff.”

“We started to have a few meals together as a staff. You know; lunchtime meals. Everyone would bring something. The staff became more equal and that can be difficult because sometimes your classroom assistant is a better leader than the teacher. Sometimes the caretaker’s the best person in the school.”

“Absolutely,” I agreed. “Or the secretary.”

“All sorts of things can happen. People find it hard to let go. When I first came in
everyone called each other by their surname. It’s never been my style now. Now it’s everyone uses their first name. I found that we had some very talented people. Then we found that people started going to London on the weekends together, you know; shopping trips. Going out for dinner. Visiting each other’s homes.”

I smiled as I thought about my staff back home in Canada. They were in the midst of planning a trip to New York City together. Fifteen staff members planned to catch a flight after school one Friday to spend the weekend together as colleagues and friends. The camaraderie and friendships contribute so significantly to the culture of the school as staff plan together, support one another and model friendships and respect for the students setting a positive tone. I asked if these excursions or friendships had existed amongst the staff at East Belfast before.

“Not really,” Billy said. “It started to creep, creep, creep, and then it just snowballed. This is why in some respect I was explaining the background to Gardiner’s work and multiple intelligences, invitational schools, emotional intelligence, and all you would do was broad brush, brush, brush. It was after about four years when Heather came up and said ‘you know I was reading that document you gave us, the ten year plan.’ There had been no plan up to that point. And she said ‘I realize with each year how you embedded goals into the school’ and I told her that’s what the ten year plan is. She didn’t think we could do two or three things at the same time. But you know the way you take core elements that go across a number of programs, so you’re actually introducing two or three things. Nothing’s linear.”

“Different perspectives as well,” I offered.

“Absolutely,” he said. “It was great and every day I tried to talk to somebody. Maybe an hour. We’d get together and have a wee yarn. Get to know them. Maybe
family problems, medical problems, relationship problems. You would take an interest in them and then you’d have the feedback coming in. One of the things I always said was; you know you get these job requisitions? The board would always say ‘You can’t write that in!’ You know you write in all those details about the qualifications you’re looking for and I would always write in ‘I want somebody to love the children.’ You have to put qualifications etc. but I would say that’s what I want. They would never let me do them. But that’s what we would always say when we would interview the candidates: that they love the children. There’s not an awful lot between one qualification and the other. You go through them and if you have any wit at all you’ll get through the academic side.”

“It sounds like you have had an inviting approach before. You gravitated toward people who were inviting. Did you find that reading the work put it into context for you?” I asked.

“Meeting John Novak. He came to one of the weekends for my MBA. Everybody instantly liked him. We had some really charismatic speakers. One lady, I don’t remember her name but she chewed gum for the two and a half hours of her talk and we were transfixed on that. I will always remember her face but never her words. Then John came on and everybody instantly liked him. They liked the way he did things. He was very unassuming. I think when you can get somebody like him that can take a very outgoing group and it was an outgoing group. We had known each other, many of us for thirty years since college and he just made that instant impression. I remember going back to Aughnacloy and I remember saying ‘right, we’ll have a go at this.’ I think you’ll like his stuff and they said ‘What’s the theory?’ and I said ‘I tell you what, let’s not worry about the theories and we’ll try a few wee things and we’ll let it grow on us.’
The Principal’s Been Shot

I wanted to know what those first few “wee” things were that started to move down an inviting path. Billy started with his time as the principal in Armagh.

“We were very fortunate because it was a country school. It’s down along the Tyrone/Monaghan border and there were no real links between Catholics and Protestants and people were afraid and there were a lot of murders. The principal beside me was shot. The principal on the other side was shot…”

Once again his matter of fact tone betrayed his words, as if principals being shot were as regular an occurrence as a transfer. I was beginning to think that was the case. When he talked about someone being shot or a bomb going off there was never a hint of alarm or distress in his voice. It simply sounded like the way it was: the reality of normal life in Northern Ireland at the time. Protestants lived in one community, Catholics another. Men were shot. People were blown up in cars and in the streets, and both sides hated each other for perpetrating the acts. Through the cycle of violence, hatred seemed easy. Billy had other ideas. He was optimistic about the future of Northern Ireland, trusting in the good within each and every student and the responsibility of teachers to provide the guidance to make it happen.

It took an extra moment to sink in but when it did I shook my head and repeated what he just said to clarify that I had heard correctly.

“The principals were shot?” I said.

“They were part time soldiers,” he replied as an explanation. Not that a part time soldier, or police officer or prison guard for that matter, deserved to be shot, but that when you take up that role you do so aware of the ramifications and potential danger.
“The bus driver for the school had been shot,” Billy continued. “One teacher on my staff had lost three relatives so it was very hard to build trust. Then in 1994, Father Nolan phoned me from across the border and asked if we were interested in meeting some Catholic folks? So we met up. I went with my Minister and the only place I could get for this meeting was one of the parents of the school owned a pub. Now you try getting a Presbyterian Minister and Church of Ireland Minister into a pub. Parish priest was fine though…” he laughed.

“We met in this pub and a few door openers would come from the Department of Education and we worked on other projects. They started a cross-community playgroup for a number of years. But every time you’d mention bringing the students closer together they’d always say they didn’t want to. Both sides. ‘I don’t want my child to marry a Catholic (or Protestant) you know if they meet. You know this. You’ve been through this’ they’d say. I said we’re not running a dating agency. We’re only doing a few activities. We started doing a trail at Blackwater River. We visited each other’s churches. The Presbyterians hated me for that. ‘Traitor’ they called me. Then we started to swap children. It was just working my way through the book. What were the procedures they had in schools and in what ways did they invite or disinvite. The Catholic children had never been into Protestant schools in the North. Just crossing boundaries. Then all of a sudden the boundaries no longer existed. That made a difference. Once people realized that the world wasn’t going to fall apart.”

The physical border between Northern Ireland and the Republic was removed following the Good Friday Agreement and that visual reminder of the divisions was no longer there as Billy attempted to get students beyond the social and political borders they had grown up with as well.
“We won this prize,” Billy said. “In Strasbourg at the Human Rights Court. We took a group over to get it. We took classroom assistants.”

Title distinctions and artificial hierarchy did not appear as important to Billy as the respect for the contribution of all to the betterment of the school. He once again breezed through the reference to winning such a prestigious award. I pressed him for more details.

“How did this recognition come to be?” I asked.

“Oh my goodness it was so long ago,” he said, seemingly trying to move the conversation elsewhere.

“Was it because of the cross-community projects?”

“Because of the cross-community,” he said, “and taking a chance. The guy who won it the year before had been the president of the European Commission. The medal was named after Marcel Rudolf. He had done an awful lot to bring the German and French people together. They wined and dined us. Ronald Reagan had been in before us and the woman in the restaurant took out the picture to show us. John Hume and Mrs. Reagan. They wouldn’t eat the food though she told us. They were very particular about their diet,” he laughed.

I asked Billy about how such a prestigious award was received in the community.

“That was the turning point,” he said. “No other school had done anything like this ever and we couldn’t get the local papers to print it. They just wouldn’t take it. We tried explaining to them. Every paper in the Republic of Ireland took it. Every one. We had friends calling us from Germany saying that they saw us on television but no one at home would pick it up. It wasn’t a bad news story and it’s easier to print bad news. We
Billy spoke of these national and international awards as casually as he might have of a school fair just as he did of the shootings and bombings that plagued the country. They were simply the reality of living, working, and leading in Northern Ireland. The awards were important but not to Billy. He did so to reveal to the community what others from the outside understood that might not be as easy to recognize from within. He wanted them to know that peace is possible but the local papers did not seem interested. While those in the Republic seemed to embrace Billy’s approach to educational leadership, the media in the North chose to ignore. Billy wanted his community to reconsider and understand that the way things have always been need not dictate the future. Small gestures can change hearts and changed hearts can change lives. The awards let the entire community know that the world was not only watching; they were doing so with both hope and interest. Billy understood that and celebrated and promoted imaginative acts of hope from within the school and community.

**Moving to East Belfast**

“I first got sick years ago and I needed to be closer to home so I applied to the Belfast board. I was asked by Martin McAleese. That made me go to some of the big Protestant estates to work with people there and help them. So I went up there and it was different because where I was before there was a group who were in the Provisional IRA and they’d have shot me as soon as look at me but the only reason they didn’t was because I was friends with Father Nolan. They had the same problems but didn’t realize it. The children in school, there was a lot of sectarian language.”

“At East Belfast too?” I asked.
“In Aughnacloy too. One of my children went to Aughnacloy from here and came home one night and said ‘What’s a Catholic?’ And I asked why? And they said ‘Somebody asked me that today’ and I said it’s just a person like you or I. They just go to a different church. But at East Belfast it was wild. We ran a course one day for children. We had a very famous actress run it. We had this very tough family in the school. It was running for over an hour and I was sitting listening waiting for a riot and this boy came in with the teacher. She said ‘Mr. Tate, this boy won’t play with this other student.’ I said right, and the teacher went away and I said to the boy ‘You know what happened? You played quite contently with this other boy for over an hour and then you discovered he was a Catholic and now you hate him.’ Nobody had ever brought anybody in from outside the area and you were challenging the misconceptions people had built up in relation to their religions, thoughts, and their processes and they couldn’t cope with it.”

“Where there any Catholics at the school?” I asked.

“We had a few Catholic children, but they would never say they were Catholics. They were maybe mixed marriages and when we started doing the cross community thing they would come and say ‘Mr. Tate, I’m from a mixed family.’ I never really said to anybody. But then it just disappeared. The only time I ever heard anything I’d stop it straight away. If I ever heard anything I’d suspend them straight away. Five days. Then it was gone after the first few months.”

“Would they fight each other?” I asked. “I mean within the group?”

“The parents’ attitude was always to hit back hard and always get yours in first. Then I introduced a rule that said if you strike back you’re suspended as well and that stopped it. Then we introduced pastoral care. We introduced documentation to the
children on bullying. You just keep tipping away at it bit by bit you start to replace the attitude. Then all of a sudden, the scores started to go up."

As a school principal in the Ontario system I was well aware of the pressure on schools and school boards to perform well on standardized assessment. The annual publishing of the results was highly anticipated as an indication of everything from the teaching at a school to the cost of real estate in the area. Billy made the connection between changing hearts and minds and student achievement.

“We started focusing on learning things,” he said. “At that stage there wasn’t much on the learning side. Staff began to look at how we could lift the standard of work and we started really to lift the standard of work. We had a great teacher named Richard. He’s a vice principal now in another school. A good friend of mine. He’s gone to a school which received the second worst inspector’s report I’d ever seen. He’s there a year and six months and he’s made an awful difference. At our school we had our second report and it was a really good report. It was tremendous. The school had had two in a row that were awful before. Then for the staff the penny dropped and we turned a corner. Then whenever we tried to do something exciting they knew it would work.”

As wonderful as the projects and initiatives sounded; bringing students together and engaging in cross-cultural activities, it could not have been easy within the social and political climate in the school. Staff had to be hesitant because of their own beliefs or because of fear. Getting that many people onto a radically different path, as morally sound as the goal may have appeared, must have presented some extremely challenging situations. Not everyone would have been on board and ready to dismiss a lifetime of prejudice. Preaching to the converted is one thing. I wanted to know about those staff members who were not as prepared to do so.
“I can think of a staff member,” he said, “who is very Protestant. Culturally so. Her husband would be a member of the Orange Order and she didn’t want to have the McAleese’s in the school. The day the McAleese’s visited was the day I knew there was something wrong with me. I was under a lot of pressure and she was talking about people of ‘the other persuasion.’ But the staff now, we’ve got more of a mix of Catholics and Protestants.”

Historical, political, and cultural biases would suppose that a school at a housing estate in East Belfast would not have any Catholics on staff. One would assume that they would not be welcome nor would they want to work within such an outwardly hostile environment, regardless of the potential for employment. Billy had begun to challenge the status quo preconceptions quietly and without fanfare. He understood that boisterous proclamations challenging sectarian divisions would be met with opposition and aggression. Introducing Catholic staff members to the community in a way that encouraged others to get to know them as people, teachers, care givers first and the potentially their cultural and religious affiliation second was more likely to succeed. He understood how easy it is to hate those you do not know but how difficult it can be to hate someone you know and respect. While it sounded good in theory, I asked him how it was possible given the school’s Board of Governors and the feelings within the community to actually hire a staff member who happened to be Catholic. Such an appointment would not only be difficult practically, but also potentially dangerous.

“We appointed,” he started, before putting a finger over his mouth and smiling as if he was sharing an intimate secret. “We didn’t actually appoint,” he continued. “I just didn’t fill out a form.” Billy started to laugh and as he did the whole bed shook until he started to cough uncontrollably. I reached over, picked up his plastic glass of water, and
offered it to him. He held out a hand to indicate he was ok, sipped, and sat back down on the bed again.

“The Governors came and said to me ‘Billy, do we have a new teacher?’ and I said yes. They said ‘We don’t remember hiring anyone’ and I said no. They said ‘Is she a Catholic girl?’ I didn’t say anything but the silence gave me away. After a good stretch of silence he said ‘Will anyone find out?’ I said no and he trusted me and we took a chance on her. Sheila’s a really good teacher. We’ve got other speech therapists who are Catholics.”

Based on everything he had said up to this point, I assumed this would have caused uproar in the community if they found out there was someone from the other side amongst them or more importantly working with their children. I asked if anyone knew or if anyone asked.

“They don’t bother,” he said. “I’ve always been a risk taker and I think that the one thing you have to do is take a chance and defend your staff. There’s never been a comment in two years. Never been a comment. Her boyfriend comes into the school to do wee jobs as well. You just open up. A great one I live by is if you don’t have to make an important decision today don’t make it. You say ‘my goodness I’ve been doing this for a while and nobody’s said anything’. It’s amazing.”

A knock at the door interrupted the conversation briefly as Billy’s daughter entered with a fresh cocktail of medication to help his with the pain and another plastic bottle of water with a straw. She put the medication down on the dresser along with the water bottle, placed pills in his hand, one at a time and watching him laboriously swallow each until she was satisfied. She asked if we needed anything else before excusing herself.
“One of my good friends runs a lot of cross-community things. I said to him that folks like us could start up a cross-community education system. He says no. He tells me that he believes that Catholics and Protestants should always be separated. I just couldn’t believe it. I can’t work my way through what it is to be in the Catholic community that we can’t work out normal lessons together. Father Sean had not the slightest problem with it and we used to work together with children all the time. “

“Kids aren’t the way they are until we make them that way,” I said.

“There’s a very interesting man named Norman Richardson and his research shows that there is sectarianism at the age of 3. You’re beginning to find the emphasis is there and it’s only one of the problems when nursery children aren’t segregated and at college they’re not segregated. It’s only the places in education in between. There’s a lovely wee lassie, my Derry girl I call here, gorgeous girl, red sort of hair. She’s a Catholic girl and she came into my school and said ‘I’ll leave you my CV but I suppose there’s no chance getting any subbing here’ and I said ‘What are you doing now?’ and she said ‘What do you mean?’ I said a teacher’s called in sick would you mind doing the day and that was three hours ago now and she’s in and out all of the time. That’s the problem that I’ll only leave my CV with Catholic schools or I’ll only leave my CV with Protestant schools or integrated schools and trying to break down those barriers and overcome them. In those respects you can wear yourself out. I’m here today because of stress.”

Billy indicated his body lying under the sheets inside his bedroom.

“I think I’ve worked myself too hard,” he said.
Dinner With a Hunger Striker

Billy had just finished attributing his illness to the stress involved in his life’s work toward peace, forgiveness, and reconciliation from within the school system when I asked if he felt that way if he thought it was worth it. Has he made the impact he had hoped he would?

“I can see where people have changed,” he said. “Parents have changed, children have changed, and even the departments have changed. I wouldn’t say I was the smartest in the bag at Stranmillis College. There were people who were more talented but they were afraid. I think if you work it out in your own mind that something is worth doing then go for it. The doors seem more open than closed. I’ve always taken that attitude that we can’t let it fail. We’d go to meet people who I never thought I’d meet like hunger strikers who were so far out of my world you know, you were just meeting people who were challenging the way you thought or how you would do things.”

Hunger strikers consumed the Catholic imagination during the Troubles when IRA prisoners rebelled against their treatment as criminals rather than political prisoners. In an attempt to be recognized as political prisoners with the unique rights and privileges that accompany that designation, IRA prisoners staged protests by defecating inside their cells and spreading it over the walls, refusing to bathe, and in final acts of defiance, refusing to eat unless recognized by the British government as political prisoners. Publicly dismissed by Margaret Thatcher, the hunger strikers, led by the most famous and the first to die; a Republican prisoner named Bobby Sands, began to die of complications from starvation within the Maze prison outside of Belfast. The popularity and support for the hunger strikers by the Catholic community was so immense that Bobby Sands was elected to the British Parliament as an MP from the Sinn Fein Party posthumously. A
school principal leading cross-community educational projects is one thing, but a
Protestant community leader and educator meeting hunger strikers seemed extraordinary.

“How did you get to meet hunger strikers?” I asked, astonished.

“At the start of 1997 to 2000 a couple friends of mine were trying to meet and
bring about middle ground between unionism to accommodate Catholicism so we were
meeting up at Clonard Monastery where all the stuff was done between Sein Fein leader
Gerry Adams and the different groups signed off the agreements and brought the
Troubles to an end so you’d meet people up there. Former heads of paramilitary groups
and they were interested in a unionist perspective and interested in a republican
perspective because it’s hard to hate someone when you get to know them. So we’d then
meet with the loyalist groups. I find you meet someone and you have to listen to them. I
find that’s a hard skill: listening. Today you’ve got to listen so much more because
there’s more information and you have to invest six to eight months in a relationship
before you offer any advice. Just listen to the person.”

Billy pointed to a photograph on the dresser and asked me to pick it up and hand it
to him. He pointed out each person standing around him smiling widely for the camera
and why the photograph and others he lad like it with different people were so unique.

“We used to, Margaret and I, run events here and invite a prison officer and
former paramilitary and republicans, policeman, soldier, minister, priest so nobody ever
knew who was coming. Throw the front door open and make people work,” he said.

“Try to understand their point of view as we were trying to pick people who were in good
positions to make a difference in the area they were in.”

“You brought former paramilitary, republicans, police office, priest, minister, and
soldier together for dinner?” I said.
“Yes,” he replied.

“At the same time?”

“Not the same group all the time. Mixed up but yes, that was the idea. There’s no point in us carrying on any further,” he said, referring to the on-going sectarian strife and community segregation. “They started to set up meetings and it started to spread. All these people we knew were unassuming folk. You’d never pick them out of a crowd but all their work was done behind closed doors. They never wanted any praise or award. They just did it because they thought it was the right thing to do. I think it’s the same in school. You pick people who can make a difference. Like my staff. They organized the McAlesse visit. It wasn’t my visit it was theirs and they were so proud when they were done. It was good for them. Then we organized a trip down to Dublin.”

Committee Work With the Taoiseach

“The Prime Minister, the Taoiseach, Brian Cowan, asked me to sit on a committee and we went down because we thought it would make a difference in links between the north and south and the areas of sectarianism. There was a panel meeting and I was invited to sit on the panel. Teachers asked what I was going to do and I said I’d go sit on the panel. I was told that it would be just asking questions about the things we’d done at my schools but when I looked down the hallway at the others on the panel I saw other people who had been there for a long time like me and who’d come through their organizations and were now at the top of them making a difference. It was very gratifying. I bet if we went back to the early days with all of us we’d have been dismissed as eccentrics and dreamers. Well meaning, but we’d fail. Now there we were; on a committee with the Taoiseach at the top. If I remember one thing about that day that was it,” he said with a smile.
Billy paused and gazed at the wall at the end of the bed, looked up at the ceiling and took a deep breath.

“I won’t be around to go to the next one,” he said, “but knowing there are a sufficient number of people there who will make a difference is important.”

**Supporting the Two Percent**

“On your staff you only need two percent to make a difference,” Billy said. “Two percent. Look at Marx’s labour strategy. It’s always a small number who have a seed of an idea and can make it grow. That’s what you’re trying to do with children. Spot potential leaders. They can come from strange places you know. I have a lot of time for unassuming people who might be child five in a family and the children above them got all that was going. There’s something special about a child who is quieter and successful. I can think of parents at school. They don’t want to take a lead role but will always show up on the day of and say ‘Is there anything I can do for you?’ They don’t want to put their name on the sheet. Those are important people to have around.”

“I was 36 years old when I became a principal. I was in the secondary school. I remember from about the year 26 until I was about 30-something I decided to opt out of the rat race and decided I wanted to do things the way I wanted to do them. We set up links with the Catholic school. Sisten Kinlin. We decided to work with disabled children, took them away on weekends for trips. We started with a group of five that turned into a group of 250. We got leaders to work with them and took them away to the Fermanagh Lakes. They were from both sides of the community and had a lot of sectarian problems and it turned into one of the most successful projects.”

“Why didn’t you keep doing that?” I asked.
“At that stage there was a job for the vice principal in the secondary school and I decided I was going to do something different. There was a job for principal in a four teacher primary school so I applied for it. I got the job and the principal came out to me and said ‘I’ll promote you from within, don’t go.’ But I said I wanted to do something different. Then when I moved to Belfast, no one thought I’d leave that school I was in at Aughnacloy but you can’t keep doing the same thing.”

“Do you think that by the time you got to East Belfast Primary you were ready to be at East Belfast?” I asked.

“Yes,” he replied. “There’s no two ways about it.”

“As opposed to it being your first school,” I said. “The challenges faced at East Belfast would, I would think, be very intimidating to anyone, let alone a principal with limited experience.”

“Actually, the first time I made a commitment to go to East Belfast was 1974,” he said with a smile. “I went to see a drama at East Belfast Primary School and I remember thinking ‘I’m going to finish my job there’ so it took from 1974 until 2003 for the gap to be closed and for me to find the job. A couple of friends had been here before and had a hard time with the paramilitaries but it was always in my mind that I would come here.”

“It won’t be this way now obviously,” he said, motionless in bed. “I don’t think I’ll leave this room again.”

I wanted to say that he was wrong, that things would get better, the drugs would work or the cancer would go into remission. That’s what one does when presented with such a statement. Dismiss it and feign optimism. I tried, but I couldn’t say a word. I smiled and nodded in agree resignation. He looked at me and smiled.
“I also thought about going back to Portadown to bring the communities together there. It’s hard going.”

I was enthralled by his life-long commitment to peace projects and initiatives with children to foster peace in communities who had not seen it in generations, but I couldn’t help putting my principal’s hat on to talk about test scores. I also couldn’t help changing the subject away from mortality.

“I find your interest in supporting peace initiatives and your eternal optimism that a better future is possible for the children in Northern Ireland as well as the notion that because of or in spite of, perhaps you can tell me which, your standardized test scores at East Belfast have gone up. The better the school community, the more supportive, engaged, and harmonious, the more chance at students achieving academic success. I’m sure the parents must be recognizing the benefits to their children academically as well as socially and culturally,” I said.

“We were seeing suspensions from twelve or thirteen down to zero as well,” he replied.

“I supposed it takes a lot of effort to hate,” I offered. “That effort can be better focused on learning.”

“Then the detentions stopped in school. We were beginning to find that the relationships between teachers and students were more relaxed. I’d walk into rooms and it could be a wee bit disruptive to the staff because the children would come up and give me hugs of high fives. Staff have gotten used to that now. That made a difference. The inspector would come down from the Department of Education and we’d go into a classroom and nobody bothers. I would say five years ago you would never have done that and the staff would drop dead and call the unions. But once people realized they
were doing a good job and making a difference, it was incredible to watch how quickly
their professional development would go up. They would say it was great to go to
courses and know a bit about it before going. You know there were people who were
going to leave this school and move closer to home but they didn’t and decided to stay
on. There was one of the teachers who was offered a job at one of the big prep schools, a
real gem of a job, and she turned it down to stay at East Belfast, which is just phenomenal
for anyone to do that. I think once you realize people are quite happy and that’s why I’m
sad at the moment to be here in this bed, away from them all.”

His thoughts turned back to Mr. Woodman in his final days as Billy contemplated
the impending end of his life from the sanctity of his bedroom. He smiled as he thought
about Mr. Woodman’s last days with cancer and how he chose to spend them.

“Mr. Woodman, the wee man took the assembly every day and gave a bit of
himself. I remember he was in the hospital dying of cancer and he wouldn’t let anyone
help him. This was typical of him. Not that he didn’t want to work with people and have
help per se, but he didn’t want things to be about him. It was about serving others. So
he’s in the hospital in his last days before the cancer took him and one of his pupils died
that week. He was a police man. Blown up in his own car. The bomb was under the
wheel well as they usually are. Not sure why he didn’t check that day as he would have
most days. Maybe he just didn’t see it. So he wrote a poem for him and that was just
wee Woodman. Don’t think about me, think about helping someone else. I think that’s
it,” he said. “That’s the essence of it all.”

**Mentorship Matters**

As Billy talked about staff members his eyes lit up. Particularly when speaking
about Rodger, a former staff member who was working as a vice principal at another
school.

“Rodger and I, he’s left now, we stay in good contact with one another. About every other week.”

“You feel mentorship is important?” I asked.

“Under pressure it’s always good to have a wee chin wag to see what we can do together. Sometimes it’s with someone on the other side of the country which is nice because you know it’s never going to be discussed at this end of town,” he said.

“I remember a fellow calling me up one day and he was crying,” he said. “If you’d pick a thousand people and said this guy would be crying I’d have said never. Never. A teacher had brought a tribunal case against him and he said to me ‘What do I do Billy?’ He told me he received a solicitor’s letter and I said ‘throw it in the bin.’ ‘The unions will go daft’ he said and I said ‘throw it in the bin.’ Wait until you get four or five of them and then start worrying.’ He cried some more but we got him through it. I saw him about a year later and he hardly ever spoke to me because he saw crying as a sign of weakness. Who doesn’t cry a tear or two in school? Everybody does from time to time. He’s done exceptionally well for himself but each staff he has, he doesn’t know how to bring the staff along with him. I thought that said a lot at the time. He knew where to go to get his advice, but he couldn’t accept the fact that he could be a failure in his career. Nobody’s career goes sunny all the time.”

Collegial mentorship can support leaders through difficult situations but the role of a leader is also to foster the next generation of leaders to provide them with the skills and competency to make an impact on the next generation. Billy was matter of fact when describing the story of mentoring a colleague, but he lit up with pride when speaking about members of his own staff at East Belfast.
“I have three or four on my staff who I think will be really good principals and a couple of others who are really coming to the fore. Richard’s just left. He’s very good. Only 29 years old, but very good.”

I understood the difficulties a young administrator can face when leading more senior staff members, and appreciate the importance of recognizing leadership in young teachers and providing them with opportunities to take on significant roles within the school with an eye to future leadership positions. Billy nodded in agreement.

“You know when you meet someone you know? Richard and I would sit with me for a half hour or more every day for the two years he was at East Belfast,” he said. “How would you do this? How would you do that with this problem and that problem?’ he’d ask. Then you discover that you’re doing less and less talking. They’re doing the talking and you know they’re ready to go. It’s trying to work out how the system doesn’t kill the new principal.”

My insecurities regarding age have dissipated over time. Not that time has bestowed upon me the experience I felt I was lacking, but rather I recognize in other, younger potential leaders that age and ability to lead are not necessarily co-dependent. Billy was describing the importance of discernment when encouraging a leader to take on more responsibility, but perhaps more important, was the recognition in the first place and the commitment to mentorship to support and encourage.

“If I could say one thing to a new principal or a principal of the future I would say never stop learning. Like myself now on this journey,” Billy said, referring to his prognosis and future facing his own mortality from within his bedroom.

“You learn a lot,” he continued. “A lot of the skills you learn in school you put into practice. Not losing your focus. You make this journey I’m on now alone. Not with
anyone else. You have to make it alone. You learn somewhere along the way. I think probably as I come closer to death I start to be a bit more frightened but that’s what being a principal is as well. You fear. And you prepare to take a risk. I would say to everybody that there are some people who can definitely be taught to be a leader and some people who can just lead.”

Billy regarded himself as an educational leader in life and in death. He lived his life wanting to know more about everything and to model that love of learning for staff, students and parents. Lying in his bed, unable to move more than an inch or two to the left or right, Billy remained committed to leading and learning as he faced the final days of his life. It was a journey he had never been on before and though fearful of the final destination, he was excited to learn more about what it was going to be like along the way. He wondered about how his body would change with each passing day, how he would react to the ever increasing chemical cocktail coursing through his blood. How he would face the end and support his family through it. While his children were in the mourning process already, his wife had not accepted the inevitable. Billy’s wonder and amazement regarding his embrace of the end of his life seemed genuine as a curious life-long learner, while also calculated as a way to support his wife as she prepared for his final days and a life without him after. He was trying to inspire wonder and awe in her as well, so they could celebrate and discover together. An educational leader until the end.

Billy became silent for a moment. We allowed it to hang in the room heavily for a few moments until he brought the conversation back to mentorship for potential leaders in schools.

“I’ve been talking to the Minister in the Republic about trying to get them to open up a 32 county Irish Principal’s college,” he said, referring to all of the counties in
Ireland, not the 26 in the south and 6 in the North but all on the island. “No North or South just all 32 counties committed to supporting and mentoring potential school leaders. But politically, you know…”

Billy shrugged his shoulders and smirked, knowing he was fighting an ideological battle which he would not live to see the fruits of.

“That work would be very useful,” he continued. “People in the Republic don’t see themselves as sectarian. They are. Even if you’re only living on an estate or you’re living in a posh house and someone isn’t you’re cutting them off. You don’t want to mix with them. Everybody has some sectarian in them. You’ve got to learn to cope with that. Having everyone together in a college that would promote and support educational leadership and future principals would be a great way to chip away at that sectarianism. To bring people together. That’s what I’ve been fighting for my whole life.”

“When I first started teaching, you just finished your degree and that was it until you finished your career. There was no training, no access, nowhere to go. Now the expectation is that you continue your training to get better. The only thing I disagree with now is having to pay for it because it’s access. That’s part of the common good. Everyone should have the ability to continue to go to school to better themselves and support their students.”

Billy leaned toward me taking a conspiratorial tone, as if to not be overheard outside the confines of the bedroom.

“I didn’t tell my staff this,” he said. I felt like I was about to have a secret conferred upon me that no one else knew about.

“I didn’t take a pay raise these past three years,” he confessed. “I gave the money to young teachers on my staff so that they can go and train at courses.”
I smiled as I thought ‘My wife would kill me if I turned down a raise.’ I wondered if his wife even knew considering the hushed tone he used when revealing it.

“You can do that?” I asked, wondering how the logistics of that would work from a payroll perspective.

“You can,” he said. “Well, technically if you turn down your pay raise it’s turned down but we have performance related pay so I pass that performance related pay on to staff for training.”

I smiled as I thought about how my wife would react if I told her I was giving away bonus pay to younger teachers. Billy committed to living and leading a radically invitational life.

“I don’t need the money anymore,” he said. “We gave it to three young girls on staff who are in their 30s and one of their husband’s not well and if came at just the right time for them. A good thing for them,” he said proudly, obviously delighted with the decision to forgo the money to support others who needed it. From the perspective of his bedroom at the end of his life, it appeared to be money wisely spent.

“You get to that stage where money is no longer the thing that attracts or provides status.”

“You don’t get into teaching for either money or status,” I said with a laugh.

“There’s something really special about teaching. I just think it is giving people wings. There’s nothing better than looking at a child’s face and knowing they learned something. I was at Stormont one day and a young man came up to me and I looked at him three or four times and I knew I remembered him from somewhere but couldn’t remember where. He came up to me and said ‘Mr. Tate, do you remember me?’ I said ‘I must have taught you somewhere along the way. Give me your Christian name’ and he
said ‘Kenneth’ and I said ‘Kenneth Bishop’ and he said ‘Yes.’ He said ‘I’ll never forget
the lesson you gave me in history. I said ‘Kenneth, I’m still giving the same lesson 30
years later.’ We laughed. It was funny because he never really worked in a school and
every teacher at the school thought he was stupid. Here he was standing in front of me
and he had a Masters and a PhD and it was just that his family was splitting up at the time
back then and he came to our school at a very difficult time. But you know when
somebody has that spark? You know they’re going to do well? That was Kenneth."

Mentorship need not always be direct but can still have a tremendous impact when
intentionally leading an inviting educational life. As teachers we do not always know the
depth of the impact and mentorship we make on our students as opportunities to run into
students such as Kenneth do not always occur. Living intentionally educationally can
make an impact on students or colleagues in ways we might never fully appreciate or
understand.

“I think there should be opportunities in school where you can free up staff for a
year and mentor them,” he said. I loved the idea, but recognized the idealism in the
suggestion.

“Through the whole year,” he continued. “Take them through the year and
mentor them and prepared them for a principalship. There is something about mentoring
for mentoring’s sake. You know you’re not going to get the benefit in your lifetime but
assuming that someone else is doing the same somewhere else you’ll get their VP and
they might get yours and there is a collective benefit from it. That’s what I would have
liked to have seen more of.”

Billy had been asked to teach the principal’s qualification courses in the past but
found them difficult because of the inflexibility of the course delivery, referring to
teaching it as “reading off a script”.

“There are things that a script from a text book cannot teach and that is the difficulty with the qualifications course compared to the importance of mentorship. While simply swapping stories may not improve practice, the sharing of best practices and strategies does, especially when the principle can be applied universally.”

Billy and I shared stories of situations involving the trimming of trees on our school properties and the conflict caused on both communities as neighbours and parents complained, offered opinions, threatened to sue, and even chained themselves to a tree in protest. We laughed together as school principals, enjoying the opportunity to share stories of experience about the reality of life at the helm of a school which is the centre of the community. Despite being an ocean apart and existing within vastly different political and social contexts, the mundane was extraordinarily similar.

**Theories and Practice**

Sitting beside Billy’s bed as he struggled with readjustment or reaching to the plastic cup, I wondered what kind of impact he had hoped he was leaving at East Belfast. His commitment to life-long learning and modeling leading an educational life became clear.

“There are good staff there,” he said. “The children are nice children. Most of the parents are grand. No more than two or three now who are not.”

“That’s not bad then,” I laughed.

“No,” he said.

“Did you find most people were good people and they just needed the opportunity to be so, but they were the way they were because that was the way they thought they were supposed to be?”
As I asked the question, I even confused myself. Billy kept right on rolling.

“The system may grind them down but I don’t use the system,” he said. “I’m not sure about you but I get all these big books and binders with regulations.”

“I get them too,” I said.

“I never open them,” he said.

I was relieved. I was worried I was simply lazy.

“Once you decide to go down the route of Gardiners or Purkey and Novak with invitational leadership if I saw something in the forward of the book or if I saw something there that mean something in the book I would read it. And then you get used to saying ‘You know, we can do this’ and why not do our own research so we brought someone in from Queen’s. This one fellow from Queen’s Belfast was doing work on fetal movements and the reasons kids develop autism. We’ve got all sorts of wee programs running at the school.”

The Games of Heritage and Language

The games of the Gaelic Athletic Association are more than pastimes in Ireland. To many they represent one side of the Catholic/Protestant, Republican/Loyalist divide. Billy had introduced it at East Belfast. Gaelic games represented history and tradition athletically and politically as they represented defiance to the British who tried to ban it. The first “Bloody Sunday” took place at Croke Park; the hallowed home of the GAA where British soldiers opened fire on the crowd attending a match killing 14 in retaliation for the killing of 14 British soldiers by the IRA. The games were more than games. They represented so much more. GAA games were Catholic, Republican, and fiercely independent. Very unwelcome indeed in Loyalist East Belfast. Billy had introduced them to East Belfast Primary and I wanted to know more.
“You were telling me about bringing GAA and the Irish language into the school and there was a lot of opposition,” I said.

“The Irish language could have never worked,” he said.

“But you tried it?” I asked.

“It got caught up in the political thing with the big political parties,” he said.

“What was the point of it?” I asked. “Why try?”

“Well it’s our language,” he said. “I would be from the unionist tradition you know. If you said to me ‘what’s your nationality?’ and I’d say British. You say to someone else and they’d say Irish. You say to someone else and they’d say Northern Irish. There’s a poll out now that is a reflection of how people are changing.”

I had listened to the radio in the car on the way to Billy’s house which reported that 48% of the people in Northern Ireland consider themselves Irish, 39% consider themselves British, and the rest consider themselves Northern Irish. Billy linked the Irish language to Sein Fein.

“If Sein Fein didn’t use Irish as a political tool you’d have found the Irish language in schools now,” he said. “People have an interest in it, an interest in what’s going on. Prisoners, a lot of them learn to speak Irish in jail. A lot of the prisoners took it upon themselves to learn what their history was. It was the same with the GAA. Lord Carson was big into GAA at Trinity Dublin. Nobody believes you when you tell them. The police play GAA now. The army plays. You start to see the barriers broken down.”

Many of the teams from Northern Ireland had done well in GAA competitions in recent years. The Fermanagh team having made it to the All-Ireland finals a few years prior. Despite being a self-professed rugby fanatic his enthusiasm for the Irish national games was obvious.
Two Communities

“I remember friends wouldn’t talk to me because we were reaching out to people of different faiths. Catholics. Protestant people stopped being my friend and have never spoken to me since. It’s a strange sort of scenario that you can’t disagree with someone even from a moral, philosophical perspective without being so deeply hurt that you’re a traitor to your side,” he said.

“My uncle, my granny’s brother Bill, moved to Chicago to live. I remember my granny was in an old person’s home in Portadown. An old standard bog-Prod she was. She was deaf as a post. All these people were sitting there one day when I was visiting and she pointed out a man on the other side of the room and said ‘You know that man’s a Catholic but you know he’s not a bad man. Him and I talk’ she said. And then she said ‘You know I miss my brother Bill.’ I said ‘Do you granny?’ and she said ‘yes.’ He left Ireland in something like 1915 or 1916. I said ‘Why’d he go to America?’ and she said, ‘I couldn’t tell ya.’ Never said a thing. An hour later when everybody cleared away she leaned in to me and said ‘Bill married a Catholic.’ That was the 1990s and he had been gone since 1916 and it still had to be whispered. I find that amazing. Once you start to look at the reasons why things are the way they are the potential for anything lies before you because you can decide you’re going to be a bigot or you can decide it’s socially acceptable to move into this corner or you can change it.”

I reflected on the inviting notion of intentionality. Making the conscious decision to do something on purpose for purposes which are defendable. Billy had grown up in an environment in which it was easy to hate those from the other community. Not only did he decide not to simply and easily hate but as a leader he invited others to do the same.
“The strange thing is,” he said, “I’ve met hundreds of people who are definitely not affected by the struggles here. They’re not bigots. They’re not sectarian. I can’t figure out why they’re not affected but they definitely made a decision along the way that they were intentionally going to be different and then it just collectively grew out of their family and never became an issue. That’s a group that needs some work to look at why they became that way.”

“That’s appreciative thinking,” I said. “Let’s not focus attention on the paramilitaries but look at the people here who actually want to do good things.”

“As soon as you say ‘two communities’ here…”

“You’ve already made the divide,” I said.

“You divide straight away. There are people here from all over Europe, Arica, so there are far more than two communities.”

**A Member of the British Empire**

Billy continued to talk about the influential people in his life, mentors, and his staff until I brought up the MBE that was conferred upon him by Queen Elizabeth the previous summer.

“It’s quite interesting because I would not be a great royalist,” he said. “I think actually it was someone in the Department of Education who put my name forward. It was really affirmation for the school. That was one of the reasons why I accepted it. We sort of used it for our own advantage because it said to the staff that you’re being rewarded for all the chances we’d taken together. They were as pleased as punch.”

Though given individually, Billy immediately credited everyone else with the award and remarked on the impact it could make in affirming the politically challenging invitational stance they had adopted rather than regarding it as a congratulatory award.
“All the different schools that I’ve been in, all the different chief officers I’d worked for, they all sent their congratulations. It was a way of saying ‘we recognize from outside that there is something going on at your school and it’s you as the leader that made the difference.’ You know from inside however that it’s impossible unless the staff will come with you.”

Despite the award and the accolades heaped upon Billy as an individual he continued to differ to his staff as the reasons why they were able to accomplish anything. Leadership galvanized the staff together in their pursuit of the creation of an inviting school. I pointed this out to him. He stumbled with his response.

“It’s very hard to…” he started. “When you’re asked…”

He paused as he searched for the right words to explain before referring to his conversation with the Queen.

“The Queen was asking about the school and the work we were doing and I was starting to tell her and then she got quite into it and started asking more,” he said.

“What did you tell her when she asked?”

“About the cross-community work and she was quite interested in that. She asked if we had both Protestants and Catholics in the school. She said ‘The situation over there…’ she said ‘over there.’ ‘…it seems to be settling.’ I said that it was.”

Though I would have liked to hear more about his conversation with the Queen, as surreal as it seemed to me, Billy turned the conversation back to his students at East Belfast and one student’s reaction to his MBE in particular.

“A lovely wee boy came into me one day to leave me a box of sweets. Last thing I needed…” he laughed. “So he said ‘Mr. Tate, I’m delighted that you got the MBE.’ Another wee boy thought I was in the war because I got a medal. You get a medal if you
fight in a war he thought. We got a wee laugh and it lifted the spirit of the staff. There’s no two ways about it. I’ve received awards before but it’s always a team thing. I don’t know about you but every year we can nominate teachers for “teacher of the year” awards but I’m not able to cope with that well. How can we put one name forward and not ten? I think for me it’s just been the cross-community sort of things I’ve been involved with. Taking a chance. Being involved with schools in the Republic. Schools in England. That sort of thing. It’s strange now though because I can have my daughter married now in St. Paul’s Cathedral. My daughter thinks that is absolutely brilliant.”

“Because of the MBE?” I asked.

“You can probably graze your sheep in certain fields,” he laughed. “It’s amazing. There’s this big book of rules and regulations about it. It’s never been opened I have to tell you.”

The reality of Billy’s situation was ever-present in the bedroom as we talked. He knew that he might never leave there again.

“My brother was asking who gets the medal when I die. You can order smaller ones and have them framed so I did and I’ll give each one to my children. My wife gets the real one. When she dies then it goes to my oldest boy. It’s interesting because it used to be that no one in schools would have been considered for anything like this. That’s one thing Tony Blair made a difference in. Now you’ll find that it is more chalk faces and classroom teachers getting these distinctions. It used to be that the head of the Civil Service got one automatically but now that’s not the case. You have to earn it. You don’t get it automatically. That’s something the staff are quite proud of,” he smiled.

“Around us there are a few posh schools,” he said. “Staff were saying that it will be great to run into some of those staff at the next course and say that they’ve got an
MBE at their school. It was a good time. A few bottles of champagne and a few chocolates. Some good fun.”

I would similarly not consider myself a royalist but I couldn’t help turning the conversation back to meeting the Queen. Beyond the mere celebrity factor, her image was on our money.

“The Queen was nice was she?” I asked.

“I’ve met her a few times before,” Billy said. “Up in Armagh I’d met her some years ago. Then my wife wanted to meet her so we got an invitation to the royal garden party at the castle.”

Billy could see the look on my face when as he spoke plainly about royal invitations and meeting the Queen of England. She was on our money and her framed portraits hung on the walls of our public institutions around the country. To me she was a figurehead; an image of our colonial past and constitutional monarchy. To Billy she was someone he’s met and interacted with. He attempted to put things into context.

“My father worked in a factory,” he said. “My mother cleaned floors at our local school. We’d had no hot water in our house, no sheets on the bed for ten of us. Total poverty. Absolute total poverty. And standing in the Long Gallery at Buckingham Palace a man said to me ‘Have you come far?’ and I said yes. We’d no hot water in the house, no sheets on the bed and I look at this painting that’s worth millions of pounds and I’d say yes: I’ve come far. He looked at me like I was crazy so I had a good laugh and walked off. So my wife and I went to the garden party and we had to stand in line for three hours because she didn’t want to miss the opportunity to meet the Queen. I was inside eating sticky buns,” he laughed.

I didn’t want to interrupt his story, so I tried to laugh without making a sound.
My body simply shook as I smiled.

“Great sticky buns,” he said.

“I would hope they would be at the palace,” I said. “So your wife eventually met Queen Elizabeth?”

“She’s very small. Very tiny lady, the Queen. Her husband is small as well,” he said. Billy was an imposing figure himself as a large rugby man. I could see how others could appear small in comparison.

“He looks tall,” I offered, referring to Prince Philip.

“Beside her yes,” he said. “Anyone would. She’s very thin. So we invited Prince Charles to come over to East Belfast later in the year…”

“Why not?” I thought. Billy was not shy. I suspected it was because of his pride in his school, staff, and students.

“It’s about being inviting,” he said. “Sending out invitations is a part of that. He’ll probably come over to visit later in the year. The Queen will probably visit the President of Ireland and that will be her first visit to Ireland.”

As it turned out Billy was prophetic. The Queen did indeed visit the Republic of Ireland greeted by President McAleese as she walked off the plane in May of 2011. It was the first visit to the Republic by a Queen and the first time a British Monarch had set foot on Irish soil since her grandfather had one hundred years earlier in 1911 when the entire island was still under British rule.

“I’m sure if she does, we will get an invitation to attend from the McAlesses but somebody from school will go and take them up on it. I will make sure of that before I die. Mary McAleese did invite me to her installation as President of Ireland.”

I asked him what that was like to attend such a formal and prestigious ceremony.
“Everyone was running around spick and span and her dad, he’s from Rostrevor, he was walking around in his slippers! I laughed. He was so laid back and relaxed. To me it was very Irish. Like a family day except there were hundreds and hundreds of people there.”

**Welcoming the President of Ireland**

Billy’s mention of the McAleeses turned his thoughts back to East Belfast and their recent visit to the staunchly unionist housing estate.

“It was a great affirmation for our school to have the President of Ireland there. She had tried to go to another school of a friend of mine as well but they just about wrecked the place in protest,” he said. “You know the paramilitary hotheads.”

“They didn’t do that at East Belfast?” I asked.

“No. Remember that website that they started?” he asked, referring to the website that was calling for his dismissal over his introduction of GAA at the school. “They put up stickers and flags on the poll and there was going to be a protest at the school.”

I remembered when this was happening months before. Billy and I had been corresponding frequently about the upcoming visit of the President of Ireland and the difficulties that presented in the community. He told me about the paramilitary threats and the installation of paramilitary flags on the polls around the neighbourhood in protest and intimidation. I asked him what he was going to do at the time. He told me he planned on inviting them into the school to talk. I asked if he was worried about having them in the school and he said he would be more worried about them standing at the gates.

“I invited them in and they were still going to protest. So I called for the head of the UDA and he came down to the school. I asked for his help with these boys. He says to me ‘Billy, do you know what it is? They feel that they keep losing every time they get
involved with you. You don’t give them any time or space. They never win an argument.’ I said ‘How did you become the Godfather of Loyalism when you’re telling me that a fat man nearly 60 years of age is frightening all the terrorists?’ He laughed and asked me when the event for the McAleeses was. I told him and he told me that there would not be any bother and there wasn’t.”

I had similar questions about how Billy, a school principal from a housing estate could withstand the intimidation of local paramilitary organizations. He shared his secret.

“Martin McAleese,” he said, referring to the President’s husband. “They play golf together.”

“The husband of the President of the Republic of Ireland and the head of the Ulster Defense Association play golf together?” I said.

Martin McAleese, a dentist and husband of Mary McAlesse, had played a large role in negotiating between the IRA and Loyalist paramilitary groups regarding the decommissioning of weapons and facilitating peace talks. With family connections and a background in Northern Ireland and the Republic he had worked with both groups toward the Good Friday agreement and gained the respect and trust of both in the process.

“Martin had been working with them,” Billy said. “Working with different groups in different places and that was when everybody said it couldn’t be done. If you want something you have to get involved to make a difference. You have to do this. Martin knew that.”

“So the leadership of the two groups are largely on board,” I asked. “But the others within the communities on both sides are still rejecting it essentially?”

“Their status has disappeared in the power structure,” he said referring to the political influence of the paramilitary groups. “The Provos (Provisional IRA) are quite
deep thinking. They would have a different type of person involved in terrorism than the loyalist para groups. Loyalists were rejected by their own people largely speaking. Most loyalists are not into terrorism. It’s just not something they’re interested in. They’re having a lot of problems now because they’re not very well educated so now that their power is diminished they don’t know what to do so they’re grasping at straws to stay relevant and influential.”

Billy had been a part of some of the peace negotiations leading up to the Good Friday Agreement. Not the negotiations or high profile work but rather as an educator the details of the language of the documents. He illustrated his point about the education level of the loyalist groups by referring to a document he was working on.

“We were proofreading a document during the peace process,” he said. “You give these documents to some of the heads of the groups, some top civil servants giving documents to the heads of paramilitary groups and they’d have a reading and they couldn’t understand why these boys didn’t want to do a deal. They just didn’t understand what they were doing. If the documents were in simple, plain, straightforward language they would have understood and once they started to break those barriers down they started to get closer to peace. Martin McAleese had done more than anyone to get away from the gun and to bring the communities closer together. It was the perfect role because Martin was both a dentist and an accountant—both involve extracting your money—and he’s done fantastic things.”

The more I talked to Billy the more he was ready to give credit and accolades to others. While he was humble about his participation in these important historical moments in Northern Irish history he was continually asked to be part of committees and high profile groups.
“I remember getting an invitation to meet John Major at Hillsborough,” he said, referring to the former Prime Minister of the United Kingdom. “It was a nighttime thing and I was asked to represent the educational perspective. They bring you down because of the mortar and you can’t bring your car so you have to go by bus. A man named Gerry Wilson was there. His daughter had been killed by a bomb. There was this barman there who was in the UVF and had gone in and shot six or seven people during the World Cup three World Cups ago. Just went in and shot these Catholic people dead. This guy was a bundle of nerves. It ruined his life. So you were meeting all these people whose lives had changed dramatically and they were all there because they were using it for the positive side.”

**Leading Changed Hearts and Minds**

Billy was interested in talking about the changes he had seen in the past few years after decades of bloodshed, war, and fear. Despite the stories he could tell about friends and neighbours being gunned down or blown up there was a sense of positivity in the tales that a new dawn was on the horizon which he had a hand in from the beginning. As he reflected from the four walls of his bedroom at the end of his life he filled with pride as he talked about people who had every reason to continue to hate who had decided not to. Billy had faith in the next generation and attempted to instill that in others starting with East Belfast Primary.

“The man down the end of the road, a Catholic man, a soldier, ended up coming to speak at our church,” he continued. “That just never happened before. He was such a fantastic guy. They had shot his son dead. For no reason other than the fact he was Catholic and his dad was a soldier. There was a movement started. There are certain things that happened and principals of schools can very easily take the easy road as most
did. They never seem to take the challenging route. You can count on one hand the number that were willing to take big risks but that’s changing.”

He started naming principals who in his estimation were taking up the challenge to stop the acceptance of the status quo and were leading their schools to embrace peace between communities. The principal of Ballameia Academy, the school along the Antrim Road, the principal in Kilkeel.

“They’re doing fantastic things,” Billy said, full of pride. “The work they’re doing is built on the strength of getting to know each other and taking a chance together. There’s a friend of mine in Armagh and she’s done some remarkable things just in her own way because she’s from the area and she’s now putting something back into the area. I just think what is happening now is phenomenal.”

Billy’s work and his recognition for it had highlighted to others the fact that it was possible to do things that many thought was not possible. Others have begun to take up the challenge and with each new success more are inspired to continue to try. Leading intentionally inviting educational lives requires courage, perhaps most importantly in Northern Ireland, and those courageous success stories reveal communities who are more willing to move on than many had ever thought.

**Family Matters**

The phone beside Billy’s bed rang.

“It’s my wife,” he said as I nodded for him to take it. I indicated my willingness to leave the room for some privacy but Billy put up his hand to say no. After a few moments, he hung up and let out a large sigh.

“She’s not coping well,” he said. “Last week she took time off. She’s never taken time off before. She’s finding it difficult. She wasn’t good this morning when she left
for work. A couple of months will make a difference,” he said referring to the time after his death.

“We’re lucky that we have our children,” he continued. “She’s a very quiet woman. Very quiet. A real brain box though. She’s got the brains and I’ve got the chat. I’m not sure you know someone until you realize you don’t have much time left together. I’ve a month gone since the diagnosis so I’ve likely only got a month or two left…” he said, allowing his words to trail off into silence. “I can’t stand up anymore because of the cancer. It’s crazy because I don’t feel that sick. There’s a lot of pain but pain’s relative. She had four children. That’s real pain. We’ve always been real close you know, friendship wise. I think that will probably hit her really hard. Her mom and dad aren’t well at the moment either and her brother’s wife has to have a brain operation and she’s touch and go so she’s got a lot on the go at the moment. The kids are going through quite a time.”

The closer death seemed to become the more Billy concerned himself with others and their well-being. There were things you could do something about and things you could not. Billy knew his time remaining was fleeting so he chose to prioritize others as he had his whole life as an educator.

“Wouldn’t it be worse if you had any regrets in life?” he asked. “My doctor, poor doctor, came out to see me here the other day and he was just embarrassed. I think he felt guilty that they didn’t catch this in me earlier whereas I think it was simply a preexisting condition. Don’t worry about it. He’s called out to see me a few times now. It is lovely now being able to build upon the relationships, especially with my family.”

Billy spoke about the importance of maintaining balance despite the immense demands of the role.
“What you’re doing at your school, leading as invitationally as possible, is good because it will enhance your home life and the quality of what you do for your family. That’s the key bit—if you can make it work at home and school—and sometimes it’s very hard. If you’re like me you could probably sit down and study for hours at a time without moving and look up and it’s 3 o’clock in the morning.”

I thought about the many times my wife had made her way downstairs in the middle of the night, squinting into the light to ask me when I was coming to bed as the hours slipped away.

Living Educationally, Dying Educationally

We talked about Billy’s life as a teacher, a principal, a husband, and a father. As we sat in that bedroom, the conversation inevitably turned to the finality of life.

“I find it hard to remember what the children looked like when they were one, two, or three years old,” he said. “I find it hard to remember what my parents look like. My sister’s nearly blind and she says that she tries to visualize situations and their faces appear.”

We sat silently for what seemed like a long time.

“The one thing is that my children aren’t gone before me,” he said. “I don’t know how I would have coped with that.”

“A family in my community lost their two year old a year ago. It’s not the way it’s supposed to happen,” I said. My ability to change the subject left a lot to be desired.

Billy smiled from the bed.

“We have burdens to carry for others that a qualifications program can never prepare you for don’t we?” he said.
Billy shared the fact that he brought his children to school with him as they grew older so they could help in classrooms. Even though they couldn’t be paid they understood the importance of living educationally.

“My children were always very good at mixing with people,” he said. “That’s because we always had people all around us. That’s what I find difficult about being ill. I miss the bobble and the craic (conversation).”

Billy’s voice trailed off as he became quiet. He took a deep breath and readjusted himself on the bed. I tried to think of something to say to until Billy broke the silence. He had been thinking about his last trip to the school.

“The day I went up to the school for the last time to give my keys in the noise got me,” he said. “After being here for a number of months laying quiet I went in and heard all the high pitched voices and thought ‘save me!’ I wasn’t used to it. It made me sad.”

Billy spoke about minor every day memories and unforgettable moments and tragedies equally without discernible distinction, knowing they all contribute to the school and culture. He laughed about a nursery student who called him “Mrs. Tate” for years because he was confused with his wife. He talked about a family whose daughter drowned in a pool and how the community rallied around them. He talked about conversations with parents about their hopes for their children, the school, and the community.

“That’s the wee bit you miss. Parents telling you what’s going on. Sharing their happiness and joy. Mostly their insecurities,” he laughed. “It’s funny because a lot of times people come in hoping that you’ll have the five words that will change their life but you don’t.”
“I think what we have to tell them is a lot harder,” I offered. “We don’t have the right answer or the perfect recipe. It’s about people investing in relationships. That’s a lot harder to do and for the most part, people don’t know how to do it.”

“You just go through life and there’s no blueprint. There are a lot of opportunities that present themselves and you just take them. The most challenging part of the journey is now,” Billy said, referring to the end of his life. He not only appeared comfortable with the end of his life but excited to find out more as time progressed: how it would happen, what his family would do and if there was anything beyond the expiration of his body.

“I’d have loved to go back to school to study,” he said. Billy had often talked with me about my doctoral work with a twinge of regret and admiration. He had always wanted to challenge himself academically and was interested in the advanced degree but the timing of his career and illness conspired against him. Despite a serene approach to the end of his life, even Billy looked back with regret about what more he could have accomplished and inspired others to as well.

“I’d have loved to get back to East Belfast again as well,” he said. “I asked the doctor about getting me back there in a wheelchair and he said ‘absolutely no way.’ All of a sudden I realized that door in life was completely closed and because I’m away from school and can’t change things anymore and shouldn’t anyway because it’s not fair to those people who are left in charge. It’s their role now to make a difference. I realize that shutter has come down now and a career finishing. But that’s the most exciting part.”

I furled my eyebrows and shook my head in confusion. Someone at the end of their life should not be looking forward to dying should they? I naively assumed that no one actually wanted to die.
“That’s the most exciting part?” I asked.

Billy was not only unafraid of death; he looked at it as a perennial scholar interested in each instance until the very end. Until that moment there was still more to learn, model and look forward to. Billy had committed his life to living educationally. From the confines of his bed he committed to dying educationally as well.

“Yes,” he said, “the most exciting part. You’re not quite sure. That’s exciting. You know when you’re going on holiday and you’ve gone to the same place three years running so it holds no surprises for you? This is brilliant because I have no idea what is going to happen.”

I had committed to intentionally living and leading an educationally inviting life. I did not expect to meet an inviting leader who was also committed to dying in an inviting educational way. As Billy faced the end of his life with dignity and humanity he maintained and modeled his curiosity and love of learning.

“The other night I was hallucinating because of the tablets I’m taking,” he said. “And I was hallucinating about typing. I was half awake, half asleep at the time like I was aware I was doing something odd from a distance but couldn’t stop myself from doing it. I was hallucinating that I was typing. I could feel the buttons on the key pad. I don’t know what was going through my head but I knew I had to get it down on paper.”

Despite Billy’s offer of having his daughter make us food or valiantly fighting to remain lucid despite the medication and drowsiness I knew my time with him was coming to an end. I knew I would have to leave our conversation but I also recognized it as my last one with Billy. I started to pack up my bag.

“I remember my mother saying to me when she was on her death bed ‘I’ll see you in heaven’ and my father was the same. So it’s a strange scenario that my wife doesn’t
believe in God,” he said. “No time for religion.”

I could understand how the merits of a faith in religion would be eroded in Northern Ireland as simply identifiers of the enemy and perpetuation of stereotypes. Despite what was happening with the paramilitaries and provos outside the safety of his bedroom Billy hoped for the comfort faith would provide to his wife in the days and weeks after his death.

“It’s so difficult for me to cope with that,” he said. “Hopefully she’ll come back around again. The children are that way inclined as well. No interest in any sort of spirituality really so it’s difficult. But I do have faith so sit tight and you’ll never know what happens, what comes of it,” he said hopefully.

I smiled and thanked him for his time, his mentorship, and for his willingness to share it with me throughout our years of conversation. I shared my admiration for the many accomplishments throughout his inviting educational life from formal awards to minor every day realities as well as the way he was approaching the end of his life. I marveled at his embracement of the end of life and his wonder at the mysteries yet to be revealed.

“I still think this is exciting,” he said with a large smile. “There is something nice about the roll of the dice isn’t there? There’s that excitement.”

I smiled back and reached to embrace his extended hand.

“Life has to be exciting and this is the final run through now,” he said as he firmly squeezed my hand and winked.

I gathered my belongings and walked out of his bedroom, closing the door behind me. Billy’s daughter rose from the couch in the living room and walked toward the door to meet me.
“Did you get what you were looking for?” she asked.

I smiled and thanked her for allowing me to share time with her father, especially given how precious his time is.

The driveway pebbles crunched under the weight of the rental car as I backed out of Billy’s driveway onto the road. I pulled away, adjusting my rear view mirror while his house shrunk in the distance behind me careful of the dangerous corner up ahead.

An Invitation to East Belfast Primary

Though the Good Friday agreement was over twelve years old and paramilitary groups had their weapons officially decommissioned tensions continued to simmer throughout Northern Ireland. Though little coverage of minor events were known of outside Ireland and the UK, traditional hatreds persisted as stories of shootings, bombings, and threats increased. In the weeks leading up to my visit two police officers had been shot and a car bomb had exploded further fueling skepticism about the enduring impact of the fragile peace.

My mother-in-law was staying with my wife and daughter at home in Canada while I was in Northern Ireland. I had connected with them after my time with Billy as I couldn’t wait to share the stories of hope, optimism, and encouragement. I also yearned for my family after spending so much time with Billy discussing the inevitability of the end of life and the importance of family in the process. I wanted to make sure my wife and daughter were well. I wanted to tell them how much I loved and missed them. I wanted them to tell me the same thing. I longed to get home to them again but I looked forward to the opportunity to visit the school Billy had spent so much time at.

I thought I had been clear when I left about the reason for my journey and where I was heading exactly but I may not have been clear about the details of location. My wife,
a Belfast girl herself, called as I was driving to ask me where exactly the school was located. When I told her, she sounded unsure of the wisdom.

“Are you sure this is a good idea?” she asked.

I was amused by the sudden trepidation and excited by the idea that I was about to go somewhere I apparently was not supposed to be.

“I’ll be fine,” I said. “I’m Canadian. I’ll play up my Canadian accent.”

“You carry an Irish passport,” my wife replied.

“I’m sure no one is going to ask me for my passport,” I laughed.

“Your name is ‘Brendan’. You can’t get much more Irish Catholic than that,” she said.

“Listen to this: ‘out and about the house’,” I laughed, embellishing my Canadian pronunciation.

While I assured her that I would be fine that I had been invited and was merely interested in visiting the primary school, I began to feel the butterflies in my stomach as well. I had visited many dangerous places from shanty towns in Caracas Venezuela, to the Kibera slum in Nairobi, Kenya, but in each situation I was so obviously an outsider and was welcomed as a stranger. In Belfast, I was not as sure I’d be accepted as simply.

I entered the address into my navigation system and followed the directions into Belfast. I trusted that each turn was taking me closer to the school as I approached the city but the GPS was not required for me to know when I was in a loyalist part of town. Union jacks and the red hand of Ulster flags flapped from lamp poles and front porches of two-up, two-down row houses. Street curbs were painted red, white, and blue, and the entrance to row houses were marked with murals painted onto the brick exterior of the end of row houses. Larger than life images of men in balaclavas carrying machine guns
marked the boundaries with pride and prejudice. Police stations hid behind twenty foot high barbed wire fences. As an Irish-Canadian Catholic I was cognizant of being somewhere I had never been before. Perhaps somewhere, as my mother-in-law suggested, I had no business being. I felt like Charles Marlow driving my ferry-boat into the heart of the Congo.

The efficiency of my GPS and my reluctance to be late for the agreed time brought me to East Belfast Primary early. I pulled the rental car up in front of the school and parked on the road across the street. A brick wall and wire fence separated the painted school yard from the road. I walked through the gate, hesitating at the entrance, unsure of whether or not to proceed, until I saw the front doors open and a woman emerge from within.

“Brendan?” she asked.

“I’m sorry I’m early,” I said. “I didn’t know how long it would take for me to get here.”

“Not at all,” she said with a smile. “We’re glad you’re here. I’m Margaret Tanner.” She extended her hand graciously with a smile. “It’s a pleasure to meet you. Welcome to East Belfast Primary.”

Margaret held the door open for me as I walked into the school. I stood in the main entranceway and glanced up and down the bright yellow hallway. Student poetry hung outside a classroom next to the office. I read the different haikus and enjoyed the illustrations. Students walked by in sharp uniforms with a smile and a warm greeting. I immediately felt at home amongst student work and busy classrooms, leaving any trepidation back in the parked rental car.
Margaret ushered me down the hall and into Billy’s office which she was occupying since taking over for him.

Richard rose from the couch with an extended hand as I walked into the room.

“It’s a pleasure to meet you,” he said. “I’ve heard a lot about you from Billy.”

Billy had spoken fondly of Richard, the Director of the Board of Governors. Billy had immense respect for Richard’s inviting perspective and felt he had found a kindred spirit of openness and understanding within the community. He was a Presbyterian Minister at the local church born to a preacher father in the former Rhodesia, now Zimbabwe, and raised within the East Belfast community. Perhaps the most surprising thing about Richard was that he was an ardent Celtic supporter. When John told me I would be meeting him I asked about his preference for the staunchly republican-supported Glasgow football team.

“I think he likes them just because it is contrarian,” Billy said. “He doesn’t shy away from controversy. He wants to challenge accepted conventions and get people to question the norm. I think he ended up just liking them along the way.”

Billy had confessed to me earlier that he had been raised by his community to understand that he was to beat anyone wearing a Celtic jersey. Wearing a Celtic jersey in East Belfast courted enough controversy. The local minister doing so even more so.

I was eager to speak with them about the school from their perspective. My impression of Billy’s invitational approach to leadership was formed through our conversations and the stories he shared with me. Arriving at his school when he was no longer there, I wondered if his school, staff, students, and successor would support this impression or if they would reveal a different perspective.
“We should get going,” Margaret said as she looked at her watch. “Everyone will be waiting.”

“Everyone?” I asked.

“Staff,” she replied. “They’re in the staff room waiting to meet you.”

Richard held the door open as we walked back into the hallway. I followed Margaret down the hall and through the staffroom door.

**Pot Luck Lunch**

Margaret and Richard walked in before me and as I entered the staff room the entire room became silent as I felt everyone’s eyes fix on me. What must have been close to the entire staff were packed into the staff room hugging the walls where chairs were placed neatly facing the large table dominating the middle of the room. Though the room was filled, the amount of food on the large table looked enough to feed twice as many.

“This is Brendan,” Margaret said to the hushed crowd. “He’s from Canada and he’s here to find out more about our school.”

Everyone was looking at me with wide smiles on their faces as if to say “we’re glad you’re here.” I mustered up the best overwhelmed smile I could in return.

“Perhaps you’d like to say something…” Margaret said.

I was used to speaking in public as a school principal, but suddenly felt completely unprepared. I stumbled through a brief hello and introduction of myself and explained that I was visiting East Belfast because I had heard such good things about the school, their invitational approach to education, and the leadership of Billy. I told them that I looked forward to spending some time with them in their classrooms or speaking personally with them if they would be up for it. I found myself rambling.
“We’re glad you’re here,” someone said from the crowd which met with warm hearty laughter from the group.

Margaret made way for a staff member to come forward. She shook my hand and welcomed me to East Belfast Primary and handed me a book.

“On behalf of our staff, we’d like you to have this book as a token of our welcome and hope that you will remember your time here fondly,” she said.

A gift? I had hoped to quietly touch base with staff and students over a few days and not interrupt their regular routines in any way. I found myself standing in the staff room in front of a room full of smiling strangers accepting gifts like a visiting dignitary.

I looked at the book in my hands. “A History of East Belfast Park” it was called. I held it up for everyone to see with thanks.

“Well,” Richard said, “I see a lot of food there not being eaten…” The laughter erupted again.

The food on the table was brought in by members of staff who had organized themselves as to who would provide what dish in anticipation of my arrival. This large pot luck spread stretched from one end of a board room sized table to the other. Sandwiches, cheese, meatballs, sausages, salads, and pastries, cake and my Northern Irish favourite—bannafi pie—made up a lunchtime feast provided by the welcoming staff. As a staff member came up to introduce herself as I began to quickly leaf through the book, Richard interrupted and informed me that if I didn’t start to eat, everyone would wait for me. I put the book down, picked up a plate, and others joined in behind me.

As soon as the formalities of introductions, welcome, and book presentations were over, I found myself conversing easily with various members of staff from teachers to educational assistants to the custodian to the office staff. I was asked a lot of questions
about myself and my school which I answered happily but I was more interested in them, their school, and the influence of Billy on the school. I found out about the dissolving borders projects the grade 6 students were working on as they connected regularly with grade 6s in Catholic schools in the republic. I listened to teachers talk casually about the Irish dancing lessons students were participating in or the hurling instruction students received in gym class as if it were a normal part of all schools. I knew how difficult the implementation of these programs had been not only for the community but for some teachers particularly who were uncomfortable deviating from the traditional Protestant loyalist stance. If I had not known about these hurdles however I would never have guessed it by the way in which teachers talked about it.

**Meet the New Boss, Same as the Old Boss?**

Richard and I walked back down the hallway toward the principal’s office. He explained the structure of the school, how community and church representatives sit on the board which is responsible for hiring of staff and overall governance but that the vision of the school and the articulation of that vision is the role of the principal. In that regard Billy had changed the school from one in which parents were kept at a distance to one which valued the contribution of the parent community and worked toward partnership with them. In the thirteen years Richard had been involved in the school he had witnessed incredible change since Billy began as principal.

“Billy brought us into the 20th and now 21st century way of thinking,” Margaret said. “Primary movement, DeBono’s thinking hats, Gardner, we’ve moved into more reflective practice that has theoretical foundations. We connected with more schools—schools like us and schools in the Republic. He brought in a lot. Education is his life so he brought us into contact with a lot of ideas and practices we’d never heard about.”
While Margaret reflected on the changes Billy brought to East Belfast pedagogically, Richard reflected on the decision to hire Billy years earlier as a conscious decision to attempt to ease tensions and create harmony in the community.

“One of the real problems we had when Billy first came was paramilitary groups. There were several families who had children at the school who were trying to make the school reflective of their politics and views and this was causing some real divisions. We certainly talked about it at the Board of Governors level because we wanted someone who would take on that situation and Billy certainly did that. That did not make him popular in certain quarters in the community then and even now.”

“How did he deal with these problems?” I asked.

“Through his character,” Richard replied.

“His character,” I repeated.

“Well that and his presence. He is a very big man physically as you know. He carries a presence,” he said.

I thought back to the man I spoke with over days in his house as he laid prone in his bed grunting in pain as he reached for the plastic cup filled with water resting on the night stand. Even from beneath crumbled bed sheets in a darkened bedroom I had to agree that he did have presence.

“He came from the country and he kind of brought a country attitude to the school,” Richard continued, referring to Aughnacloy, Co. Tyrone. “He reached across the community with the McAleese’s coming to the school though some people did take him off their Christmas card list. But he was fair. He had connections with people on the other side and people in the loyalist paramilitary groups in and around the schools and he got them on board. He believed in talking to people.”
Margaret nodded her head and smiled.

“He would always make time for people. If someone came in here to this office they wouldn’t leave in less than two hours.”

Margaret laughed for a moment but her mood quickly turned somber. Whenever the paramilitary groups were mentioned she appeared to find it difficult to smile.

“I do know one or two of the parents who were connected to the paras in the neighbourhood and are possibly still connected and they would come in here into this office and sit down and chat with him. I’m not talking about being aggressive. They just came in here and talked.”

“They would want their children to have a better life than them,” Richard said. “I think many of them see education as a way to better their children. Some of the loyalist paramilitaries saw the direction their lives had gone and they didn’t want their children to go down there and they see education as a way forward. Billy would have encouraged them in that way. In the start there were some groups who were very disruptive. Especially some of the boys. He would have taken them out of class and taught them in here. The problem is when they leave here and go into secondary school.”

**Home/School Partnership?**

The school that Billy took over as principal was one which was firmly entrenched in traditional loyalist dogma which influenced the larger community and the school policies and programs. Billy drove into a segregated Protestant loyalist neighbourhood heavily influenced by the paramilitary groups. The community was both staunchly loyalist Protestant and fervently anti-republican Catholic. Unionist flags marked the boundaries of the housing estate and the politics of its inhabitants. When Billy walked into the school for the first time, he found teachers who were used to toeing the political
line and enduring threats and intimidation from parents connected to paramilitaries. At East Belfast Primary, the notion of an irate parent had a somewhat sinister connotation as threats were often made by people who had a history of carrying them out. Billy brought with him a track record of educational leadership which embraced an inviting perspective and involved cross-border and cross-community relationships. It would have been easy to adopt the community’s politics of segregation and lead the school from this perspective but Billy cared about each student and was hopeful for a better future, one which was inclusive and inviting. I asked about the programs and policies he developed and implemented under his leadership. The subject of his controversial introduction of Gaelic games and the Irish language quickly came up.

“Well he did have the boys doing Gaelic…” Margaret said. Her voice trailed off as if proud of being part of such a bold initiative and hesitant that it was ever a good idea given the political implications and division it caused within the community. Richard sensed her unease.

“It was a program in sports,” he offered to clarify. “They had some of the boys in Gaelic games so they got together with other groups. And it’s…” Richard’s similarly voice trailed off as he found himself cautiously struggling for the words to describe the program. He took a deep breath before continuing.

“A lot of the kids enjoyed it but a lot of the parents thought it was terrible. We had a few situations with some folk and he was helpful in managing it.”

“What was the situation?” I asked.

“There have been many,” he said. “One of the symbols for the paramilitary is ‘For God and Ulster’ and I went into church one night at 6 o’clock and came out at 8 o’clock and there were flags put up all around the community and on the polls on the church
grounds. I said to them that they didn’t have my permission to put the flags up and asked why they were doing it for God and Ulster when they were doing it on church time? They took them down. There was another morning when Billy called me and asked me if I’d seen the flags. I told him that I did. They’d gone up around the community and around the school.”

Billy and I had been in touch about this situation when it was happening via email. The flags were up to intimidate and remind those in the community and Billy particularly that the paramilitaries were in control of the community and deviance from the loyalist paramilitary traditions would result in consequences which would not preclude violence. He told me what he was going to do. Richard continued.

“A reporter from the South Belfast News called him up and asked him about the flags. She was trying to stir up another story of the reemergence of sectarianism and wanted a good quote from Billy. She said ‘Have you any comment on the protest taking place outside your school about children being involved in Gaelic games?’ and Billy said ‘What protest?’ She continued by telling him that she had received an anonymous call telling her that there would be a protest. He said to her ‘I’m looking out the window right now and I don’t see anybody.’ All she could say was ‘Oh.’ We had to contact her to ask her to behave herself,” Richard said. “Billy then got in touch with senior members of the paramilitaries and they said they would sort it out. The flags were all down quickly.”

I thought about the website that had been set up by some parents in the community who were outraged by Billy’s decision to introduce Gaelic games. The comments of hatred and calls for his dismissal littered the web page as parents expressed their concern about the influence on their children and openly dismissed Billy’s attempts to open up the community to games associated with Catholics and the Republic.
“They said this is a Protestant estate,” Richard said. “What are they doing bringing those games in here? But there are increasingly more non-Protestants in this estate than people realize. Billy realized it. A lot of immigrants from Eastern Europe. A lot of Chinese. They’re not even Catholic so there’s a mix in this community. More so than some of the older people in this community would realize.”

“Does it feel like a changing place?” I asked.

“A school in transition,” he said. “We’re proud of where we’re moving. It’s a changing situation.”

Billy had talked about welcoming parents into the school and changing the perception of keeping parents at a distance despite some of the negative interactions staff had had with parents and the threats and intimidation many staff claimed to have felt. He wanted a community feel and knew that involved challenging the staff to embrace and inviting approach and parents to supporting the goals of the school. I asked about some of the community partnership changes since Billy’s arrival.

“There are also the programs that involve parents getting involved to help their children academically,” Richard said. “Billy’s involved the YMCA through the after school club at the other end of the building and that’s been in the last few years.”

Richard and Margaret smiled as they described the re-introduction of Christmas Nativity pageants and school plays which contributed to the community connection which had been lacking before Billy’s arrival. Teachers who were nervous around parents and used to being threatened were not enthusiastic about putting on extra-curricular plays and community events. Billy’s commitment to inviting parent partnership changed the programs which contributed to the creation of an inviting school.

“Billy was good at maintaining the connection with the churches which was a
good thing for the community,” Richard said.

“Do a lot of the children here go to church with their families?” I asked.

“No they don’t go to church necessarily. Quite a lot, a good majority of them would not have any church connection but they would be involved with the youth clubs and some of the organizations in the different churches but this would be an opportunity to get the parents into the churches at all,” he said.

“Did Billy think that was important?” I asked.

“Very,” Richard said. “Having the parents involved in the school and the church was a way for him to connect the communities and further his idea of an inclusive, inviting school. For example there’s a carol service and it’s always held in the Anglican Church because it’s the largest. Billy would get the whole school involved and everyone would come and it would be a big community event.”

**When the President Comes to School**

A local member of parliament or a municipal counselor might make a visit to a school for a variety of reasons such as a photo opportunity in support of public funding, reading with children for political favour, or visiting students who are studying the government in social studies. At St. Stephen’s, we had the mayor visit, both the provincial and federal members of parliament, and each time a visiting politician came to the school to speak with our students about literacy or the government, we publicized the occasion and made it into an event. We have never had the Governor General or the Prime Minister of the country visit the school. For Billy and his staff at East Belfast Primary public recognition for the courageous, inviting work they were involved in garnered the recognition of politicians and leaders in Northern Ireland, the United Kingdom, and the Republic of Ireland. Billy had shared his perspective on the visit of
Mary McAleese, the President of Ireland, to East Belfast Primary. I invited Margaret and Richard to share their thoughts on the presidential visit. They described the on-going relationship that the school had participated in with the president leading up to her visit.

“A lot of us had been down to visit the McAleese’s in Dublin. It was a community effort. There was a bus that went and it had some folks from the community, older folks, and it had representatives from the community. There were teaching assistants, staff, we all went down,” Margaret said. “We went down to Phoenix Park; the president’s house, and she laid on a lunch for us and then one of her Garda showed us around.”

“Why were you invited?” I asked.

“It was through Billy’s connections,” she said. “He wanted to promote our connection between East Belfast Primary and the Republic.”

“There had also been a visit three months earlier,” Richard said. “It was organized by the community here, some folks from my church were involved as well as another group from the lower Ormo area of Belfast which would be a nationalist area of Belfast so that would have been a cross-community initiative. Billy had a big part in organizing that as well.”

“Then there is the dissolving boundaries project we’re involved with. Our Year 5 students had been down to visit the school in the south they are connected with and they all went down to the mansion in Dublin and Mary McAleese had entertained the group so we had this connection.”

Visiting Phoenix Park and being entertained at the president’s mansion in Dublin was one thing but welcoming the President of the Republic in the middle of loyalist East
Belfast was another proposition entirely, one that was not without its detractors and opposition.

“Billy had sent out a lot of invitations,” Margaret said. “There were invitations in the neighbourhood, the Eastern Education Library Board, there were community invitations and there were politicians who were invited. The way we did it was the president expressed her wish that she was really there to see the children and she came with her husband. They came into the hall where the children were waiting. We had some Irish dancing for her and she told them how fabulous they were and that they were the best children in all of Ireland and that was why she had come to see them. She spoke directly to them and she went up to our canteen where all our people who were there with invitations were gathered and they had sandwiches.”

I was interested in the variety of invitations that were sent out which opened the school up to more than the politicians and special guests but also to community members to partake in a unique community event. The more people were invited into the school the more they because aware of the good things that were happening.

“There were a lot of elderly ladies,” Margaret continued. “Some of whom she met on the trip down to Dublin. They were sitting at a table having tea and she just pulled up a chair beside them and talked to them. She’s very personable.”

I remembered Billy’s comments about how easy it is to dislike someone without knowing them but personal connections and relationship fostered understanding and appreciation for one another making it much more difficult to hate. Despite the outreach, investment in relationships and willingness to model invitational leadership by inviting groups together who would not normally be there was a small but vocal minority who
made their displeasure widely known and threatened to disrupt the presidential visit. Instead of preparing for a fight Billy invited those in opposition into the school.

“There was a very senior man in the paramilitary organization that came up here to talk to Billy about the visit,” Margaret said. “Billy brought him into the staff room and some of us were having our lunch. He introduced him to us but we didn’t know who he was.”

“He showed him around the school,” Richard said.

“He invited him in?” I asked.

“That would be par for the course,” Richard laughed. “Billy was very accommodating. Very inviting. But if you tackled him head on he didn’t mess around with you. You know I’ve seen him, people who were not here to talk they were here to confront him, and she’s shown them the door.”

I remembered talking with Billy about his invitational approach as I dealt with a situation at St. Stephen’s. Billy’s example of bringing parents into the school to see the wonderful things that were happening was a great way to diffuse conflict situations and bring people together. If you prepare for a fight you will almost inevitably find yourself in one Billy would say. Expecting the best from people and inviting them closer is a way to deal with difficult situations. However being an inviting leader did not mean being a pushover as Richard mentioned.

“The week before the McAleese’s visit Billy had been ill and left the charge of the school to me to deal with her entourage and her security people came by to see the school and come up with a plan to keep her safe. They were absolutely horrified to know that invitations had been sent out for a specific day and time. They were very fearful. They had very strict instructions as to who was allowed to be there and where because of her
we’ll being. But I think that Billy was a very clever man because he intentionally sent his invitations to the people who would have created the greatest opposition. That diffused the situation. We had no protests near the school.”

I laughed at the horror the security detail must have faced as they prepared to keep the president as safe as possible. The President of Ireland was visiting a loyalist Protestant housing estate in East Belfast and the principal of the school sent personal invitations to loyalist paramilitary members to come as special guests. It seemed to be the epitome of invitational leadership and if not outright risky, it was certainly cheeky.

“I think he did that so he gave people a choice to say no,” Richard said. “I do think it shows a maturity of thinking in some of the thinking that if you don’t agree with somebody you don’t shout or roar you just say you won’t be there. I had some people from my church who was invited who said no; that they wouldn’t be there. We sort of said ‘alright, that’s up to you.’”

“At the end of last summer they opened that playground across there,” Richard continued as he pulled back the curtains of the office so we could see out into the yard. “It was the last day of school at the end of June and everyone went over there to open it and there were people who put out some tea and sandwiches and we had some of the politicians there to officially open it. Some of the people who would usually be opposed to Billy were there too. Billy invited them. The fact is they kind of sat on their own and only people who made an effort to go and talk to them gave them the impression that they were kind of isolated in the community. One or two of them were sitting on their own and I must confess I kind of felt sorry for them and went over to speak to them. Even though Billy disagreed with people in the community he would still invite them to things to try to get them on board.”
Tea With Queen Elizabeth

I had spent the previous day talking with Billy in his bedroom and enjoyed listening to him tell stories about his former teachers, principals and those who had been inspirational in his life. He spoke glowingly about his mentors and about the staff at East Belfast who do so much to make an impact on the students. Despite the numerous successes inside the school and accolades and awards, he continued to give credit to those around him. As a Canadian relatively unfamiliar with the British peerage system, I asked Billy to tell me more about the MBE and his response was not one of gratitude or humility but rather an affirmation of what the staff in the school was doing.

“I think at the time he was receiving the MBE we put on a lunch for him. There were balloons and everything. We got him a little present. That was it. Whenever it came to him being the centre of attention he didn’t talk a lot about it. I mean, one day he said something about meeting the Queen and that it was raining and they had to stand out in the rain. That’s the only thing I remember him saying about visiting the Queen. But he was very proud of it. He always wore the little equivalent of the badge, the little pin that says MBE. He did give full credit to the staff for getting it though.” Margaret said.

“Education was the sole aim of Billy’s life,” she continued. “He’d spend his holidays making power points. Every time you spoke to him he was investigating something.”

“He talked to me a year and a half ago about wanting to do some further work. He had his Masters but he would have liked to have done his doctorate,” Richard said.

“He wanted to do it in something other than education though. Something like: history or politics. He did start to work more on leadership but the illness started to take over. I did some stuff at our church on leadership and he was always good to talk to about different things. You could move from one discipline to another. He was always keen to do that.”
I shared my reflections on my conversation with Billy the previous day.

“When we talked yesterday we were three hours into the conversation and I told him that he hadn’t talked about himself the entire time. He talked about principals he had as a child and principals he worked with. He talked about everyone else and everything they were doing. Did he live that way as well?” I asked.

“He really did,” Margaret said. “He was unassuming. Certainly my experience would be that the principal was at the forefront. When there was an event at the school or it was sports day at the school the principal was supposed to be speaking but if it was Billy he would have avoided it. He would have preferred to have sat and talked with someone for an hour or two. He’d prefer not to be at the forefront. He once said to me he’s be going up because someone would be holding a tea for him and he’d say “I hate this” and he wasn’t being ungrateful he would just prefer not to be in the forefront. He’d rather be with the kids than be celebrated for it.”

**Dissolving Borders**

I spent the next few days in the school in classrooms, outside on the yard, and even joined a class for a hike through the local park. I sat with students in the grade 6 class as they wrote back and forth with their partners in the Republic on line in the dissolving borders project. I asked the students about the project, why they were doing it, and what they thought of the idea of connecting with kids across the border in the south.

“My parents didn’t like it,” one boy said. “They didn’t want me connecting with any Catholic kids.”

“Why is that?” I asked.

“I don’t know,” he responded. “I’m not supposed to like Catholics.”
“What do you think of your friend though?” I said, indicating the boy he was communicating with in the south.

“He’s a gas!” he responded with a smile, indicating his affection and appreciation of his sense of humour. “And he’s a United fan. What’s not to like?”

“Is it ok that he’s Catholic?” I said.

“I don’t even think about it,” he replied. “He’s just a mate now. Though it’s mostly through the computer we’ve met a few times. We’ve taken trips as a class and they’ve come up here.”

Though the program was called dissolving borders I felt the dissolving hatred as the boy moved beyond blind hatred to acceptance to friendship through a program introduced through the school. They didn’t simply talk about accepting others. That would not have been enough within the context of a staunchly loyalist housing estate. The school had to offer more by inviting students to participate and parents to trust them to do so. By the time the program was introduced Billy had established the trust of most of the community who were willing to go beyond their comfort zone and allow their children to do the same in the name of peace and a better future.

I listened to similar stories of connections students were making with their friends across the border. Sharing their love of football teams, television programs, and Justin Beiber seemed so natural and obvious for eleven year olds but these eleven year olds were never supposed to have been in contact with one another. They were supposed to hate one another from a distance but the staff of East Belfast Primary under the leadership of Billy Tate invited them to let go of their preconceptions by inviting them into their schools through the computers and then through their visits.
The conversation was light and casual as students shared with me theirs and their friends across the borders’ interests as if they were sitting next to them. I’m not sure if long lasting relationships will result from a project like this. Perhaps so. Perhaps not. They might never look at Catholics as a group the same again. Certainly not in the way their parents might still struggle with. It is easy to hate people you don’t know but much more difficult to hate the person with whom you’ve mutually professed a love of pop stars.

**Hallways and Classrooms**

Margaret led me around and showed me the school while at other times I simply slipped into classrooms and joined classes mid-lesson as I would in my own school. Every room was equipped with Smart Boards affixed to the wall and many of the lessons I joined revealed students comfortable with the technology and teachers utilizing it effectively.

“Billy is always moving forward in many ways,” Margaret said. “Technology is definitely one of them. We have spent a lot of time and money getting the equipment, training staff. It’s a lot of money and this isn’t a community or school rolling in the money but Billy thought it was an important investment. Both the staff and students really seem to like it though.”

I sat with students as they practiced spelling, wrote paragraphs, and completed math problems. I was interested in their curriculum and the way in which students and staff appeared to happily approach their work and problems while they took every opportunity to speak with me about my school and Canada. I spent much of my time there talking about the amount of snow we seem to get every winter and the fact that my school is located about an hour and a half’s drive from Stratford Ontario; the home of
Justin Bieber. If I hadn’t known about the pop singer before my trip to Northern Ireland I was introduced to his international fame by the students in east Belfast.

A Walk in the Woods

I accompanied a grade 5 class and their teacher on a discovery walk through the urban park located close to the school. Mary and I walked and talked about her experience at East Belfast Primary and the contribution of Billy’s leadership to the creation of an inviting school.

“Billy tried things here that no one should have tried,” she said, “and the school, community and kids are so much better for it. Irish dancing should never have worked here. As beautiful as it is to watch, this community would consider it to be connected to the republic and anything associated with the republic is supposed to be hated. He challenged that.”

“And the hurling?” I said.

“The hurling even more so. Anything GAA is off limits here. Those are Fenian games as they’d say around here. Catholic games. The GAA has long represented and supported the idea of a united Ireland rather than what we have now. They weren’t allowed to play GAA under English rule so the existence of the games at all has always been seen as a thumbing of the noses to the English and a form of resistance. Around here, not only are GAA games not played they’re not even mentioned. When Billy tried to get a hurling club going here at the school there were many who weren’t too happy. He did it anyway. That’s Billy. He invited these games into the school and invited the community to trust him. The thing is the kids love it. They have a gas with the hurling sticks. It’s a part of our heritage but there are many people up here who don’t see it that way. These kids will see it as a game hopefully rather than a political statement.”
“Was this typical of Billy?” I asked.

“It was but not recklessly so. He doesn’t present these off the wall ideas without a lot of forethought and consideration. He calls it *intentionality* which means when he does things he does so on purpose. When we tried this we did so knowing we would not be popular with some within the community but we committed to it as an educational ideal as he called it. He was willing to put himself out there so we were willing to stand behind him.”

“How’s it gone?” I asked.

“The kids love it. I don’t think they think about much else besides the game when they’re playing. As I said, some parents weren’t too keen but as time went on that died down too.”

We walked and talked as the students explored the area. She told me about her professional ambition to be a school leader one day and how she admired Billy’s leadership and commitment to an inviting perspective. Having just interviewed Billy in his bed days earlier I cautiously brought up the obvious.

“What about here?” I asked. “Is there any chance of moving into a leadership position here?”

She laughed and shook her head.

“No. Not here unfortunately,” she said.

“Why not?” I asked. “Succession planning is vital to leadership. I’ve witnessed a welcoming, inviting staff who seem to be focused in the right direction. Moving forward with a leader with a congruent vision might be an important thing for the community.”

“They’d never have me,” she said. “I’m Catholic. Nobody knows at the moment, though I’ve been here for over five years. Nobody’s asked, thank God. If I applied for
the headship they’d know though. My primary school’s on my CV. People would ask and it would come out eventually.”

“You’re a well loved and respected teacher who has been here for five years,” I offered.

“It will come out eventually and it will be a good thing,” she said. “Most won’t care. They’ll know me as and respect me as the teacher they knew. That’s fine. That’s a good step. They might tolerate but not accept. Not yet. I like it here and I’d like to stay. I’ll become a principal some day and when I do I hope to do so keeping in mind what I’ve learned here from Mr. Tate.”

I remembered Billy’s story from a few days earlier about the hiring of a Catholic teacher without the board’s approval and realized I was speaking with her.

**Belfast City**

As I drove home each night I took careful note of the neighbourhoods and how they changed dramatically from block to block. I was relatively familiar with the city in broad terms but the intricacies of street by street and block by block affiliations were proclaimed loudly at every corner. Curbs painted blue, white, and red, and Union Jack, or red hand of Ulster flags hanging from lamp posts or in front of houses indicated a loyalist section of the city as obviously as the murals of men holding machine guns proclaiming freedom for God and Ulster on the side of row houses. A few blocks further and green, white and gold flags and murals celebrating the hunger strikers revealed the Republican part of town. Men and women killed by each other, the police or through starvation as political protest were revered as heroes throughout the city on both sides of the divide.

Each mural, flag, or graffiti proclamation of the right to freedom and independence kept alive the memory of those who lost their lives and the situations in
which they died. Instead of moving beyond incidents that happened over forty years ago as the Troubles erupted in the late 1960s, early 1970s or as recently as thirteen years ago with the Omagh bombing, the city remains pock-marked with constant reminders of the division between the two communities: Catholic versus Protestant, Loyalist versus Republican, terrorist versus freedom fighter. It is within this context that East Belfast Primary and every other school exists: a city longing to move beyond the Troubles, the divisions and the lingering hatred but unable to turn a corner without being reminded of the necessity to take sides.

As I drove through the city each day, it was easy to be taken in by the beauty of the northern town in the process of shaking off the industrial dust of the past and embracing the potential for a cosmopolitan future. I was constantly reminded of its violent past driving by brick walls with broken glass cemented into the top and police stations with twenty foot high barbed wire fencing around it and security guards whose sole responsibility it is to protect the police. Victorian brick buildings salute the past while new structures built with glass, a building material that would never have been used before the Good Friday Agreement because of the carnage a bomb would cause, begin to rise throughout the city. East Belfast Primary seemed like more of an oasis as I was welcomed with open arms by a staff eager to invite me in and students benefitting from their perspective.

Widen

I had been in contact with Billy for over three years by the time I journeyed over to Belfast to meet him and experience the school and had developed a strong impression of his leadership and approach to invitational theory. He was certainly celebrated publicly throughout the community, city, and in both the Republic of Ireland and
Northern Ireland and perhaps most distinguishably through being named a Member of the British Empire by the Queen. His relationships with politicians in the south, including the President and Taoiseach of the Republic Ireland as well as his two audiences with the Queen indicated a man of high public esteem. Relationships with heads of state are usually reserved for other heads of state, politicians, or celebrities and not for elementary school principals.

Despite the praise and honours, I was nervous that the public accolades and sound advice he gave me throughout or conversations might not live up to the reality of his school as revealed through his staff, students, and community when I arrived. The profession of commitment to an idea can be one thing but as was highlighted earlier in the paper through my reflections on my own leadership, an inviting leadership is revealed through the five Ps: places, people, programs, policies, and processes.

**Places**

Billy recognized the importance of the place to the creation of an inviting school. He refused to remain idyll when paramilitary groups hung flags proclaiming “For God and Ulster” with the red hand of Ulster around the school and the community. The flags were indications of loyalist Protestant politics and clearly delineated territories around the city by indicating which areas were safe to be in and which were not. To Billy, these flags represented the ultimate intentionally disinviting stance. Though the men that put the flags up were tough, violent men, he used all available contacts and resources available to him to prevent them from flying not only around East Belfast Primary school but around the community in general. Professing a commitment to creating an inviting school is one thing but the recognition of the signs and indications of disinviting and in the case of the Ulster flags a warning to others to stay out was simply incongruent with
his philosophy for the school.

The school was further made into an inviting one by moving from a place where parents were required to remain outside of the gates when he first arrived to a community hub in which parents could come into the school for programs, to connect with one another and to feel part of the community. His use of the school for community building evenings such as quiz nights or coffee mornings opened the school up to the outside and encouraged cooperation and transparency. Classrooms became places of welcome for parents to engage in the learning of students in partnership with the teachers by prioritizing a welcoming environment.

People

My conversations with Billy, his staff, and my visit to the school revealed his appreciation for the importance of people and relationships to a healthy school and community. He possessed the gift of being able to develop positive relationships with all people regardless of their political or religious persuasion and modeled this for his staff and community. He took the perspective that it is easy to hate those you don’t know personally and lived it by hiring a Catholic teacher and embracing her in the school with the intention of having the community come to know and love her for the person she is rather than the primary school she attended and the politics of her community. By “forgetting” to file the paperwork of this appointment he put himself on a limb by staking his reputation on the hiring of a teacher the board would not have agreed to because of her religion and the school she attended as a child.

The way in which Billy worked toward the elimination of hierarchy within the school by respecting the contribution of all to the education of the children is an example which has made a direct impact on my leadership at St. Stephen’s. The opinions of all
were respected and taken into account and the successes were shared equally amongst the staff. When the school was being recognized with an award to be received in Strasbourg, he made a point to bring representatives from the entire staff, not just the academic staff to receive the award and the accolades that went along with it. He could have easily travelled to Strasbourg alone as the head of the school and received it on behalf of the school but instead he insisted on equal representation of all contributors to the school for such a special occasion. When staff were invited to the President of Ireland’s home in Dublin, Billy piled teachers, educational assistants, secretaries, and himself onto a bus and brought them down to the reception. An inviting school recognizes and celebrates the contributions of all to the creation of an inviting learning environment so walking the walk in moments of difficulty and times of triumph are equally important.

**Programs**

The dissolving borders project invited the students of East Belfast Primary to put aside preconceptions and enter into relationship with students they would not normally be in contact with by using a form of controlled social media to connect on-line. The program also invited Catholic students into the school virtually and physically with mutual visits. Participating in cross border relations programs with schools in the south invited the reconsideration of accepted norms and historical division by encouraging students to connect personally rather than politically. Further participation in community and family swaps whereby Catholic families would host and put up students from East Belfast while families from the community would reciprocate invited deeper understanding and movement beyond tolerance and into relationship with one another.

Billy introduced athletic programs to East Belfast such as hurling; a sport traditionally associated with the republican community in the north and Irish dancing at
the school. Students participated in and learned about these Irish traditions as sport and culture and a way to invite cross-community dialogue and understanding. Billy understood that invitational leadership and an inviting school could not be fully realized within an intentionally segregated and isolated community. Though fiercely and publicly opposed by many within the community, Billy persevered in the face of intimidation and threats, courageously optimistic that better futures were possible through inviting programs.

Policies

The implementation of the morning coffee routine changed the policy of the school from one which parents were expected to wait outside to one which welcomed them into the school for community and fellowship and to establish and foster relationships. The simple act of inviting parents into the school through coffee changed the perception of the relationship between the parent and academic communities and began to forge partnerships. Inviting parents into classes which were previously out of bounds develops mutual respect between the parent and the teacher whose partnership is so important to the child’s development. Lastly, as referenced earlier, Billy’s policy that all members of the staff join in any recognition or award invited equality and mutual respect amongst staff members.

His policy of inviting everyone to be part of the decisions in the school recognized the gifts and talents of each individual and the potential contribution each can make to the community. Whether planning for meetings, the President’s visit, or being invited to sit on a committee with the Prime Minister of Ireland he made it policy to have the voices of all heard by offering seats at the table to all stakeholders.

Processes

The hiring of Mary, a Catholic teacher, to teach at East Belfast Primary reveals
Billy’s use of processes to the advantage of providing the opportunity for someone to become part of the community who would not normally have if the processes were followed to the letter of the law rather than the spirit of the law. Billy knew that Mary would not have been accepted by the board had he followed processes but understanding how things worked and then doing what he thought was the right thing to do in congruence with his vision of the creation of an inviting school.

When the paramilitary groups began protesting the visit of Mary McAleese, the President of Ireland, by threatening to protest and putting up Ulster flags around the community instead of confronting entering into conflict Billy simply invited them into the school to have them share in the process and encourage them to become part of the visit rather than in opposition to it. The flags were removed and they attended peacefully knowing their concerns were heard as Billy’s process for hearing their voices resulted in inviting them in rather than shutting them out.

**Leading Personally and Professionally**

Billy did not separate his personal life from his professional. He understood what was required of him and committed himself to doing the best he could by taking courses, inviting others to take advantage of professional development opportunities and modeling life-long learning and curiosity. When offered a pay raise he took the money and quietly re-invested it into the professional development of some of his younger staff unbeknownst to them. As he got to a point where money no longer mattered, he lived a life of service to his staff and sacrificed his own money so that others could have the opportunity to learn and grow as educators which would make an impact on the students and community at the school.

His dinner parties, at which prominent members of vehemently oppositional
organizations would be invited to sit down together for dinner at his house, opened the doors of his home and revealed an individual committed to inviting peace in the community by working for it inside of the school and in his own home. Former republican terrorists and members of the police force along with Protestant ministers and Catholic leaders. He committed to the idea that hate could not persist amongst people when forced to confront one another in civilized ways and lived the idea in practice in his own home.

Invitational leaders recognize that there is no separation between personal and professional lives and ideals as one influences the other. As an inviting leader Billy was prepared to open his home and family up to idea that peace can be achieved in Northern Ireland one dinner at a time.

**Mentorship**

Billy listened more than he talked. He helped me to come to my own conclusions without directly influencing decisions by respecting my voice and inviting my participation in the mentorship process. He even mentored me on the mentorship process when he told me that I’ll know I’m becoming a better mentor when I am doing less and less talking and those I am mentoring are coming to their own conclusions. As I sought his expertise he never pretended to be an expert. Instead he asked for my opinion and reflected on my answers from week to week as our relationship developed.

Perhaps most importantly, Billy’s mentorship revealed what was possible within a school, how education can transform society, and the impact of leadership on making it all possible. He considered my situations from across the Atlantic sincerely and thoughtfully regardless of the gravity of the situation. I might be seeking his input on school improvement planning when he was dealing with threats from paramilitaries but
he gave each situation and subsequently my leadership his full attention. I began to recognize that big things make big impressions, but it can be the culmination of smaller situations that have the greater impact on a community. While he never presented himself as an expert, always thirsting for more experiences and education, he was willing to share what he knew and offer guiding, supportive counsel throughout our mentorship relationship. His work at East Belfast forced me to question what was possible. If a leader can lead change and foster cohesion in sectarian Belfast, nothing should be impossible at St. Stephen’s or anywhere else.

**Returning to Canada and St. Stephen’s Elementary**

I arrived back in Canada from Belfast as a changed man and school leader. An inviting approach to educational leadership had provided me with something solid to hold on to as I struggled with the realities of the big picture and the everyday. I understood how leading from an inviting perspective had influenced my approach to leadership and informed my practice very directly as a school principal. I was working toward the development of practical wisdom and an inviting approach was integral to that process. My time in Belfast illuminated the immense impact of an inviting perspective. Having witnessed an inviting school in what should have been one of the more uninviting places on earth was both humbling and inspiring. Disagreements at St. Stephen’s would not result in my having to check under the wheel wells of my car each evening. A conflict situation at St. Stephen’s would not likely lead to an altercation, let alone violence that could include an AK47. Disagreements were not taken lightly at East Belfast Primary and threats were made by people who were used to carrying them out. The fact that Billy could create an inviting school in such a place made me feel like anything was possible at St. Stephen’s.
I spent the next few days listening to our conversation over and over again on the mini-disc they were recorded on to hear the stories again and process how Billy had lived his life as an educator, teacher, and leader. He could have had a very successful and stable career if he had toed the political line as a Northern Irish Protestant and rose up the ranks of the educational system. Instead he developed his own moral purpose which informed his decisions and practices. While others told him he was being naïve or even cavalier in his rejection of societal norms, he understood the immense importance of the role of leader to be more than caretaker of the building and overseer of curriculum. Billy understood intimately the fact that he was called to model tolerance and acceptance which he hoped would eventually lead to inclusion and peace one day. Being a leader in Southern Ontario requires a well-developed sense of moral purpose and the fortitude to do the right thing in the face of public pressure but doing so in East Belfast Northern Ireland requires courage well beyond the norm. It is one thing to be ready to stand up for what you believe in and quite another to be truly willing to die for your ideas and convictions.

Knowing that the principal he succeeded in Armagh was killed as was the principal at the next school down the road did not deter him. Despite the fact that parents were murdered on the steps of the local cathedral because they were integrated as Catholics into a Protestant school did not change his policy of inclusion and cross-community relations. Checking under his car each evening before leaving the school and each morning before heading out of his driveway became as routine as grabbing a morning coffee and as such did nothing to diminish his conviction to lead in a way that modeled an inviting perspective and to love and embrace all as human beings capable of more than their actions revealed as members of the IRA or Loyalist paramilitary groups.
Billy lived within the idea of the immense possibilities of inviting leadership and invited others to do the same. The results are a community in transition from barbed wire fences, loyalist paramilitary flags and barricaded police stations to a community in which differences are moving from tolerance to acceptance toward inclusion. It was a lot to take in and even more to process. As I considered my leadership at St. Stephen’s, challenges appeared minimal and the importance of leading from an invitational perspective seemed even more possible and infinitely more important. I wrote faithfully daily upon my return to St. Stephen’s, reflecting on how Billy had influenced my decision making whether large or small and my leadership.

**An Honour Guard of Hurling Sticks**

I arrived at school as usual on the morning of Wednesday June 16th and went about my morning routine writing the news of the day on the whiteboard in the office, checking the absences and substitutes assigned for the day, and putting on a pot of coffee in for the secretaries and myself. As the percolation began I wandered into my office, plugged in my computer and turned it on knowing it would take longer than it should to fire up. I went out to the main office to connect with the secretaries about the day ahead and headed outside to greet the buses as they arrived and open car doors for parents and students at the kiss and ride as usual. As the bell rang and the students lined up to enter the school I greeted the last few cars before joining the students in the hallway as they prepared for the start of the day. After morning exercises were completed and the last of any late arrivals were in class I sat down at my computer and opened up my email. There in my inbox was an email from Billy’s son. My heart sank. I opened the note which shared the news was expecting since Billy first shared the news of his illness.

“It was my Dad’s wish for me to contact you in relation to his death when it
occurs,” the note started. “It is with great regret that I tell you that Dad passed away this morning peacefully at home. He was pain free, the sun was shining outside the window and it is exactly how he would have wanted to go.”

I sat back in my chair and stared at the screen. Though the arrival of this note and news was inevitable as highlighted by my visit to Belfast months earlier, it still took me a few moments to take it in. After a deep breath and quick prayer I got up from my desk, ignored the rest of the unopened emails in my inbox and walked down the hallway to join the grade 3s for a guided reading lesson.

When I first connected with Billy over 3 years earlier he was vibrant and energetic about his life and work as a school leader. He shared stories with a passion that revealed his commitment to leading his teachers, students, and the community in the knowledge that learning is a lifelong pursuit, that everyone is a part of it, and there is so much more to know. People are worth the investment and the best chances for the maturation of that investment is with our children. He modeled the fact that peace is possible in a community which had never truly known it. Children would not have a chance to learn if bombs were going off in the shopping districts and their heads were filled with traditionally accepted biases and hatred.

“A school should be a safe place for children,” he would say. “An inviting culture that welcomes the contributions of all is an environment that encourages curiosity and discovery.”

By the time I made my way to Belfast a few months earlier, he was confined to his bed but his spirit was unencumbered by the frailty of his body. He spoke of Northern Irish tragedies he had witnessed as opportunities to change hearts, programs he had implemented as obligations to the community, challenges and opposition he had
encountered as part of the peace building process, and students he had worked with as hopefully having a future without sectarian bias or violence. While he struggled to move much beyond shifting his weight in bed and dutifully sipped water from a straw to combat the dehydrating affects of pain medication, he shared stories and experiences with humility and pride. He lit up most brightly when speaking about his staff doing great things or mentors he had and begun to yearn to do more. He recognized the shoulders on which he stood as an educational leader and spoke of mentors and colleagues he worked with throughout the years with reverence and optimism, crediting their decisions, bravery, and commitment to any of his own accomplishments. Billy marveled at the ways in which parents embraced controversial initiatives such as the introduction of hurling to the mainly Protestant housing estate. His own accomplishments and awards he diminished and downplayed in favour of lauding the contributions of others. I sat in the chair and listened to the man who had become an educational mentor and absorbed as much as I could about how to lead from an inviting perspective, how to create an inviting environment, and how to have the courage to do so in the face of threats of violence and retribution.

Billy Tate’s death was mourned on both sides of the Irish border and tributes ran in local papers such as the Portadown Times and national newspapers such as the Belfast Telegraph and Irish Times. Stories told about his career in education, his leadership in cross-border relations in Armagh and East Belfast Primary, and the numerous awards he and his staff had received as well as the MBE he was given personally. Dignitaries and public officials such as the President of Ireland Mary McAlesse attended his funeral. One of the more remarkable tributes for Billy Tate was also the most surprising because it took place at Croke Park, the home of GAA games in Dublin and the site of the first and
arguably lesser known Bloody Sunday massacre. Since then, the grounds have been considered sacredly Republican as they were used exclusively for GAA events, shunning foreign games such as rugby and soccer until recently. On the 17th of June, the day after Billy died peacefully in his home outside of Belfast, two minutes of silence was observed at Croke Park before the beginning of a historic cross-community hurling match between boys from the Catholic Falls Road and the Protestant Shankill Road sections of Belfast. The sanctified Republican grounds fell silent for two minutes to honour the life and contributions to education and peace made by a working class Protestant man from Portadown, Northern Ireland.

**Charting an Inviting Way Forward**

As I absorbed the news of Billy’s passing that day in June, I resolved to keep him in mind when making decisions, reflecting on practice, building relationships, developing policy, engaging in processes, and considering how to create and foster an inviting environment as an educational leader. Billy’s approach to leadership intentionally embraced an inviting perspective. He believed in leading in a way that honoured his moral obligation to work toward a hopeful, optimistic future for Northern Ireland through his educational leadership. Despite the numerous and dangerous obstacles presented throughout his career, he committed to living invitational theory and implementing it in practice in his schools. Inviting theory, as revealed through the leadership of Billy Tate, influences the educational culture and practice of staff, students, and parents in East Belfast Primary school in Belfast. Beyond the boundaries of East Belfast and the larger East Belfast community, Billy Tate’s inviting approach to educational leadership influenced political leaders, paramilitary parents, reformed and active members of the IRA and loyalist paramilitary groups, and the public’s long-held perceptions by openly
challenging historical, cultural, and social divisions. He used his leadership to influence public policies and modeled an inviting approach that respected competing perspectives. He engaged people in processes and respected individuals free from their politics in order to move closer to common understanding and trust. The inviting leadership of Billy Tate not only contributed to cross-community relations, his inviting leadership moved the people and politicians of Northern Ireland and the Republic of Ireland toward peace after generations of hatred and violence. The influence of educational leadership cannot be underestimated. The contribution of invitational theory must be considered by current and aspiring educational leaders.

The next chapter considers the stories of St. Stephen’s and East Belfast, Billy’s leadership and mine, as providing opportunities for reflection and consideration on invitational leadership theory in Southern Ontario and Northern Ireland, and the wider applicability beyond. This is accomplished in the next chapter by wondering, wandering, and widening perspectives as a result of these stories in chapter four. Twelve discussion points are presented and explored, followed by five key implications for educational leadership, invitational leadership theory, mentorship, and educational leadership research for future consideration and discussion. Finally, the following chapter concludes with reflections on the past and considerations for the future of educational leadership and invitational leadership theory.
CHAPTER FIVE: DISCUSSION, CONCLUSIONS, AND IMPLICATIONS

Educational leadership is paramount to student success as the principal has an immense impact on the teachers, students, parents, and culture of the school which ultimately contributes to student learning. The demands of the role, however, are immense as pedagogical priorities compete with the politics of human relations, governmental and societal influence, maintenance and safety, discipline, and morality. While the numerous demands on a school principal might appear to make the consideration of theoretical influence on practice seem unrealistic, this dissertation set out to explore how the intentional consideration of theory can influence practice in contemporary schools. Specifically, this dissertation uses an autoethnographic methodology to discover how the intentional implementation of invitational leadership theory influenced my practice as an emerging school principal in Southern Ontario, as well at the leadership of Billy Tate, a veteran school principal in Belfast, Northern Ireland.

The literature review considered the establishment of leadership and leadership theories before exploring key contributors to administrative theory who have had the most direct influence on school leadership in Ontario, where I am a practicing principal. The key elements and principles of invitational leadership theory is then explored as well as invitational theory within the academy. Chapter 3 exposed the methodology used in this dissertation by considering autoethnography as a research methodology, the debates within the autoethnographic community, and the ways in which an autoethnographic approach can offer a unique insight into a phenomenon, in this case, into educational
leadership. This chapter also presents and discusses interviews and observational research as contributors to the methodology.

Chapter 4 provides the research as the story of my approach to living and leading invocationally and my reflections on the process, my leadership, and the impact on my community. Chapter 4 also provides a unique look inside the leadership of Billy Tate in Belfast, Northern Ireland as he intentionally embraced the foundational values of invitational leadership in his attempt to create an inviting school in his East Belfast community. The data, as revealed in the stories in chapter 4, was analyzed through reflection on the interview transcripts and field notes, member checking with participants, and peer debriefing with colleagues to discuss the findings and potential implications for educational leadership. This research provides an inside look at invitational leadership in practice in two very unique and distinct school communities. The research reveals not only the practical applicability and influence of invitational theory on contemporary school leaders, but also the potential universal applicability. Since it is not a prescription for action but rather a philosophical foundation for a way to be, the key principles, ideas, and values are revealed as universally applicable and influential as will be discussed in this chapter.

Wonder, Wander, and Widen

As I began this research project concurrently with my educational leadership career, a three-part educational journey evolved as I considered the big ideas of educational leadership, connected with a mentor principal in another country, travelled to connect with him, and returned home to consider it all. I wondered, wandered, and widened.
I wondered how I was going to juggle the enormous responsibilities and challenges of the role and considered ways in which I could support myself and contribute to the community. I actively sought something solid which I could hold on to as I entered the profession and contemplated how an inviting approach to leadership could influence me personally and professionally. I wondered how an inviting approach to leadership could support my practice and if it would have a positive influence on the students, school, and community. I wondered how universally applicable an inviting perspective could be. Could it work outside of St. Stephen’s Elementary in a different context entirely? Are the foundational values transferrable socially, culturally, and politically and ultimately universally? Do ideas matter to contemporary school leaders? What is the relationship between theory and practice and how does each influence the other?

I wandered to Belfast Northern Ireland after three years of mentorship with Billy Tate at East Belfast Primary. We connected over a shared philosophical approach to leadership and love of Irish rugby. Belfast, Northern Ireland is known for its sectarian enclaves, historical hatreds, and mistrust between Catholic and Protestant communities, yet Billy Tate claimed to practice invitationally, work across communities and borders, and challenge preconceived stereotypes and hatred. I travelled to Belfast to find out if it was true or even possible. I found an inviting school in a housing estate that had no business being inviting being run by an affable, intelligent, charismatic man who exuded care, optimism, respect, and trust and expected it from all staff, students, and parents within the community. As a result he accomplished what no one thought was possible through cross-community events, celebrations of shared language, athletic games, and language and the welcome of political dignitaries from both sides of the border in the
spirit of bridge building and peace. My wandering to East Belfast allowed me to witness first hand and speak with those within a school community who had done so much to create an inviting school that they had been recognized not only with international peace medals, but Billy being made a Member of the British Empire by Queen Elizabeth II. As I wandered the streets of Belfast each day and observed the outward signs and symbols of the on-going divide I recognized the enormous impact one man made by committing to invitational leadership and inspiring and encouraging others to do the same.

My perspectives widened upon my return home to St. Stephen’s and upon reflection of my experiences in Belfast and at my own school. I recognized the influence an inviting approach to leadership had on my practice at St. Stephen’s. I recognize, however, that those challenges do not involve violent opposition or life and death scenarios. I was able to embrace an inviting approach to leadership within a suburban context in Southern Ontario. In a global context, St. Stephen’s was safe, secure, and stable and provided a seemingly optimal situation for intentionally living and leading invationally. Understanding how and why invitational leadership influences school culture is important within this context. I suspected the applicability was more universal and my journey to Belfast Northern Ireland widened my understanding of how an inviting approach to leadership lives and thrives in a very different and unique social, political, and historical context. My understanding of inviting theory broadened as I recognized the universality of the approach and the immense impact in a community that on the surface appeared to be the furthest thing from inviting. If invitational leadership theory can positively influence the leadership of a school principal in suburban Southern Ontario as well as a principal in Belfast Northern Ireland, perhaps it is a theory of educational
leadership worthy of further consideration in school boards around the province and throughout the world.

**Discussion**

The autoethnographic research in chapter 4 provides a unique perspective on educational leadership, revealing the influence of invitational theory in practice in two very unique contexts. While both stories are uniquely contextually situated, connected by a mentor/mentee relationship, they offer insights into specific leadership which can be interpreted as universal in their singularity (Denzin, 1989a). They reveal intentional invitational leadership through two school principals whose realities and social, political, and cultural contexts are so different, that their connection of invitational leadership can be generalized in its potential applicability. Invitational leadership supported the leadership and affected the schools in two vastly different contexts, therefore its potential for cross-cultural applicability in a wide variety of contexts is a reasonable conclusion made by this research. I tend to think in broad strokes and situate my ideas in a big picture perspective.

With that in mind, I am tempted to take the singularity of the study of both my leadership at St. Stephen’s and Billy Tate’s at East Belfast as providing reasonable evidence of the broad applicability of invitational theory and suggest a wider consideration of inviting theory on educational leadership and administrative theory. Quite simply, if it can have such a profound impact in southern Ontario and East Belfast, there is a strong likelihood that inviting leadership theory can be more widely generalized across school boards, provinces, countries, and contexts. It is from this perspective that this dissertation draws its conclusions and implications. As Norman Denzin (1989a) argues in his book *Interpretive Interactionism*, stories are not like any other and
applicable to all; narrative research can be universally singular whereby the exploration of the specific can be generalized to support the wider body of literature. This dissertation’s autoethnographic approach to my leadership and Billy Tate’s embraces this approach as both stories provide insight not just into the particulars of each leader, but into the universality of the leadership of each. I will, however, consider the conclusions derived from the data in this discussion.

A consideration of this data reveals important findings which support the further consideration of the potential influence of invitational leadership theory on practicing school leaders. These findings include:

1. The intentional consideration of practice and reflection on practice in an on-going way contributed to mine and Billy’s sense of efficacy and improved experiences.
2. Invitational leadership theory made a significant impact on the leadership of two school principals and as such, provides a grounded theory of practice to work from and make decisions.
3. The inviting leaders in this dissertation positively influenced the culture of their school communities.
4. St. Stephen’s and East Belfast schools are more than what happens within the classroom as an inviting culture positively influences both community involvement and student success.
5. Inviting leadership was successfully implemented in Southern Ontario and Belfast Northern Ireland, two vastly different socio-economic and political contexts, indicating the potential universality of the theory of practice.
6. Billy’s leadership at East Belfast and mine at St. Stephen’s reveal that a way to be is more important than a strategy for action.
7. Mentorship has been important to my leadership development, and challenged existing mentoring norms by reaching beyond the borders of community and country.

8. Autoethnography is a methodology that has the potential to connect to educational leaders and practitioners.

9. Autoethnography is increasingly embraced by universities around the world as a methodology that allows for rich exploration and consideration of phenomenon, connecting the self with the social as a universal singular.

10. Based on the data revealed through mine and Billy’s leadership in two very unique school communities, inviting leadership has the potential to be embraced by leaders around the world.

11. Two good principals doing good things significantly changed their communities.

12. Invitational leadership is not easy to live, regardless of the context. I will address each of these key discussion points individually below.

**Discussion Point 1**

The first key point is that the intentional consideration of practice and reflection on practice in an ongoing way contributed to my and Billy’s sense of efficacy and improved experiences.

My experience as a school leader up to the beginning of my tenure as a principal was rooted in the everyday as I reacted to situations and mentally separated big ideas and pedagogical theory from the realities of daily life in a school. My experience is supported by research (Zirkel, 2007) which makes the distinction between the professional development preferences of scholars versus professionals. It was not until I became a principal and understood that while the buck stopped with me in terms of my staff,
students, and community, simply reacting and leading unintentionally would not be enough to support my leadership and the school. I embraced an inviting theoretical perspective as I searched for something solid for me to stand on and base decisions moving forward. I wanted to be able to defend my decisions by doing things on purpose for purposes that I could defend. Invitational leadership theory offered me a way to be rather than a way to act, influencing my approach to specific situations as well as my big picture thinking and planning. As I considered the foundational principles and values of invitational theory and the ways in which they are revealed in tangible ways through the five Ps, I made the connection between the theoretical ideas and the ways in which they are lived out in both the big picture planning and the daily realities of school life. My approach to situations, relationships, policies, programs, processes, and the physical place changed my leadership from reactionary to intentional and thoughtful, providing me with a defensible approach to leadership, grounded in inviting theory.

Billy Tate similarly intentionally committed to living and leading from an inviting perspective. He credited his attendance at a professional development course run by invitational leadership theorist John Novak, as the catalyst for his embrace of invitational theory. He read more about invitational leadership and considered the intentional implementation of inviting theory on his practice and the creation of an inviting school in East Belfast. Billy’s thoughtful consideration and study of inviting theory translated into practice which resulted in tangible change in his school and community.

The story of my and Billy’s intentional embrace of inviting theory reveals how theory can positively influence practice. By exploring autoethnographically, inviting theory in practice is brightly illuminated for the reader, supporting the contention that theory, intentionally considered and reflected upon, can indeed make a significant impact
on the practice of contemporary school leaders. The autoethnographic methodology brings invitational theory to life for the reader through stories of the impact of living and leading from an intentionally inviting perspective.

**Discussion Point 2**

The second key point is that invitational leadership theory made a significant impact on the leadership of two school principals and as such, provides a grounded theory of practice to work from and make decisions.

Invitational theory suggests that all people are capable and responsible, have untapped potential, and can be called forth to contribute in creative ways to the school and leadership. An inviting leader leads from a caring core, is trusting, respectful, optimistic, and intentional about it all. When leading invitationally, a school should look and feel different as revealed by the 5 Ps and the 6 Cs approach to conflict resolution.

The research into Billy and my leadership reveal what the foundational values, principles, and ideas espoused by invitational leadership theory look like in contemporary schools. The research reveals this through the consideration of the setup of my office and the school itself, my approaches to relationship building with staff, students, and the community, the implementation of inviting policies such as the open door policy or the invitation extended to all students to come to the office with good work that encourage more active engagement in the school. Programs such as the Bethany Kids Lenten project invites students to engage in social justice and think about how they can think and act in a way that considers the big picture beyond their yard and community, while inviting processes such as the invitation to contribute to the creation of the new school crest at St. Stephen’s reveals the process as the product in the making.
Billy’s consideration of the influence of inviting leadership theory lead to his fierce protection of his school and grounds as an inviting place, standing up to paramilitary groups who attempted to exert influence. His development and cultivation of relationships held him in good stead when difficult situations arose such as the flags around the community or the potential protests when the President of Ireland visited. Programs such as Irish dancing and GAA games such as hurling were intentionally implemented to invite the outside into the community and invite the reconsideration of previously held biases. Processes were utilized to support opening up an inviting school as the hiring process of a Catholic teacher and policies such as the opening up of the school for community events or the establishment of a morning coffee policy reveal the impact that an inviting perspective can have on a school community.

Our leadership reveals the ways in which the intentional consideration of and commitment to living invitationally manifests itself in the school. The key ideas of invitational theory can be isolated individually and explored in a tangible way in order to not only reveal the applicability but also influence the consideration of how it can apply in a multitude of situations and contexts.

Discussion Point 3

The third key point is that the inviting leaders in this dissertation positively influenced the culture of their school communities.

The culture of an educational community is important as an inviting leader leads in a way that encourages others to live educationally. The St. Stephen’s community was transformed by an inviting perspective. My transition out of the school after 5 years allowed for reflection on my tenure and cards, notes, and emails from parents, staff, and students attested to the changes in the school and community. The school culture became
one of learning, collaboration, and community as parents, teachers, and student were invited to participate in the life of the school.

Billy Tate’s work in Belfast changed the culture of the school dramatically from a Protestant sectarian enclave to an educational community that invited Irish games, dancing, and the language into the school. Staff and students shared their enthusiasm for the new initiatives and the school was recognized with honours and awards such as the Prix de Tolerance for the school and Billy being made a Member of the British Empire. The school was recognized by the President of Ireland and the Taoiseach of Ireland as a school committed to doing things differently than other schools in the North of Ireland. Billy’s invitational leadership transformed the school and community by living and leading from an inviting perspective.

**Discussion Point 4**

The fourth discussion point is that St. Stephen’s and East Belfast Schools are more than what happens within the classroom as an inviting culture positively influences both community involvement and student success.

The involvement of parents and community members in meaningful ways in the educational goals of the school at St. Stephen’s and East Belfast highlight the importance of cultivating a culture of parental engagement and community involvement.

I embraced active community involvement in the school from an inviting perspective. This was done by inviting parents and community members to contribute to the school as community builders and partners in education. An inviting approach invites partnership by believing in the capability and responsibility of every member of the community for the school and that there is untapped potential to contribute. Through building relationships with parents and community partners, I understood the variety of
interests, abilities, and talents of the wider community. By inviting them into the school, I was not only taking advantage of our community partners to enrich the life of the school, but I also recognize how this provided opportunities for involvement that had not existed in the past. The result was a supportive community who answered the call and partnered with the school when it came to community building events and activities, as well as educational priorities. Parents were not merely involved in fundraising, but when they were, it was focused very specifically on the educational priorities of the school as outlined in our improvement plan. Parental volunteer groups ran French clubs, music and choir programs, extra-curricular math and science over lunch hours and after school. An inviting approach tapped into the potential within the community and invited parents and community members to give their immense talents and gifts to the school.

Our commitment to the Bethany Kids project in an on-going way similarly connected our students and community with the bigger picture and helped them to recognize how their work locally can make an impact globally. Inviting students to participate and enter into relationship with the doctors, nurses, administrators, and children at Bethany Kids provided, and continues to provide, an amazing connection to the wider world. I invited participation as I travelled to Kenya personally and led the community in this project by leading in a way that models our connection with the wider world as we recognized that learning is more than what happens in the classroom.

Billy Tate similarly and perhaps more profoundly, given the political and historical context of Northern Ireland, understood that learning is more than what happens inside the school. As communities in Northern Ireland and Belfast in particular, are segregated into sectarian communities, it would have been easy to perpetuate the norm. Instead, Billy actively invited the outside into the East Belfast community to connect
students with the wider world beyond their housing estate and politics. He invited games and dance from the republic into the school and began to embrace the Irish language within the community. Despite the negative reaction and unpopular response to these initiatives, Billy understood that students would begin to see beyond existing prejudices by connecting them to the world outside the school. The Dissolving Borders program connected students virtually and personally with one another as students were invited to engage with others they would not normally have.

Billy’s invitations extended to the political world as well as he welcomed the President of Ireland to his school, despite the protests of many within the community. His leadership modeled the connection with the wider world for his students, staff, and community. His acceptance of awards helped the community to recognize how others regarded their projects in Europe and around the world. Billy Tate’s personal recognition as a courageously inviting leader resulted in being made a Member of the British Empire by the Queen. Through our conversations, I recognized how much he valued that recognition not for himself but more for his community as validation of what they had agreed to engage in with him and that the world beyond the borders of the East Belfast housing estate noticed. Leading and learning beyond the school fence was exemplified by Billy Tate’s invitational leadership at East Belfast.

**Discussion Point 5**

The fifth key point is as follows: Inviting leadership was successfully implemented in Southern Ontario and Belfast, Northern Ireland, two vastly different socio-economic and political contexts, indicating the potential universality of the theory of practice.

This dissertation intentionally explores the leadership of two principals at very
different stages in their leadership careers, leading in communities which are dramatically different from one another. Both involve school leaders committed to living and leading invitationally and inviting others to do the same. Both lead communities interested and invested in the success of the students in the school. Both have staffs with different talents, levels of engagement, interest, and competency. Both have to manage the demands of the governmental policies and standards, while maintaining discipline, managing the building, human relations, union negotiations, and personal and professional conflict. There is a singularity to the role of principal that can be generalized across school districts and countries. There are, however, stark differences between communities within the same school district, let across the globe.

There can be a tendency to dismiss ideas, theories, and practices that may appear to be effective by diminishing the possibility for success in another context. That might work there, but it would never work here. The leadership of Billy Tate in East Belfast and mine in Southern Ontario challenges that dismissal.

St. Stephen’s is located in one of if not the most affluent communities in Canada. The parents are professionals and business leaders with advanced degrees and an average household income over five times the national average. Children do not want for much materially and the expectations on the children and by extension the school and teachers is enormous. Parental involvement is high as are expectations, as students seemingly have every advantage academically and in life.

East Belfast is located in one of the most historically politically, culturally, and socially divided cities in the world. The East Belfast housing estate is historically staunchly loyalist Protestant and very wary of the influence of republican, Catholic ideology. Hatred and mistrust has been passed down from one generation to the next,
complicated and intensified by The Troubles in Northern Ireland from the late 1960s, through the 80s and 90s, and still simmering today. Billy replaced a principal who had been shot by a paramilitary group. Teachers checked under the wheel wells of their cars daily for car bombs, and staff members and parents were regularly impacted by violence as a result of the deep division between the loyalist Protestant and republican Catholic communities.

Given the differences between the two communities, it might be considered reasonable to assume that leadership in St. Stephen’s would not work in East Belfast and that leadership in East Belfast would not apply to St. Stephen’s. This dissertation reveals otherwise. Invitational educational leadership makes a significant impact on the leadership in both contexts.

Invitational leadership suggests a way to be, rather than a way to act. A prescriptive approach to leadership that might suggest how to behave, prioritize, or follow steps might not translate as easily or effectively between cultures and contexts. Invitational leadership, as an evolving theory of practice, suggests a way to be by living and leading in an inviting way. This certainly looks different in different situations and contexts, but the foundational values and principles cross borders and boundaries.

While St. Stephen’s does not suffer under the burden of violence, historical division, or conflict, it represents the increasingly high expectations placed upon teachers, principals, and schools around the world. Decisions made at St. Stephen’s may not be as life or death as East Belfast, but are more typically right versus right situations, requiring careful and considerate leadership. St. Stephen’s is typical in its uniqueness. What works at St. Stephen’s can be applied elsewhere here in Ontario and at most school communities in the developed world. Despite the high income, higher demands, and even higher
socio-economic realities, St. Stephen’s is still a publicly funded school with a staff of teachers, assistants, support staff who work with parents and community partners to support the learning of all students. St. Stephen’s operates within a public school board, answerable to the Director of Education and governed by a board of Trustees, who report to the Minister of Education and the government. In this way, St. Stephen’s represents publicly funded schools around the developed world as we recognize that each community is unique, similarities remain.

East Belfast primary is situated in a loyalist Protestant housing estate in East Belfast, Northern Ireland in the aftermath of The Troubles which plagued the country for years. Many parents were active or former members of paramilitary organizations and most had been impacted directly by The Troubles and were used to living segregated lives. Threats and disagreements could easily lead to violence as precedents existed. While courageous leadership was required to challenge this status quo, decisions could be considered less nuanced and more black and white. Keeping the influence of violent groups away from a school may seem obvious, though difficult to enforce. The programs, policies, and initiatives started by Billy could have resulted not only in opposition from the community, but in violence against him personally. Billy’s commitment to living and leading invitationally, however, led to the slow dissolution of existing barriers and a move toward peace by inviting the outside into East Belfast.

The research in this dissertation explores the ways in which invitational leadership supported my leadership at St. Stephen’s and Billy Tate’s in East Belfast. This research reveals what inviting leadership looks like in practice. Perhaps more importantly, it does so in two very different school communities. By doing so, this research supports not only the applicability of invitational leadership theory in practice, but also the universality.
invitational leadership theory can make a significant impact on my leadership as a new school principal in Southern Ontario as well as on the leadership of Billy Tate in East Belfast, it can make an impact on more school leaders who are willing to commit to living and leading from an invitational perspective. This research reveals that cultural and context, while important considerations, do not limit the applicability and influence of inviting theory. Instead, it is revealed as a theory of leadership with universal implications worthy of wider consideration.

**Discussion Point 6**

The sixth key point is that Billy’s leadership at East Belfast and mine at St. Stephen’s reveal that a way to be is more important than a strategy for action.

The differences between the St. Stephen’s and East Belfast communities as noted above further supports invitational leadership theory’s assertion that it is more important to lead from a personal perspective than it is to follow educational leadership rules or guidelines. Invitational leadership theory suggests a way to be, rather than a way to act.

This dissertation’s research reveals how my leadership improved as I began to understand myself as a leader and constantly reflected and refined. I rejected the notion of playing a role, like an actor in a play, and leading in a way that I thought everyone expected me to. Instead, the more comfortable I became with myself as a leader, the more effective I perceived myself to be. Moreover, the more confident I became with embracing an inviting perspective, the more I felt I could accomplish as an educational leader.

This distinction between a way to be and a way to act can be linked to perceptual psychology, a theory for understanding people. This theory made a major contribution to American Psychology by focusing attention on the relationship between someone’s
experiences such as their perceptions, goals, beliefs and the meanings they derive from them and the way they are manifest in actions and expressions (Combs, Richards, & Richards, 1976). Perceptual Psychology suggests that our behaviour is determined by the values, attitudes, and beliefs that shape ourselves and our worldview (Combs et al., 1976). As I committed to living and leading invitationally, I reflected on my practice, my beliefs, and attitude which influence my actions as a leader. Quite simply, the more I reflected on leading invitationally, the better I became at living invitationally. My confidence in myself and my leadership increased tremendously as I freed myself from attempting to act in a certain way and instead embraced simply being, reflecting and refining along the way.

Billy perhaps exemplified this to a greater degree because while I was developing from an unsure leader into a more confident one as my perceptions supported my increased confidence, Billy seemed to exhibit a well-developed sense of self as a leader which contributed not only to his decision making, but his courage to do so in the face of violent opposition. His experiences, goals, and beliefs contributed to his actions as a leader who invited others to live educational lives and contribute to the creation of an inviting school.

There is no playbook, guidelines, or suggested ways to act that can universally apply to all leaders all of the time. This research reveals, however, that embracing a way to be, rather than a way to act, contributes to greater confidence, reflection, and refinement on practice and is indeed applicable across communities, cultures, and borders.

**Discussion Point 7**

The seventh key point is that mentorship has been important to my leadership development, and challenged existing mentoring norms by reaching beyond the borders of community and country.
There is a plethora of research supports the importance of mentorship to the development of educational leaders (Bloom, 1999; Daresh, 2001; Fullan, 1995; Hallinger, 2005; Hansford et al., 2002; Hansford & Enrich, 2006; Ontario Principals’ Council, 2011; Rich & Jackson, 2005; Robinson, 2010; Zachary, 2006). The immense responsibilities of school leadership present challenges to new and emerging leaders and support for these new leaders by existing leaders is important. However, existing programs in school boards across Ontario are board-specific in that they are organized, managed, and planned internally and mentorship opportunities and partnerships are created within the school board. This can lead to political challenges and obstacles to effective mentorship as mentees may not be as willing to share insecurities or challenges for fear of limiting themselves professionally (Long, 1997). Mentorship done poorly can be worse than no mentorship at all (Hansford, Ehrich, & Tennent, 2004).

This research reveals the importance of seeking mentorship opportunities outside of school boards. As I connected with Billy across the Atlantic electronically, I freed myself from any potential political conflicts or career-limiting admissions because his advice was free from political influence. He had no impact on my career, could not influence my chances for future promotion, or offer me strategies to help me to successfully navigate the system. His lack of contacts within my board and lack of familiarity with our school system meant that his advice could be more easily focused on doing the right thing for the right reasons, rather than giving advice that would be tinged with practical political advice.

This research does not diminish the importance of existing programs, but further suggests the importance of mentorship to support school leaders that is free from political influence by encouraging mentorship from outside school districts.
Discussion Point 8

The eighth key point is that autoethnography is a methodology that has the potential to connect to educational leaders and practitioners.

Educational scholars conduct research which they hope will influence the practice of teachers and leaders in schools. The way in which the research is presented can contribute to this goal by doing so in an accessible way. Zirkel (2007) notes the discrepancies in the preferences for the consumption of professional periodicals between academics and professionals. Autoethnography, in the case of this dissertation, provides an intimate exploration of educational leadership as a narrative intended to more easily connect with educational leaders and scholars alike. Stories have the ability to illuminate, connect, and reveal unique situations and phenomenon in ways that quantitative research cannot (Pink, 2006). Autoethnographies can elicit an emotional response to the research (Ellis, 2004; Jones, 2005; Richardson & St. Pierre, 2005), or be reflectively analyzed and connected critically (Anderson, 2006). Narratives, such as an autoethnography, can reveal the essence of a phenomenon in an intimate and engaging way.

I have used stories from this dissertation in articles for publication and presentation at conferences around the world. With each presentation, I am encouraged by the feedback and encouragement by those in attendance. I presented a paper on Billy’s approach to the 5 Ps of invitational leadership at a conference in Dublin, Ireland in April 2012. I received an email in September 2012 from an attendee at the conference who requested a copy of the paper because she was so moved by the story of Billy’s leadership. She also inquired about invitational leadership as a result and has since gone on to present within her school board in Ottawa on invitational leadership as well as within her principal’s preparation course. The autoethnographic approach to that paper
connected with her as a practitioner and as a result, inviting theory is being presented and
discussed in the Ottawa school board as a result. An autoethnographic approach to
research has the potential to connect with practitioners in an accessible way that
encourages consideration and reflection. Stories invite others into experiences to allow
for collective reflection and consideration of events, activities, strategies, decisions, and
how they influence practice and school communities.

**Discussion Point 9**

The ninth key point is as follows: Autoethnography is increasingly embraced by
universities around the world as a methodology that allows for rich exploration and
consideration of phenomenon, connecting the self with the social as a universal singular.

A review of the literature reveals a remarkable embrace of autoethnography as a
research methodology within the academy as revealed through the steady increase in
successfully defended autoethnographic dissertations at universities around the world. As
more autoethnographies are defended, more students are recognizing the value of this
form of research and embracing it as a way to explore problems and ideas creatively
within the academy.

**Discussion Point 10**

The tenth key point is that based on the data revealed through my and Billy’s
leadership in two very unique school communities, inviting leadership has the potential to
be embraced by leaders around the world.

At the time of writing this conclusion, I have co-written an article that was
published in the Catholic Principals’ Association of Ontario magazine on invitational
leadership, I am working on another article on how an inviting culture can contribute to
student success for the winter 2013 edition, and invitations to speak at school boards have
been extended and accepted. I lead a three-part leadership course at my school board for existing principals and emerging leaders which explores inviting education. Feedback from the articles and courses continues to be strong as educational leaders consider a different way to lead and be.

The story of Billy’s leadership in East Belfast further supports the universality of this approach to school leadership. This has been further embraced by the Welcoming Schools project in Northern Ireland which supports leaders interested in creating more welcoming schools by leading from an inviting perspective. The more practitioners hear about invitational leadership, the more the theory of practice seems to be embraced by practicing educational leaders.

The research into my and Billy’s leadership reveals the universal applicability of invitational leadership and suggests ways to live and lead invitationally in two very real and very different school communities.

**Discussion Point 11**

The next key discussion point is that two good principals doing good things significantly changed their communities.

As self-congratulatory as may seem, this dissertation provides two tangible examples of the influence of school leadership on the communities. St. Stephen’s became an inviting community as teachers and parents committed to living educationally and encouraged students to do the same. The East Belfast community was challenged by Billy’s invitational leadership to welcome programs and initiatives from outside of the community. His community could have carried on doing the same thing in the same way but instead, Billy invited the outside in and in doing so, began to change hearts and minds and challenge long held biases and dispositions.
Billy’s work within the East Belfast community was recognized throughout Ireland, the United Kingdom, and Europe as an example of what is possible from an inviting perspective. His work was intentionally inviting, and as such, East Belfast Primary was seen as a beacon of hope and an example of what could be to other schools.

**Discussion Point 12**

The final key discussion point is that invitational leadership is not easy to live, regardless of the context.

The foundational principles of invitational leadership theory may seem simple, logical, and even overly optimistic, but if it were easy, everyone would be doing it. A cynical and superficial look at invitational leadership might understand the theory as simply being nice to people. As this dissertation reveals, it is much, much more than that.

The realities of school leadership are complex as revealed by my leadership at St. Stephen’s in Southern Ontario and Billy’s in Belfast, Northern Ireland. A key component of living invitationally is constant reflection and refinement in order to improve self-perception and increase confidence. Instead of simply doing, an invitational approach encourages being. That will look different in different contexts. There can be a tendency to get caught up in the day to day, situation to situation realities of school leadership.

Billy could have had a safe and successful career if he had become a principal and simply perpetuated the norm. No one would have thought anything of it and all would be well. Instead, he chose to live the foundational principles of inviting theory and saw that manifest itself in the 5 Ps within East Belfast and throughout the community.

The research also revealed that it is not easy to change hearts and minds. Despite a caring, trusting, respectful, optimistic, and intentional approach to leadership, others within St. Stephen’s and East Belfast still resisted and opposed. There is a safety in
cynicism and a reluctance to change. Regardless of the leader’s commitment to living and leading invitationally, not everyone will embrace the approach and some will actively work against it. Billy was not welcomed with open arms in the community and some still regarded him with suspicion even as, or especially when, the President came to visit the school. As I reflect on my tenure at St. Stephen’s, I am proud of what we accomplished as a school and educational community, but recognize that not everyone embraced the inviting approach, despite it all. It does require a big commitment from an individual leader because it is a call to live rather than a call to act. It requires a strong sense of self as a person and a leader.

**Challenges to Invitational Leadership Theory**

Invitational leadership theory is not perfect and presents many challenges. Understanding and embracing challenges keeps the theory breathing. The idea of living invitationally from a caring core, trusting and respecting others, and being optimistic about the future appears to be a noble pursuit and one worth exploring further by educators. Living and leading invitationally continues to provide challenges to the educational leader.

It is difficult to get everyone within the organization and community to buy in to an inviting perspective. What happens if they don’t? There are always members of an organization who will resist change or whose predisposition is not optimistic, caring, respectful, or hopeful though all play a role in the organization. An inviting leader invites, lives, and leads and influences others to do the same. The commitment of all cannot be guaranteed but that does not mean the value of trying should be diminished.

The day-to-day realities of a school community provide regular challenges to an inviting perspective and many arise out of good versus good situations. The goal of all
leaders is to move those within the organization toward a common goal. There are always those who would prefer to go in another direction or remain stagnant. Teachers, educational assistants and parents may prefer to do things in a more traditional hierarchical way. Instead of inviting partnership and approaching from a caring core, contrary opinions on discipline, instruction, and community will always exist. Some may embrace an inviting perspective that trusts others and respects their contributions while others may yearn for the days of complete deference to the teacher in all matters.

The locking of our doors presents another challenge rooted in the reality of contemporary schools as does the collective agreements and contracts of the various units within contemporary schools is a further consideration for an inviting leader. Within St. Stephen’s elementary there are five separate collectively bargained units with unique considerations, terms and conditions. Respecting each contract and the individuals within the school while inviting all to openly participate and embrace an inviting approach to education can be difficult, but is most certainly worth pursuing from an inviting perspective. Standardized testing can present difficulties if the focus of the school is allowed to be fixed on scores rather than individual student success and community partnership.

A further challenge to invitational leadership is managing the idea that an inviting approach may not or should not include everyone. The reality of contemporary schools is that external influences and priorities can compete for the attention of the leader and contribute to the dilution of an inviting perspective. Simply put, the presence of some can negatively influence the pursuit of an inviting community. An inviting perspective keeps the six C’s of conflict resolution in mind when dealing with difficult situations with the goal of moving toward conciliation at all times. There are, however, situations and
individuals whose contribution to a school community is so overwhelmingly negative that it compromises an inviting school. The idea of suspending a student from school appears to run counter to an inviting approach, yet school principals are consistently faced with situations which require exercising the authority inherent in the position. Both Billy and I have faced situations in which we have made the difficult decision to suspend and thus intentionally disinvite a student from school. There are times when a strong disciplinary stance is required to maintain an optimal learning environment for all students and the challenge is how to do so in an inviting way.

Billy’s challenges in Belfast may appear larger, graver, and steeped in historical, cultural, and political biases yet he persevered as an inviting leader in the face of challenges which included threats of violence from paramilitaries. The courage that is required to live invitationally and create inviting schools appears to be a far greater task in East Belfast than St. Stephen’s. Decisions made at St. Stephen’s would not result in my having to check under the wheel wells of my car, and former principals in my community were never threatened with violence, let alone shot. However, a closer look reveals a much clearer and obvious binary situation in East Belfast than in St. Stephen’s. In East Belfast, there are fairly clearly defined opponents who are vocally and publicly opposed to each other as well as Billy’s inviting leadership. From their flags to their political views they clearly draw a line in the pavement and stand vehemently opposed to integration and inclusion with Catholics in East Belfast. In many ways, this distinction simplifies the decision making process from an inviting perspective, as Billy presents, the voice of reason and goodness while those in opposition are regarded as the voices of hatred and segregation. Taking a stand against such opposition is a natural one for an inviting leader such as Billy Tate. The enemy is clearly defined and the moral authority
to do good things and work toward peace provides Billy with the high ground from a moral and ethical perspective as the school leader responsible for influencing the children of East Belfast.

While the leadership at St. Stephen’s Elementary does not involve threats of physical violence and isolation, the challenges are much more subtle and nuanced. In many ways, it may be easier to rally against intolerance and prejudice in East Belfast than to rally everyone together in support of the creation of an inviting school when some teachers want to be left alone to do their job or parents want to go “back to basics” when it comes to instruction and discipline. Without a common enemy or clearly defined boundaries within a community it can be very challenging to create an inviting school.

This is not to diminish the enormous and courageous work of Billy Tate in East Belfast but rather to highlight the challenges inherent in the everyday in contemporary schools.

The reality of contemporary schools is that everyone within the organization comes with their own ideas and expertise about how things should be run which might not only be incongruent with invitational theory, but counter to. How to get those individuals to commit to an inviting perspective is a challenge that is not addressed in the literature but should be considered by invitational theorists. There will inevitably be frustration involved. How does an inviting leader persist?

When considering the leadership of Billy Tate in Belfast and what he was able to accomplish in the face of hostile and violent opposition it is fair for the reader to wonder if invitational leadership requires superhuman abilities. Billy telling opponents to his inviting perspective to “piss off” with a baseball bat may not be what most leaders are prepared to do. Courage is certainly required to lead invitational whether confronting paramilitaries in Belfast or navigating the subtle politics of St. Stephen’s, but can anyone
do it? It can be easy to take a stand when it is obvious but can be much more difficult to do so in a good versus good situation.

While I enjoy sharing evidence of success, there are situations where an inviting approach did not result in the outcomes I had hoped. The conflict with Mr. Jacobs I shared earlier in this dissertation is an example of an individual being unable to connect to an inviting perspective despite numerous attempts to invite him into the school and contribute to the creation of an inviting culture. While the six Cs provided a structured way to approach the conflict from an inviting perspective, I was never able to successfully engage him in embracing an inviting perspective. There were staff members whose opinions on culture, discipline, and pedagogy differed as well. While some came to embrace an inviting school, others, despite interventions, conversations, and attempts, found it difficult to change their philosophical approach. While I respected the contributions of all to the school, I did hope that some would have moved further along the continuum by the time of my departure after 5 years.

**Implications**

The discussion points above reveal the key conclusions that can be derived from the research. As Anderson (2006) points out, in order to increase the acceptance of autoethnographic research in the academy, it is important to analyze and make connections between the key findings in the research and the larger social issues. As an exploration of invitational leadership theory in practice, this research intimately reveals what invitational leadership looks like in practice. The key findings outlined above also point the way forward for educational leadership and future research.

The conclusions of this dissertation are not meant to define or quantify the applicability of inviting theory, but rather as a call to further action and research. Some
key implications of this research include:

1. Invitational leadership theory should be more widely considered as a theory of practice that can support school leaders and positively influence school communities.

2. Invitational theorists should seek opportunities to connect with practicing school leaders and publish more voraciously outside of the inviting education community in both academic journals and practitioner periodicals.

3. The influence of school culture should be at the forefront of educational decision making.

4. School boards should encourage mentorship that extends beyond the confines of the board and help school leaders make connections with mentors in different boards and potentially different countries to support school leaders free from political interference.

5. Autoethnographic research is a methodology that is well suited to connect with scholars and practitioners alike and can increase the possibility that the implications mentioned above are realized.

**Key Implication 1**

The first implication is that invitational leadership theory should be more widely considered as a theory of practice that can support school leaders and positively influence school communities.

Invitational leadership theorist John Novak shared with me an experience he had speaking at a conference about invitational leadership theory. There were 300 or so attendees, though he couldn’t help but wonder why there were not 3,000 (J. Novak, personal communication, October 25, 2012). There can be a feeling amongst those who
have embraced invitational theory that it is a theory of practice that has a tremendous impact on staff, students, and a community. So why is it not more widely embraced within educational communities? Perhaps, as referenced above, it is not as easy to live as it is simple to understand. Inviting leadership requires, for some, a change in thinking and being which is hard to do.

Sharing invitational leadership theory is important academically, and it is also important within schools, boards, and districts. The examples of the impact of inviting leadership as told through my leadership at St. Stephen’s and Billy’s at East Belfast provides ample evidence of the potential to positively influence communities and contribute to student success. Embracing opportunities to talk about invitational leadership beyond the academy so that practicing school leaders can consider is important.

Key Implication 2

The second implication is that invitational theorists should seek opportunities to connect with practicing school leaders and publish more voraciously outside of the inviting education community in both academic journals and practitioner periodicals.

There is a growing community of invitational school leaders and theorists who gather annually at the International Alliance for Invitational Education conference and contribute to the Inviting Schools Journal with articles and research. Invitational theorists should embrace opportunities to publish and speak more outside of the invitational community to introduce more scholars and professionals to inviting leadership theory. John Novak contributed a chapter on inviting leadership to Brent Davies’s (2009) book *The Essentials of Educational Leadership* alongside many of the theorists explored in the literature review, but more needs to be done. I have published two articles on inviting
leadership theory outside of the invitational education community (Browne, 2010, 2012), and co-published another in the Catholic Principals’ Council of Ontario magazine (Browne, Novak, & Armstrong, 2012) on inviting education. I also enjoy speaking about inviting theory from the perspective of both a researcher and practicing school leader.

My experience has been that every time I have the opportunity to talk about inviting leadership with academics or practicing school leaders, the ideas are embraced. I teach a leadership course at my school board and rely heavily on an inviting perspective which is well received by new and emerging leaders. Finding opportunities to speak to a broader range of educators from practitioners to scholars will increase the profile of inviting theory. Moreover, more attention should be paid to research articles aimed at scholarly journals outside the inviting community as well as articles targeting practicing school leaders. In order to influence more leaders and increase the interest in invitational theory, more attention must be given to those with access to practicing leaders, and scholarly journals.

**Key Implication 3**

The third implication is that the influence of school culture should be at the forefront of educational decision making.

So often school reform is focused on implementing new programs, strategies, and initiatives that are meant to increase student learning. If not considered carefully, the culture and climate of the school can take a back seat to the literacy initiative, numeracy strategy, or benchmark assessment collection. It is indeed very important to remain focused on good teaching strategies and using data to support programming and student learning. However, more attention should be given to the culture and climate of a school and the influence a school leader has on its creation.
A school should be a place where students want to come to every day, where teachers are excited to welcome them, and there is an optimistic feeling about what can be accomplished together. A school that exudes negativism or feels rushed or stressed does not promote optimum learning conditions for students. An inviting approach to leadership is rooted in a caring core, is trusting, respectful, optimistic, and intentional about it all. Students, teachers, and parents contribute to the establishment of a caring community of learners who actively promote educational living.

The research in this dissertation reveals the impact of an inviting approach on school culture and how that culture resulted in positive academic results at both St. Stephen’s and East Belfast Primary on both anecdotal and in-class assessment as well as standardized scores. As principals, we are called to first and foremost create a safe, nurturing environment where students can take academic risks and feel supported. The leader plays a large role in this. This dissertation provides ample evidence of the importance of culture to student success and should influence school and district leaders to put school culture at the forefront and work through all other initiatives, programs, and policies through an inviting perspective.

**Key Implication 4**

The fourth implication is as follows: School boards should encourage mentorship that extends beyond the confines of the board and help school leaders make connections with mentors in different boards and potentially different countries to support school leaders free from political interference.

As referenced above and in the literature review, mentorship done poorly is worse than no mentorship at all (Hansford et al, 2004). While formal mentorship programs exist in all school boards in Ontario under each school board’s leadership development
strategy, they are all internal programs and as such have inherent flaws. A mentorship program that partners experienced principals with rookie principals in the same board runs the risk of perpetuating the norm within the board as one principal counsels the other on how to navigate the system rather than how to personally grow as leaders (Bloom et al., 2003). Mentors may be more likely to try to cultivate leaders who are mirror images of themselves rather than supporting individual professional development (Allen & Eby, 2003). Moreover, internal mentorship programs have political elements to them as new principals may be less likely to admit their difficulties to a colleague who may have influence over their potential advancement (Daresh, 2001).

My relationship with Billy Tate as revealed in this dissertation makes a case for mentorship that is free from political interference, influence on career advancement, or perpetuating the existing norms of the organization. Billy had no influence over my career, knew no one in my board, and did not seem to care about how things might play out for me politically. As a result, advice was free from political bias and was more focused on contributing to my development as a leader rather than how to navigate the system. School boards and districts should consider mentorship programs that reach beyond internal to other school boards, districts, and even countries. The development of partnerships and relationships around the globe can make a rich contribution to both the mentor and mentee. Supervisory Officers in school boards across Ontario participate in a formal mentorship program in their first two years and are paired with experienced superintendents in other boards. Perhaps this is something that should be explored further if school boards are truly interested in providing school leaders with opportunities to grow personally and professionally.
**Key Implication 5**

The final key implication is that autoethnographic research is a methodology that is well suited to connect with scholars and practitioners alike and can increase the possibility that the implications mentioned above are realized.

Facts seem to be forgotten easily but stories remain in our conscious and subconscious memories (Pink, 2006). Stories can illuminate, educate, and connect the reader with the phenomenon in intimate ways. Our minds seem to retain information as regaled through stories which allows for deeper reflection and consideration (Pink, 2006).

Educators love telling stories, especially with other educators, however, research and reflection that contributes to educational literature and practice should be thoughtful and reflective rather than simply the sharing of war stories. An autoethnographic approach to educational research utilizes the narrative to come to a rich understanding and encourages thoughtful reflection and consideration.

The number of autoethnographies has increased steadily over the past twenty five years and looks like it is continuing to do so in education as well. Scholars should be considerate of the best way for their research to reach practitioners and an autoethnographic methodology has the potential to connect intimately with the reader and encourage thoughtful reflection.

Education is more than what happens in schools and the intricacies of the realities of contemporary education can be explored thoroughly through an autoethnographic lens. Looking at educational leadership from the inside in this dissertation not only provides a unique perspective for the reader, but the on-going reflection on the research contributed significantly to my practice. The methodology of this paper combines autoethnography, interview and observational research to reveal the realities and impact of invitational
leadership. Amalgamating my story with Billy’s in a way that not only reveal his stories and experiences but the way in which they influenced my practice is a non-traditional form of qualitative research that presented challenges. My hope in presenting this methodology is that it provides a potential framework for future discussion and research as a new way of doing things. Not only is the work on inviting leadership contributing to the literature, but the methodology is unique and will hopefully contribute to future studies and literature as well.

Challenges to Identifying Challenges

Research presents challenges that must be acknowledged by the author as having influenced or the potential to influence the process and the work. Issues of bias, identification, and ethical considerations were addressed with the appropriate organizations as outlined in the methodology. However a significant challenge that was not part of the methodological discussion is the connection between my immediate supervisor and the theory being presented and discussed within this paper. As this paper culminates, it is important to acknowledge this tension as it pertains to the conclusions.

Dr. John Novak is one of the originators of invitational theory and is certainly one of the theory’s most vocal advocates as an author, professor and speaker. He is also my doctoral supervisor. As a researcher it is my responsibility to evaluate the data and consider the stories and point out challenges and future considerations for both the theory and for educational leaders. However as my supervisor, Dr. Novak has the most direct influence on the successful completion of my doctoral work and this dissertation specifically. This can be regarded as a challenge to the identification of challenges as I endeavor to confront honestly the theory applicability and effectiveness in a productive way. How do I manage this tension as a researcher and soon-to-be graduate?
Confronting this difficulty inherent within this work through this acknowledgment allows the reader to consider potential bias when evaluating the conclusions and assertions. I have chosen to live and lead an educationally inviting life and the results are found within the stories in this dissertation and their influence on my leadership and the impact on the school community. The influence of an inviting perspective is further shared through Billy Tate’s stories of inviting leadership. The results reveal events, experiences, and public recognition stories that reveal the implication and influence of invitational theory on both school leaders and communities. The reader is always free to make decisions about the author and this amalgamated methodology embraces that as it recognizes the interpretations of the stories and experiences may vary from reader to reader. The discussion and consideration of invitational theory as a theory of practice in contemporary schools is the most important aspect of this paper and ultimately what I hope will lead to further discussion and consideration by educators.

I am also confident in the relationship I have developed with Dr. Novak over the years as a scholar and individual of integrity. I have been encouraged to challenge his ideas from the very beginning and Dr. Novak has provided a positive example of the importance of humility. I have always felt very open to critique and debate with Dr. Novak and have felt not only respected but encouraged to do so. One of Dr. Novak’s sayings is that if theory is regarded as perfect then the theory is dead. For invitational leadership theory to be a living theory of practice it needs to be discussed, criticized and analyzed in order to evolve.

The Way Forward

Students remember educators who connect on a human level and develop relationships (Wascisko, 2012). Over 75% of students claim to remember teachers and
instances of human connection as being important to their development as students rather than the perception of pedagogical competency (Wascisko, 2012).

Wascisko’s research is supported by my own experience as my tenure at St. Stephen’s came to a close after five years as the principal there. Students from grade 5 put a book together for me as a going away present. The bound book asked each student to answer the question: “What is your favourite memory of Mr. Browne?” The book was filled with pages of student reflections on their memories of my leadership from their perspective. I was the only principal they remembered as I had known them since they entered grade 1. Many of the students’ reflections focused on our annual project in support of Bethany Kids Hospital in Kenya and my visits there to connect our communities. I was delighted that so many students felt such a strong connection as our work with Bethany was a big program every year and students felt very proud of their work and commitment. What I was surprised about, however, was the number of students whose favourite memories were not large scale or big picture, but were rather very small details. They revealed favourite memories to be my morning greetings each day at the kiss and ride, the time I read a student’s name over the PA system the morning after he won his event at a track meet, the fact that I knew every student by name, greeting students in the hallways with a “hello” or “good morning”, and my knowledge of their passions and pursuits outside of school. I know that details matter and the culmination of small things contribute to the big picture, but having it broken down so wonderfully by 56 grade 6 students revealed the power of human connections. Students said they felt welcome, important, and valued by these simple daily human connections. An inviting perspective suggested I be reflective on people and how to connect with them better. I had committed to leading invitationally 5 years earlier when I felt underprepared
and overwhelmed by the role. Five years later, the gift by the grade 5s confirmed the importance of an intentionally inviting perspective.

Leadership matters. There are a plethora of authors and theories devoted to the subject and supporting leaders is vital to the success of future leaders. Mentorship programs are established to support new school leaders but can be limited and stifle change and creativity as they perpetuate the existing norms. An autoethnographic look at school leadership through the eyes of the author, a new school leader, reveals a journey of discovery, reflection, and mentorship from St. Stephen’s to East Belfast and my connection with Billy Tate. The autoethnographic methodology allows for the presentation of the interviews and experiences in Belfast and how they impacted upon me and influenced my approach to school leadership. This methodology also encouraged the reflection upon the evolution of my leadership and the influence of the mentor/mentee relationship I developed with Billy Tate and how that became revealed upon my return to St. Stephen’s. The research tells my story of telling Billy’s story which reveals the universal applicability and influence of an inviting perspective on contemporary schools.

**Conclusion**

I began this study and my tenure at St. Stephen’s unsure of how to lead a school community. By committing to leading invitationally and reflecting on the process, I recognize how far I have come. I decided to do things on purpose for purposes that I could defend and make decisions grounded in invitational theory. While I began to recognize the influence of inviting theory on my practice, I connected with Billy Tate in East Belfast who was similarly influenced by inviting theory and creating an inviting school where no one would expect one. I grew in confidence, appreciated Billy’s mentorship, and mourned his passing shortly after my visit to East Belfast. As my tenure
came to an end at St. Stephen’s, the celebrations, surprise parties, cards, and sentiments helped me to realize how far we had come as a school community and the influence invitational theory had on the process. As staff, students, and parents not only began to live invitationaly, they also used the language of intentionally trusting, respecting, caring, and being optimistic about the future. An inviting perspective infiltrated the entire community and as I left, I did so optimistic about the way forward without me.

Ideas matter and the ongoing commitment within the academy and throughout school boards around the world to new ideas is an important pursuit. These ideas flourish when they are implemented and considered from within the context of living schools, active students, engaged parents, and committed leaders. Invitational leadership theory has made a significant contribution to the leadership of an emerging school leader such as myself who may yet move on to further leadership responsibilities within the board and beyond with a commitment to doing so from an inviting perspective. While Billy is no longer with us, his legacy remains at East Belfast and throughout Northern Ireland as a courageous educator willing to live invitationaly when doing so meant certain hardships and difficulties. As I write this, the “Welcoming Schools” project in Northern Ireland has officially launched promoting cross-community relations and peace through schools in Northern Ireland. Billy’s ideas and convictions were enormous and noble and his commitment to invitational leadership formed the basis of his ability to see them through when everyone told him it was impossible. He tried things no one had tried before and pushed the boundaries within the community by intentionally caring, trusting, respecting, and being optimistic about the future. As the Welcoming Schools project began in earnest in the fall of 2011, Billy was no longer around. Though he was not directly
connected to the project conception, I have little doubt that he would have embraced it and sought to be involved or to connect it with the East Belfast community.

Further consideration by academics, school boards, and school leaders for invitational leadership theory must be considered given the substantial evidence of the enormous impact it has made in two very unique communities through two different yet ideologically similarly school principals who heard about inviting theory, found out more, and committed to living the idea while inviting others to join them.
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Appendix

Glossary

**Apprentice Boys** – A Protestant fraternal society originating in Derry with groups throughout Ireland and the UK committed to the commemoration of the 1689 siege of Derry by William of Orange against James II. The Apprentice Boys originated the parades to commemorate this victory which continue to this day and have caused and continue to cause violent clashes and reactions when they march through Catholic sections of town.

**Catholic** – Referring to a member of the Roman Catholic Church. In Northern Ireland a Catholic is usually, though not exclusively, considered a Republican interested in a united Ireland consisting of all 32 counties.

**Estate** – A housing complex in the United Kingdom consisting of compact, usually connected town homes and apartment buildings. Each estate usually centers around a community centre and playground or park. Estates are traditionally populated by low income to lower middle class income families. Estates are largely sectarian and are either Catholic or Protestant in Belfast Northern Ireland.

**Falls Road** – A road in West Belfast populated by Catholics that marks the entrance to the Catholic section of Belfast. It runs parallel to the Shankill Road (Protestant section of Belfast) divided by a large barrier along the road long considered to be a “no mans land” in reference to World War 1 trench warfare.

**Fenians** – A group of Irish Republicans who first committed to armed military struggle against Britain in the name of Irish independence. The term is used with pride by some Republicans and as a derogatory comment by Unionists.
**Gaelic Athletic Association (GAA)** – The formal organization governing the ancient Irish games of Gaelic Football, Camogie, and Hurling. The association also promotes Irish dancing and the Irish language. The playing of Irish games was banned by the British for many years and the playing of the games was seen as an act of defiance. The games are now enormously popular in all 32 counties and the players are sports superstars in Ireland. Croke Park in Dublin, the traditional home of GAA (and site of the original “Bloody Sunday” in 1920 where British soldiers opened fire on the crowd at a match killing 12), regularly hosts crowds of 80,000 for hurling and Gaelic football matches.

**Hurling** – An ancient Gaelic game played with sticks (hurleys) and a ball (sliotar) and is thought to have pre-historic roots.

**Irish Republican Army (IRA)** – An Irish revolutionary military organization committed to an independent Ireland consisting of all 32 counties on the island. The group descended from the Irish Volunteers during the Easter Rebellion in 1916. The IRA has claimed responsibility for countless bombings and the killing of hundreds of people in Ireland and the United Kingdom. Though the IRA has officially decommissioned their weapons after the Good Friday Agreement in 1998 and committed to supporting their goals through political and peaceful means, splinter groups have refused to give up the military struggle and continue by distinguishing themselves as the “Real IRA” or the “ Provisional IRA” or “Provos”.

**Loyalist** – Referring to a person who is “loyal” to the British crown and consider themselves to be British citizens. A loyalist considers Northern Ireland to be part of the United Kingdom and does not want a formal connection to the Republic of Ireland or for Northern Irish affairs to be governed by Dublin.
Northern Ireland – Consists of six of the nine counties of the province of Ulster -
Tyrone, Armagh, Fermanagh, Antrim, Derry (Londonderry), and Down make up the
country of Northern Ireland, a self-governing member of the United Kingdom located on
the island of Ireland. Local affairs are governed at Stormont, the site of Northern Irish
Parliament, though still subject to governance from Westminster. Though the UK has
governed directly and has suspended parliament during times of trouble and upheaval, the
country is largely governed in a “hands-off” manner from Westminster.

Orange Order – A Protestant fraternal organization committed to the maintenance of
Protestant social and political power. Originally started in Armagh Northern Ireland, the
group boasts orders in Scotland and America. The “Orange” refers to the
commemoration of the victory of William of Orange over James II at the Battle of the
Boyne. The order is considered a sectarian unionist group and plays a large role in the
annual parades commemorating the Battle of the Boyne.

Paras (Paramilitary Groups) – A short form of the term “paramilitary groups” usually
referring to Protestant Loyalist military organizations. “Paras” are organized groups
originally formed as protection against Catholic Republican organizations such as the
IRA. Paras wielded political and social influence in Protestant areas in the north, though
influence is diminishing with the peace process. Usually consists of volunteers who
organize themselves in a hierarchical military fashion.

Police Service of Northern Ireland (PSNI) – The police service that was formed out of
the Good Friday Agreement. Taking over from the Royal Ulster Constabulary, largely
considered a loyalist unionist police force, the PSNI was established as a power-sharing
organization which equally employs Catholic and Protestant police officers. Though
many Catholics now work for the PSNI, the service is still treated with suspicion by many Catholic Republicans in Northern Ireland. The PSNI employs a third party security service to help protect the peace officers due to threats and violence perpetrated against members of the PSNI by paramilitary and republican groups.

**Protestant** – Referring to a member of one of the Protestant Churches of Ireland such as the Church of Ireland, Presbyterian, Brethren, or other Christian denominations not associated with the Roman Catholic Church. A Northern Irish Protestant is usually, though not exclusively, considered a Loyalist Unionist and loyal to the British crown.

**Provos (Provisional IRA)** – A dissident group formally associated with the IRA, provos have splintered off from the formal leadership of the IRA and have committed to continuing the armed struggle for Irish independence.

**Real IRA (RIRA)** – An ultra-violent dissident group formally associated with the IRA who splintered off from the Provisional IRA after becoming frustrated with the leadership and their willingness to hand over their arms and give up the armed struggle. The Real IRA claimed responsibility for the Omagh bombing in 1998, the most deaths attributed to the Troubles since they began in 1969.

**Republican** – Refers to someone who is committed to the Republic of Ireland governing all 32 counties in Ireland from Dublin and the elimination of Northern Ireland as a separate government entirely.

**Republic of Ireland** – An independent country consisting of 26 of the 32 counties in Ireland or five sixths of the island of Ireland. The Republic was officially recognized as an independent state after partition in 1921.
**Royal Ulster Constabulary (RUC)** – The name of the police force in Northern Ireland from 1922 until 2001. The RUC was constantly accused by human rights organizations as being discriminatory to Catholics and in collusion with Loyalists. Made up virtually exclusively of Protestants, the RUC was hailed by Loyalists and distrusted by Catholics. The RUC was a consistent target of the IRA killing over 300 people and wounding over 9,000.

**Sandy Row** – A Loyalist housing estate located in East Belfast. Fiercely Loyalist section of Belfast marked by murals of men in balaclavas and AK47s.

**Shankill Road** – A main artery road in central Belfast through a predominantly Protestant working class neighbourhood. The Shankill Road is situated close to the Falls Road, a predominantly Catholic working class neighbourhood. The road gained fame and notoriety throughout the Troubles as the centre of Protestant resistance to neighbouring Catholics with gangs such as the Shankill Butchers. The area between The Shankill Road and Falls Road has long been considered “no mans land” throughout the Troubles and the large partition wall remains to this day.

**Sein Fein** – A political party rooted in liberalism and Irish Republicanism and long considered the political wing of the Irish Republican Army. Translated to mean “we ourselves” or “ourselves alone”, the party has long advocated for the unification of all 32 counties in Ireland. The party leadership is occupied by acknowledged former IRA members such as Gerry Adams and Martin McGuinness who played integral roles in the Good Friday Agreement and are currently members of the power sharing government in Northern Ireland.
**Stormont** – The name of the estate in which the Northern Ireland Assembly sits in Belfast. Northern Irish Parliament is often simply referred to as Stormont.

**Ulster** – One of the four provinces of Ireland, Ulster consists of nine counties, three of which – Cavan, Monaghan, Donegal are part of the Republic of Ireland, while six of which – Tyrone, Armagh, Down, Antrim, Fermanagh, and Londonderry (referred to simply as “Derry” by the Republic) make up the country of Northern Ireland.

**Ulster Defense Association (UDA) or Ulster Defense Force (UDF)** – A Loyalist paramilitary organization in Northern Ireland which is officially considered a terrorist organization by the United Kingdom. The UDA declared a ceasefire in 1994 but attacks of Catholics and Republicans continued until officially ending its armed campaign in 2007.

**Ulster Scots** – Refers to the dialect of English spoken in parts of Northern Ireland and Donegal which is a combination of English, Scottish dialect, and Irish. Linguists have argued for the recognition of Ulster Scots as a distinct language, but that distinction is debated. It is considered to be a dialect of English by some and a distinct language by others.