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# Inspiring Change: A Hermeneutic Phenomenology Exploring the Lived Experience with Emotional Labor by Female Health Champions Implementing Comprehensive School Health Reforms

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UNIVERSITY OF CALGARY

Inspiring Change: A Hermeneutic Phenomenology Exploring the Lived Experience with  
Emotional Labor by Female Health Champions Implementing Comprehensive School Health  
Reforms

by

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A THESIS

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### **Abstract**

This hermeneutic phenomenological study explored the lived experience with emotional labor of five female Health Champions as they navigated through flux and systemic instability while implementing Comprehensive School Health initiatives. Framed by complex adaptive systems theory, the purpose of this study was to discover the immediate emotional and embodied experiences identified by five change agents having horizontal differentiation of roles including: pre-service student teacher, educational assistant, teacher, school leader, and system leader while undertaking educational reforms introduced between 2009 and 2016 in Alberta, Canada. This study uncovered insights into their common understanding the phenomenon of emotional labor while implementing the Comprehensive School Health framework, a reform to Physical and Health Education that coincided with the *Inspiring Education* movement. The findings of this study include: insight into the unique nature of the emotional work of change agents in educational settings; a phenomenological example of a possible lived experience with emotional labor; and suggestions for areas of future study for educational leaders interested in implementing Comprehensive School Health initiatives.

*Keywords:* Health Champions, emotional labor, Comprehensive School Health, hermeneutic phenomenology, school leadership, complex adaptive systems.

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This study explored the lived experience of change agents as they navigated through the “cusp of change” (Kowch, 2016, p. 498) to implement change in a school system. Kowch (2016) described the cusp of change as the space between the adoption and amplification of new structures and norms during the implementation of innovation in complex adaptive systems. During this hermeneutic phenomenological study, I discovered the common and unique emotional and embodied reactions identified by five female Health Champions holding multiple system roles including: pre-service student teacher, educational assistant, teacher, school leader, and system leader. These change agents have recently implemented Comprehensive School Health projects in response to the *Inspiring Education* curricular reforms introduced between 2009 and 2016 in Alberta, Canada. I uncovered several interesting insights into the experience of emotional labor (Hochschild, 2003), the dissonance between actual and organizational appropriate emotional expression, related to change agents and the impact of this experience on their implementation of Comprehensive School Health.

### **Problem Statement**

In 2010, the document entitled *Inspiring Education: A Dialogue with Albertans* (Alberta Education) produced a new vision for the future of Alberta’s educational system. This document was the result of a comprehensive consultation with educational stakeholders and outlined a different direction for teaching and learning in the 21<sup>st</sup> century from the present (Alberta Education, 2010). It detailed important reforms that challenged the dominant practices of educational actors – teachers, school leaders, system leaders and support staff – suggesting that “an informed transformation of our province’s education system is required to prepare our children for tomorrow’s world” (Alberta Education, 2010, p. 39). This policy directive generated



a number of changes to the current system including curriculum re-design from outcome-based curriculum to competency-based standards (Alberta Education, 2014), a slogan for schools to create “engaged thinkers and ethical citizens with an entrepreneurial spirit” (Alberta Education, 2011, p. 2), increased emphasis on technological integration into the classroom (Alberta Education, 2010), and a movement from teacher-centered to student-centered instruction and assessment (Alberta Education, 2010).

Because of these policy documents, school communities in Alberta were expected to make fundamental shifts to their curriculum design, student assessment collection and reporting, staff decision-making models, and instructional practice within a short time frame. Students, teachers, and school leaders were given many policy documents, and some professional development on the best way to implement these sweeping reforms. The policy-makers appeared to rely on the existence of classical management-style, top-down authoritative bureaucracies (Nuygen & Crow, 2013) to ensure smooth implementation. The school principal, a gatekeeper (Kowch, 2013) in K-12 school settings, appeared to be left with the responsibility of interpreting and directing the policy reforms.

One of the reforms associated with this movement was the development of the Wellness Framework (2009) that promoted a more holistic model for teaching Physical Education. This Framework suggested that “acquiring the knowledge, skills, and attitudes necessary to develop healthy habits for life is a critical component of student wellness” (Alberta Education, 2009, p. 1). Although the current Health and Physical Education Program of Studies (Alberta Education, 2003) provided several outcomes to address student wellbeing, in general, the implementation of this curricula by practitioners was generally sport-based and seen as not addressing the concerns related to youth obesity (Alberta Education, 2009). Of particular importance, discussed further in

Chapter Four, was the suggestion in the document that the best way to impact student health behaviors was through taking a Comprehensive School Health Approach to address student wellbeing. Comprehensive School Health was not a well-known framework in 2009 to practitioners in the field, so several organizations including the Health and Physical Education Council (HPEC) of the Alberta Teachers Association, APPLE Schools, EverActive Schools, and departments within Alberta Health Services were tasked with promoting this approach to educators and schools (Arnold, Patton, Pearce, & Whellams, 2012).

Comprehensive School Health (CSH) is an internationally renowned framework that situates student wellbeing as the central aspect of school culture to promote health as a multi-dimensional concept (Arnold et al., 2012; Avison, 2008; Propel, 2012). Rather than defining health as merely the absence of disease, this framework used the World Health Organization definition that health is “a state of balance, an equilibrium that an individual has established within himself and between himself and his social and physical environment” (Sartorius, 2006). This fundamental change in the understanding of health made space for health promotion to move beyond fixing an individual’s illness in a healthcare setting to engaging with community partners to advance health in all settings, with focus on schools (World Health Organization, 1997). Improving school health required taking networked approach between multiple partners to promote wellbeing through the social and physical environment, teaching and learning, healthy school policy, and partnerships and services (Avison, 2008). In Alberta, Physical Education specialists were potentially natural change agents to implement this approach in schools, so including reference to CSH in the Wellness Framework, a curricular document, was a key aspect of ensuring that health promotion became embedded into school culture.

As the uncertainty about implementing the comprehensive *Inspiring Education* reforms mounted, the Alberta Teachers' Association (2012) developed the research update, *A Great School for All: Transforming Education in Alberta*. This document called for assistance, resources, and distributed leadership to ensure thoughtful implementation of the *Inspiring Education* reforms. The intensity of emotion grew as some educational actors became concerned about the impact of these sweeping reforms on the norms of schooling, teaching and learning. Teachers appeared to feel the burden of changing the system after the release of the report by the Task Force on Teaching Excellence (Task Force on Teaching Excellence, 2014) – a report interpreted as an attack on the teaching profession (Alberta Teachers Association, 2014). The tension culminated in the 2014 loss of confidence vote by the teacher delegates to the annual ATA convention (CBC News, 2014) in Jeff Johnson, the Minister of Education at the time.

Through the flux generated by new policies, conflicting documentation, and controversy, educational actors in a variety of organizational roles have taken on reform leadership while simultaneously trying to understand new ideas and determine practical ways to implement them. These change agents have played a crucial role in transforming policy into practice and advocating for the implementation of different reforms. In health-related reforms, these change agents have become known as Health Champions, dedicated individuals who have advocated for implementing Comprehensive School Health in schools (Avison, 2009).

As of the present, many of the reforms of *Inspiring Education* (2010) continue to be pursued in school settings, and educational actors continue to be involved in sense-making as they adjust to their ever-evolving organizational realities. Sensemaking, or the act of rationalizing behavior within human organizations (Weick et al., 2005) involves coordinating and communicating appropriate responses in social contexts, and normally occurs

retrospectively. As change agents have made sense of organizational change, they might have experienced emotional labor – a dissonance between the actual emotional response of an individual and the projected, or acted, response (Hochschild, 2003). This study focussed on the experience of emotional labor generated by an *Inspiring Education* reform, specifically the effort to implement Comprehensive School Health in Alberta, Canada, to illuminate the emotional complexities present in school organizations. By drawing attention to the emotional experience of change agents involved in implementing reform, this study aimed to un-silence the critical influence of emotional labor as a complex adaptive system undergoes disequilibrium (Morrison, 2002; 2010).

### **Research Purpose**

In this research study, I explored the lived experiences of five female change agents holding multiple organizational roles (such as pre-service student teacher, educational assistant, teacher, school leader, and system leader) who were active during the period of 2010-2016, a time that could be described as the “cusp of change” (Kowch, 2016) for implementing Comprehensive School Health in the Alberta K-12 education system. I explored their perspectives as they reflected on this time of uncertainty to uncover their emotional expression during change, with attention paid to the intensification of emotional labor (Hochschild, 2003); to trace the emergence of acceptable and unacceptable emotional sensemaking experienced during reform implementation; and to identify the primary emotional influences that drove them to adopt, adapt, or reject the *Inspiring Education* innovations. The research study involved “doing phenomenology” (van Manen, 2014) as inspired by William Hegel, Martin Heidegger, Hans-Georg Gadamer, and Max van Manen. The results of this study focus on the phenomenon

of female educators' lived experience with emotional labor within the cusp of change to illuminate the role of emotions in complex adaptive systems.

### **Research Questions**

The guiding question for this research study was: What is the lived experience of five Albertan, female change agents holding multiple organizational roles (including pre-service student teacher, educational assistant, teacher, school leader, and system leader), as they reflected on the implementation of Comprehensive School Health, a reform that emerged from the *Inspiring Education* policy documents during the time period of 2010-2016?

Using the concepts of temporality, corporeality, spatiality, and relationality as the guides for experience analysis (van Manen, 2014), the sub-questions that guided my understanding and provided a phenomenological example of lived experience are:

- How did the educational actor describe her experiences with the introduction and implementation of the educational reform?
- Based on her previous experience with implementing reform, how does she feel now about implementing future reforms?
- What was her immediate emotional and bodily reaction to implementing the innovation?  
Did she hide or express these responses in her professional life?
- What is the lived experience of emotional labor of change agents involved in implementing reform? How can this description of experience be beneficial to others hoping to reform school practices?

## Chapter 2: Critical Literature Review: Establishing the Horizon

To understand the lived experience of my research participants required me to explore the real and constructed contexts of this study. The constructed context lies within the framework of social constructivism and complexity theory, as schools are human constructs and reforming human institutions can create systemic instability that could evolve into uncertain outcomes. The real-world context to be explored is the concrete manifestations of schools in Alberta as impacted by *Inspiring Education* reforms. These schools are staffed primarily by female educational actors who comprise most of the professionals in schools (Statistics Canada, 2015). Overall, 19% of women with post-secondary degrees work in the Education field with a further 13% working in the Health fields (Statistics Canada, 2011/2016), so of all women in Canada with post-secondary degrees, 33% can be found in the professions in Education and Health. Focussing on the emotional labor of female Health Champions becomes more important, given the high number of women working in these combined fields.

Unpacking the concept of emotional labor is necessary to establish my own expertise and authority (Gadamer, 1975) to understand the lived experiences of my participants. My understanding of schooling is that schools are socially constructed, complex institutions with an entrenched grammar of norms (Hargreaves, 2000), values, and expectations that have been under pressure to reform to reflect global ideas of 21<sup>st</sup> Century competencies. Educational actors are sentient *Spirits* (Hegel, 1977) who engage in emotional labor (Hochschild, 2003) as a key work expectation ensure effective knowledge-building and transmission within the school system. I assume that this emotional labor plays a key role in the adoption, rejection, or amplification of educational innovation, and that ignoring the emotional dynamic of educational actors could lead to organizational and personal anxiety. Schools are complex systems that are both responsive to,

and have an impact on, the daily work and decisions of individual members. These individual members can take on the role as a change agent within the system that can create new structures and practices thereby changing the system (Morrison, 2002). Each individual person labors to either hide or express professionally appropriate emotions while implementing system policies. Understanding the dynamic relations between the individual educational actors and the school system can provide context for the necessity of understanding emotional labor.

### **Complex Adaptive Systems and the Social Construction of Educational Institutions**

**Complex Adaptive Systems.** Educational theorists have moved towards an understanding of human institutions as learning systems. This movement has re-imagined the school as a complex adaptive system that both changes and is changed by its individual members (Davis, Sumara, & Luce-Kapler, 2014; Kowch, 2013; Morrison, 2002). Davis et al. (2014) suggested that complex adaptive systems are not easily deconstructed into individual, change-able parts that can be reliably reformed into a pre-destined form. Rather, organizations are self-organized and self-determined, meaning that the system will reform in response to external and internal stimuli, but the resulting system structure will be unpredictable because the humans involved in the system determine the outcome. Further, the introduction of change to one aspect of the system is likely to create disequilibrium (Morgan, 2006) – a state of uncertainty that prompts the members of the system to adapt to or reject the change to return to a state of equilibrium. Because this process of adaptation or rejection within one system cannot predict or be correlated to similar systems, making the same change to two similar systems would not necessarily generate the same outcomes. The possibility that the change sends the system in an unexpected direction needs to be considered.

Instead, tracking emergence (Hazy & Uhl-Bien, 2013) of innovative phenomena in response to disequilibrium (Morgan, 2006) can become the focus for re-formation of a system. Human systems are rarely in a steady state of equilibrium. Complex systems theory suggests that creativity is required on the part of internal actors to ensure that order is maintained (Jones, 2013). Spotting the emergence of order from the chaos or recognizing creative responses by the actors within a system to adapt states of flux, becomes a role of leadership interested in system reform (Morrison, 2002). Tracking the networked and dynamic interactions between institutional actors as they react to a reform is a necessary component to the overall smooth functioning of leadership in the system (Davis, Sumara, & D'Amour, 2012; Kowch, 2013).

**Educational Turbulence, Innovation and Relations.** Understanding the relations between system actors can assist with spotting the emergence of educational turbulence (Johnson, 2013) that influences the creativity of individuals working within cusp of change (Kowch, 2016). Johnson (2013) suggested that educational turbulence was the two-way interaction of macro-level policy change on micro-level teaching practice. She suggested seven micro-policy components of educational turbulence that can impede educational reform macro-policies. These components, including funding, assessment strategies, and the learning environment reveal that the everyday challenges and hindrances facing teachers can stall reform efforts. She further suggested that failure of well-intentioned macro-policy was more likely a result of educational turbulence than a system process or specific planning for the change to occur. The daily problems of teaching interfered with the effective implementation of the major policy. Understanding the lived experiences during a major policy change might assist with managing the educational turbulence described by Johnson.



Kowch (2016) described the cusp of change as the space between disequilibrium and amplification of change in a complex adaptive system. This volatile space emerges in response to the introduction of a change that created a state of flux. The internal actors respond to this state of flux by working to re-establish organizational order – in doing so, they might innovate to produce novel solutions. If the innovations are sustainable, then the system will retain the reforms and stabilize in a new form. The amplification of the change occurs when others determine that the new state established in the system is worth copying. He suggested that recognizing the emergence of innovation and creative responses during this disruptive and tense time was a function of educational leadership.

The relations between actors could play an important role in the adoption of innovation as they decide whether to spread the new system to other networked actors. Relations can be defined as the networked connections between actors within a complex system (Kowch, 2013; Morrison, 2002). Educational actors would be described as the students, teachers, principals, parents, and system leaders who interact together to create an institution designed for teaching and learning purposes. As they navigate through systemic flux, these individuals also experience instability at a personal level.

Flux can be felt at the individual level of the spirit, the inner world of a person (Hegel, 1977). Hegel (1977), in *Phenomenology of the Spirit*, described flux as the recognition of the universal difference between the external and internal world of the spirit, and the drive of the troubled spirit to resolve these differences (p. 90). When confronted by the universal difference between the world and the self, the spirit strives to return to its previous tranquil state. Only an inner resolution between what is known and is unknown can settle the state of flux, with the outcome creating a new appearance of stability:

The inner being is, to begin with, only implicitly in the universal; but this implicit, simple *universal* is the outcome of the flux itself, or the flux is its essence; but it is a flux that is posited in the *inner* world as it is in truth, and consequently, it is received in that inner world as equally an absolute universal difference that is absolutely at rest and remains selfsame. In other words, negation is an essential moment of the universal, and negation, or mediation in the universal, is therefore a *universal difference*. The difference is expressed in the *law*, which is the *stable* image of an unstable appearance. Consequently, the *supersensible* world is an inert *realm of laws* which, though beyond the perceived world – for this exhibits law only through incessant change – is equally *present* in it and is its direct tranquil image. (pp. 90-91)

The flux or disequilibrium experienced by change agents during educational reform can create emotional labor (Hochschild, 2003) as they uncover the grammar of educational institutions (Hargreaves, 2000). If the grammar of schooling differs from the reform they are charged with implementing, change agents must navigate the uncertainty felt in the cusp of change while advocating for a reformed system. For a change agent, the vision of a reformed system could be a driving motivation to continue with their important work (Morrison, 2002).

### **Unpacking the Entrenched Grammar of Schooling**

The fundamental principles of schooling that define the boundaries of teaching and learning within educational institutions are the grammar of education (Hargreaves, 2000). The image of silent classrooms presided over by the mean, owl-glassed, female teacher in a tweed suit has developed into a narrative of how schools *are*. This view has been described as the Standard Moment of Education (Davis et al., 2014). Davis et al. (2014) suggested that in Standard Education, students are understood to be empty vessels to be filled with the vast

knowledge of teachers who are expected to ensure that a uniform delivery of content results in a basic uptake of knowledge by everyone. This grammar continues to be reinforced through popular conceptions of teaching, learning, and schools. Popular movies, such as *Bad Teacher* (Sony Pictures, 2011) and *Billy Madison* (Happy Madison, 1995), or television shows such as *Saved by the Bell* (NBC, 1992), *Boy Meets World* (ABC, 2000), or *Mr. D* (Canadian Broadcasting Corporation, 2016) portray teachers as lecturers and students as eager vessels who sit in rows and await the delivery of vital information. Although stereotyped portrayals of schools, these artifacts reflect the entrenched social expectations of educational institutions, and for educational actors could present compelling images of what should occur in schools.

Physical Education (PE) teachers suffer from highly negative media stereotypes associated with their labor. McCullick, Belcher, Hardin, and Hardin (2010) uncovered four themes in movies related to Physical Education teachers including: the suggestion that PE teachers do not actually teach; that PE teachers are interchangeable with coaches; that they are bullies and promote bullying amongst students; and that men and women are portrayed differently. Male PE teachers are portrayed as hyper-masculine and often lacking in intellect, and female PE teachers are portrayed as “butch lesbians” (McCulloch et al., 2010, p. 12), calling into question the sexuality of all female PE teachers. This stereotype might discourage women from entering, or taking on leadership in, a dominantly masculine field.

Fisette, Fisette, and Chase (2017) in their study of forty-three films from 1939-2012 found that the dominant portrayal of Physical Education Specialists was as overly masculine bullies who demean students through physical punishment. The environment of the gymnasium was often depicted as the place of bullying by a mean (or at best, indifferent) male or masculine female teacher who failed to care for the needs of their students. They suggested that this

portrayal served to undermine the importance of the study of Physical Education in schools and made removing it from school timetables and not hiring Physical Education Specialists much easier for district personnel not directly involved in schools.

Illuminating the traditions – in the case of this study, the grammar of schooling - surrounding the phenomenon under study can assist the self to identify its prejudices about that phenomenon (Gadamer, 1975). The grammar of schooling represents the historical reality of the self as it moves through its everyday reality, and “that which is sanctioned by tradition and custom has an authority that is nameless ... always has power over our attitudes and behaviors” (Gadamer, 1975, p. 292). Recognizing the media portrayals and cultural norms of educational actors could uncover the prejudices and fore-structures that the educational actor-self brings to its understanding of the experience of emotional labor.

Peeling back and clearly looking at the traditions of the Standard Moment in schools (Davis et al., 2014) reveals the adherence to the machine metaphor of organizations (Morgan, 2006). Morgan (2006) suggested that human organizations can be viewed as machines: the self is subsumed as a rational and efficient robot managed by respected and authoritarian leaders. In contrast to complex adaptive system theory, this view of human systems suggests that they can easily be deconstructed into smaller working parts that can be improved through an update in the technology or a re-training of specialized labor. This early understanding of organizations led theorists like Frederick Taylor (Brown & Papa, 2013) to develop the scientific management theory which placed an emphasis on bureaucratic division of labor and hierarchical decision-making. Managers were respected based on their expertise and were characterized and promoted according to their ability to make rational decisions without the interference of emotions (Brown & Papa, 2013). In early educational administration theories, educational actors, particularly those

in management positions, were expected to follow the norm of emotional silence (Blackmore, 2007; Harris, 2004) about the impact of their work on their personal state.

Scientific management and classical management theory legitimized policy as a primary driver for managing organizational change (Johnson, 2013). Because educational actors were expected to simply fall in line with top-down educational change as dictated by the hierarchy, little attention has been paid to the emotional turmoil that change generated in the humans engaged in creating the change (Harris, 2004). The post-modern professional, one who accepts the market-driven need to make human systems accountable to economic globalization (Hargreaves, 2000), would find a friendly place in the mechanistic bureaucracy of modern school systems. Despite growing pressure to reform education, the underlying metaphor of the organization as a machine could create a dissonance – the educational turbulence (Johnson, 2011) and emotional labor – between what educational actors *want* to do and feel to improve their student outcomes and what educators *can* do and feel during reform efforts.

### **Pressure to Reform – Global Changes and Economic Pressures**

The Global Education Reform Movement, known otherwise as GERM (Pasi Salberg, as cited in Hargreaves & Shirley, 2012), has had an enormous effect on Western education systems. The impetus to change appears to have grown from the development of the Programme for International Student Assessments (PISA) assessments in 2000 (OECD, 2008). These standardized tests, initially given to 15-year-old students in 60 different countries, were created to “measure how well students who are nearing the end of compulsory education are prepared to meet the challenges of today’s knowledge societies” (OECD, 2008, p. 80). The results of the standardized tests on numeracy, literacy, and scientific knowledge was then used to rank the world’s best performing educational systems – either a point of pride for those labelled as

excellent or a point of concern for those labelled as weak (Mourshed, Chijioke, & Barber, 2010). The publishing of the PISA results and McKinsey and Company's (2007) document, "How the World's Best Performing School Systems Come out on Top" appeared to ignite a global reaction to change their school systems to outperform other countries. Students *as data* became the measure of the performance of educational systems, and their wellbeing and individual concerns became less important than their measurable improvement in achievement data. Furthermore, this report highlighted that improved student outcomes resulted from the work of excellent teachers laboring under excellent school leaders, minimizing social justice issues, such as child poverty and health issues, as having a detrimental impact. Conversely, the global movement towards taking a Comprehensive School Health approach in schools intended to place the *student as person* at the forefront of school culture highlighting the influence of health on student achievement. The tension between these two ideas, *student as data* and *student as person*, are detailed further in this chapter.

Mourshed, Chijioke, and Barber's (2010) follow up article, "How the World's Most Improved School Systems Keep Getting Better" detailed the success stories of twenty different school systems and outlined a simple three step plan for other systems to follow for their improvement journey: "Assess current performance level. Select interventions. Adapt to context" (Mourshed et al., 2010, p. 27). To system leaders and societal members trained in the Standard Moment of Education or having a mechanistic view of human systems, educational reform on a large scale might have appeared straightforward, simple, and manageable. Improvement to student data was just a matter of changing teacher practices, because "the sustaining of practices of the new pedagogy is characterized by the internalization of teaching practices [in teachers]. They are not merely about changing the explicit structure and approach of the system, but how

teachers think about teaching” (Mourshed et al., 2010, p. 21). If the focus for educational reform was framed as a matter of changing teachers from good to excellent, the wider social context of necessary social justice reforms could be sidelined. A consequence of placing the spotlight on teaching and leadership excellence as the primary driver for student achievement success may have resulted in both an intensification of teacher work (Apple, 2009) and an intensification of the emotional labor (Hochschild, 2003) of educational actors.

### **Educational Actors and Emotional Labor**

The emotional labor of teaching has been a topic of research since the 1990s. For the purposes of this paper, I use Yamamoto, Gardiner, and Temuto’s (2014) definition of emotional labor as “the work that occurs within the person and other people to exhibit socially or professionally prescribed emotional displays even when what the person feels does not align with the expected or prescribed expression of emotion” (p.167). Although the very act of defining an experience can limit the self’s expression of that experience (Gadamer, 1975), shining light on this phenomenon requires a common definition.

The original description of emotional labor emerged from Arne Hochschild (2003), in her book entitled: *Managed Heart: Commercialization of Human Feeling*. Hochschild suggested that, in institutional settings, the emotional expression of workers was limited by socially constructed emotional rules. These rules played an important part in maintaining the integrity of the institution and defined the relations between workers. She described emotional labor as the dissonance between the true emotional experience of a worker and the allowed expression of said emotion while at work. This process mimicked drama as the worker could use surface acting to merely mirror the acceptable emotions of others while at work, or deep acting to mask or suppress inappropriate emotions and appear to have internalized the values of the institution.

Hochschild (2003) gave the following example to illustrate in the case of teaching: “to be warm and loving towards a child who kicks, screams, and insults you – a child whose problem is unlovability – requires emotional work” (p. 52).

Hochschild (2003) also suggested that determining which emotions could be appropriately expressed emerged from observing the claims of acceptable behavior made by others. Workers would manage their emotions through pain avoidance (not participating in emotional expression) or advantage seeking (use of emotional expression for personal gain). For workers to distinguish their true emotions from their enacted emotions would need a strong sense of self and their own values and beliefs. The greater the disparity between an individual’s self and their personal belief system and the institutional feeling rules – values and acceptable emotional expression – the greater the emotional labor of the worker. The intensity of emotional labor would be impacted by the social construction of meaning regarding institutional feeling rules in school settings.

The social construction of meaning was described by Hasan (2012) in the context of Vygotsky’s child development theory and Bernstein’s sociological theory as semiotic mediation. Hasan (2012) defined semiotic mediation as “the cultural mediation of mental development through semiosis” (p. 80) or that meaning-making by the human consciousness is constructed through language in discourse with others from a young age. He summarized this idea as “verbal interaction → meaning construes experience → experience construes mind” (p. 84). The interactions between people determined the meaning that they assign to the experience. Hasan described the social construction of meaning as humans having access to a large reservoir of social interactions, but that each person’s repertoire of individual experiences within this large context is limited. In an educational context, although educational actors might have access to



many interactions with others, they are limited by their actual experience to make meaning about their social context. To develop a common meaning about emotional labor would require developing a plausible account of this phenomenon in practice therefore potentially awakening the educational actors to other ways of looking at educational reform.

Because educational actors have spent a large amount of their time and training in educational institutions, they have internalized the norms, values, and expectations of schooling. Spicer (2012) attributed this internalization as a mechanism of ensuring teacher compliance with institutional norms which minimized the necessity of external coercion. During times of educational change, he suggested that educational actors re-contextualized reform texts to suit their current social context and understanding. Recontextualization is the process of taking a text (in this case, an educational reform initiative) and adopting only the parts of it that conformed to the current contextual norms. Parts of the text that did not suit the dominant discourses would be ignored or rejected. An educational actor's socialized internal locus of control would make instituting reforms very difficult in her institution.

Gadamer (1975) referred to the internal locus of control as preservation, "an act of reason" (p. 293), and a conscious decision by the self to maintain the current state or traditions during a time of reform. This decision to preserve the familiar occurred as often as to adopt the change, hence Gadamer placed an importance on uncovering tradition, systemic knowledge, and prejudices, individual knowledge, through dialogue if everyday reality was to be reformed.

Morgan (2006) referred to the situation of preservation as the internalized Plato's Cave. People within an organization would have a very difficult time recognizing the value of different ways of being because they are trapped within a psychic prison. They understand and value their own cave – the place in which they are comfortable and confident about the expectations and

culture – and as such, are either unwilling to leave their cave (for knowing nothing better and feeling strongly about the rightness of the norms in their cave) or do leave but are so changed that they are no longer recognizable by their former cave-mates.

In the case of schools, educational actors are trained in the grammar of schooling through being successful in educational settings for their entire life. To recognize the value of changing the familiar requires an ignition (Mourshed et al., 2010) that is so compelling that they will risk venturing into unfamiliar areas. In the case of teaching and learning, the ignition for implementing true change might need to be much more compelling than externally mandated policy because of the emotional labor associated with reform. Understanding the scope of emotional labor for each educational role (students, teachers, and leaders) is an important component of understanding their response to the cusp of change (Kowch, 2016). Isolating the phenomenon of change agents' experience of emotional labor during reform will require gathering diverse and different accounts of it. By looking at the phenomenon from people in widely divergent educational roles, I aim to describe a possible essence of this lived experience.

### **Uncovering the Emotional Labor of Educational Actors by Role**

**Student Emotional Labor.** As the epicenter of interest by the educational reform movement, *students as persons* bear the weight to achieve measurable and desirable outcomes to improve the status related to *students as data*. Although global change educational documents aspire to have a student-centered focus (Alberta Education, 2010a; Mourshed et al., 2010), the *student as person* is subsumed to an aggregate of data to determine measures of achievement. Therefore, in mapping how units are related, or “network relations” within complex adaptive educational systems, the closest tie to *student as data* is *student as person*. The job of the

student-as-person is to achieve the highest possible outcome on international tests to prove school improvement.

This separation of person from their test scores has the effect of disconnecting mental health from achievement, which is problematic (Suldo, Gormley, DuPaul, & Anderson-Butcher, 2014). Suldo et al. (2014) determined that a bi-directional relationship between positive mental health and academic achievement existed, and that students need to progress in both realms to experience school success. Further, their data indicated the “importance of the continual monitoring of mental health amidst the ever-evolving academic demands placed on students, as change may have mental health consequences for students” (p. 91). They found that externalized behaviors in elementary aged students led to cascading and internalized problems as children grew older. These internalized problems included anxiety and depression, both of which are gaining increased attention by schools as these conditions appear to be on the increase in children and youth (Nieman, 2015).

Dealing effectively with student mental health problems is best done with a whole school intervention (Grapin, Sulkowski, & Lazarus, 2015) which aligns with the social and environmental pillar of Comprehensive School Health (Avison, 2008). An important source of school social support for students is teachers (Conner, Miles, & Pope, 2014; Grapin et al., 2015; Suldo et al., 2014). Students have identified teacher warmth and support as correlated to their wellbeing as is having a sense that most or all of the teaching staff are concerned with their progress (Conner et al., 2014). Hence, the ability of teachers and other school personnel to enact socially appropriate deep feelings (Hochschild, 2003) about the *student-as-person* is a necessary component of student mental health.

**Teacher Emotional Labor.** The emotional labor of teachers is directly tied to their experiences and meaning-making with their students-as-persons. To make ethical and moral decisions in complex and unpredictable classrooms, teachers have been shown to rely on their understanding of what constitutes a “good” teacher (Keltchermann, 2005; Saunders, 2012). Teachers’ self-belief is closely tied to their personal values and their definition of what constitutes a good teacher (Keltchermans, 2005; Nias, 1996; Saunders, 2012). Educational reforms that challenge a teacher’s sense of self as a good teacher can generate negative emotions within a teacher. Keltchermans (2005) suggested that educational reformers should look closely at the interplay between teachers’ understanding of their self, teacher vulnerability, and school micro-politics as each plays a role in the teacher’s emotional response to change. Vulnerability, a structural condition that is centered at the heart of the teacher-student relationship, is associated with the feelings of guilt, anxiety, and fear that teachers cannot adequately bridge the knowledge gap between themselves and their students. She suggested that reforms that aim at the heart of teaching and create a greater sense of professional vulnerability can intensify the emotional experience of teacher.

The presence or lack of visible student progress (Chaar, Khamis, & Akkary, 2016; Kaniuka, 2012) can generate negative emotions such as anxiety and frustration in teachers involved in change efforts. Negative emotions are rarely displayed by teachers publicly (McClennan & Sader, 2012) which can result in emotional silence (Lynch, 2012) or emotional regulation which increases the emotional labor of teachers. In their duoethnography, McClennan and Sader (2012) noted that:

It's inappropriate for me as an educator in social justice and leadership work to work out my issues during class with my students... I must be an example of how to have the difficult conversation without losing control of who I am. (p. 153)

In difficult or crisis situations with students, teachers rely on their professional sense of self as the centering place to maintain emotional control. Their identity as a good teacher becomes the base of their ethical response when engaged in decision-making (Keltchermans, 2005). Reforms that challenge this central belief can cause deep anxiety for practitioners as they rethink what constitutes the heart of their teaching practice (Palmer, 1997).

Conversely, reforms that aligned with the teachers' beliefs of good teaching can increase emotional resilience and a willingness to push through negative emotions and persist with the reform (Nias, 1996). She found that "beyond the ordered control and professional calm of all the teachers...bubble deep, potentially explosive passions, emotions bringing despair, elation, anger, and joy of a kind not normally associated in the public mind with work" (Nias, 1996, p. 296). She suggested that the teachers' self was deeply linked to their daily work – and that the success of students generated joy when reforms worked and despair when students experienced failure. Nias (1996) attributed care as an undervalued element of the emotional labor of teaching, and that intrusions by other adults into the special relationship between teachers and their students created negative emotions out of fear of judgement or criticism from others. Further, she suggested that the more passionately a teacher felt about their commitment to personal values, goals, and beliefs about being a "good teacher," the more extreme their reaction to ideas that they felt threatened their self.

During reform implementation, teachers experience mixed and varied emotions throughout all the phases of change (Chan, 2016; Chaar et al., 2016; Harper, 2012; Mevareck &

Maskit, 2015; Saunders, 2012). Although teachers experienced anxiety when initially introducing a new concept or idea to their students, they felt concern again when assessing the impact of the reform on their student (Chaar et al., 2016). They were most likely to silence negative emotions such as frustration, anger, and anxiety unless they found themselves in a school climate that encouraged such expression (Hochschild, 2003; Saunders, 2012).

Establishing the school culture and climate has been associated with the role of school leadership (Leithwood & Seashore Louis, 2012; Robinson, 2011). The emotional climate established by school principals has an impact on teacher emotional journeys through implementing reform.

**School Administration/Principal Emotional Labor.** School leadership, particularly the position of principal, has a long history of being associated with hyper-rationality (Blackmore, 2004; Harris, 2004) and emotional silence (Lynch, 2012). The focus on efficiency and accountability in classical management theory (Nyugen & Crow, 2013) of educational leadership has kept the principalship in a gatekeeper role (Keltchermann, Piot, & Bullet, 2011) attempting to manage multiple stakeholder interests while keeping own emotional responses carefully controlled (Berkovich & Eyal, 2015; Keltchermans et al., 2011; Lynch, 2012; Yamamoto et al., 2014). As top-down reform efforts have created anxiety and frustration in staff members (Caruso, 2013; Harris, 2004), the principal has found herself isolated and alone in decision-making (Keltchermans et al., 2011). The very reforms intended to bring about increased collegiality and collaboration between educational actors (Hargreaves & Shirley, 2012) have had a reverse effect on principals who find themselves at a crossroads of competing stakeholder interests over scarce resources (Caruso, 2013).

The emotional life of a principal and assistant principal is not well studied (Berkovich & Eyal, 2015) indicating the dominance of rational choice theories in leadership (Brown & Papa,

2013). These theories suggest that principals make decisions based on rational thought and logical deduction and ignore the social construction of emotion in institutional settings. Given that school administration teams are expected to lead educational reform (Alberta Education, 2010b), the emotional journey of principals and their teams enacting reform merits consideration. Little has been studied of assistant principals' emotional labor indicating an area in need of further research. For this study, the emotional labor of principals is extended to the entire School Administration team, including the assistant principal role.

A common emotion associated with the principalship is structural loneliness characterized by isolation. Ketchermans et al. (2011) studied a cohort of Belgium principals who described the structural role of the principal as a decision-making gatekeeper. Often isolated by the demands of this hierarchical position, the principal is expected to act as a mediator between the school and the system's interests by balancing the expressed needs of the teaching staff with the policy directions handed down from the system. Principals are subject to the same sense of vulnerability to criticism as teachers, and they also associate their sense of self with their understanding of a "good leader" (Keltchermans et al., 2011). This understanding is constructed both by the teachers with whom they work, and the system expectations placed upon them. Having no structural colleagues, they expressed a sense of isolation when making critical decisions.

In his year-long case study of two principals engaged in critical decision-making, Caruso (2013) found that the subjects resorted to authoritarian, top-down leadership to combat teacher resistance. He mentioned the drive of both principals to remain "calm and in control" (p. 222) while attempting to navigate the uncertainty generated by budgetary change. Teacher and other staff morale plummeted in response to the centralization of decision-making, and the principals

found themselves further isolated from their colleagues. The emphasis on remaining in emotional and physical control of an uncontrollable situation reflected the hyper-rationality of the school leadership and the failure of the mechanistic bureaucracy to manage a difficult time.

Principals need to understand their own emotional labor to balance logic and emotion during difficult times (Yamamoto et al., 2014). The normal regulation of emotions to align with a situation is a key part of adulthood and plays a role in leadership. However, in their in-depth case study of ten principals engaged in critical decisions, Yamamoto et al. suggested that principals are not fully prepared by their training to take on the emotional labor associated with their role. They developed a four-themed model for school leaders to assess and understand their emotional responses when dealing with emotional disequilibrium. As with other studies, they determined that school leaders used their understanding of self and their worldviews when engaged in ethical decision-making. Once principals identified how the critical incident affected their perception of themselves as a leader, then they could do the difficult and important work of changing their practice. School and system leaders who understand that school improvement is an emotionally-charged experience (Harris, 2004) will have more success with educational reform.

### **The Great Unknown: System Leader and Educational Assistant Emotional Labor.**

**System Leader Emotional Labor.** Very little has been written about the emotional labor of system leaders. System leaders have a large, cascading effect on the work of other educational actors (Anderson et al., 2012) and their decisions tend to ignite school reform. Their role is often as a policy maker and politician, bringing the needs of the collective to the institution of schooling (Feuerstein, 2013). In the current study, system leader is defined as a person who generally works with school communities, but is not situated in school buildings, who mainly develops policy or provides resources and supports to ignite reforms. Largely having a political



role (Morrison, 2002), their own beliefs can play a very large role in the path of educational reform. They might see *students as data*, in aggregate, rather than *students as persons*, thereby beginning the entire chain of downward pressure to bear on their test scores (Feuerstein, 2013). The current study illuminates the emotional response of four system leaders while acting as change agents, and their experience of emotional labor associated with this role, providing a starting point for further research. The participants in this study recognized the tension between viewing *students as data*, their measure of system success, and *students as persons*, a key element of their work as Health Champions, suggesting an area for further study.

**Educational Assistant Emotional Labor.** The emotional labor of educational assistants involved in implementing reform appears to be a gap in the academic literature. This study provides some insight into classroom educational assistant emotional labor during reform that might merit further consideration. The Alberta Teachers' Association (2000/2016) identifies paraprofessionals in educational contexts as include a variety of support staff including library technicians, speech and language therapists, and classroom educational assistants. For this study, the focus is on classroom educational assistants (EAs). The educational requirements for classroom EAs is not regulated by the province of Alberta; however, in general, to be hired, an EA should have a high school diploma and one year of post-secondary training (ALIS, 2017).

Often tasked with working with the most difficult students for extended periods of time over the day and year, educational assistants are required to maintain calm in the face of daily classroom challenges (Sandmark, 2003). Their work is determined by their classroom teacher, and they have expressed having a very limited amount of control over their daily routine (Brown & Stanton-Chapman, 2017) resulting in a power differential in which the teacher maintains authority over her assistant who is dependent on the teacher to communicate effectively and

assign meaningful and appropriate daily tasks (Workman, 2007). This power differential is supported and encouraged by the Alberta Teachers' Association (2000/2016) whose position is that "in summary, because the current legislation contains little to govern the interaction between teachers and educational assistants, the onus is on teachers to make the relationship as effective as possible" (p. 13). Although well-intentioned and designed to preserve the professionalism and credentials required to be a teacher in Alberta, this guiding document reinforces the mechanistic bureaucratic view of the system and places EAs firmly at the bottom of the educational hierarchy.

In terms of providing leadership or acting as change agents within school systems, little attention has been paid to the role that EAs could play, despite their ubiquitous presence in classrooms. Because this study is small and limited in nature, wider assumptions about the role that emotional labor plays in their ability to be change agents cannot be made. However, a small light is shone on the leadership that EAs could provide by the two participants in this study meriting further research.

### **Why Alberta? The Alberta Context from 2008-2016**

The province of Alberta in Canada was highlighted as a consistently good performer on international exams. It garnered international interest during its cycles of AISI – the Alberta Initiative for School Improvement (Hargreaves & Shirley, 2012). This partnership between the provincial government, the Alberta Teachers Association, and the individual school boards attempted to use evidence-informed data to improve student outcomes. One of the outcomes of this initiative was that the three system leader partners began working on a new direction for schools in the province. This effort culminated in an initiative known as *Inspiring Education* – an ambitious reform project that was introduced to schools through several different policy

documents including *Inspiring Education: A Dialogue with Albertans* (Alberta Education, 2010a), *Task Force for Teaching Excellence* (ASCA Advisory Panel, 2010), and *Inspiring Action on Education* (Alberta Education, 2010b). These policy documents culminated in 2013 with the passing of the Ministerial Order on Education, a piece of legislation that made the reform efforts lawful.

The language of these policy documents spoke of a concerted effort to transform Albertan students into 21<sup>st</sup> Century learners and was built on the premise that educated students were better citizens and were essential to a well-developed and diversified economy (Alberta Education, 2010b). The *Inspiring Action on Education* document (2010b) iterated a need for an urgent change to ensure long term economic prosperity, drawing an explicit tie between educational success and economic growth. It outlined the specific competencies required for employment in the 21<sup>st</sup> Century, including:

critical thinking and problem solving; social responsibility and cultural, global, and environmental awareness; communication; digital literacy; lifelong learning, self-direction and personal management; and collaboration and leadership. (Alberta Education, 2010b, p. 9)

Further, it detailed other requirements such as a commitment for inclusive education, personalized learning, student-centered decision-making, accountability measures to ensure high standards for student outcomes were met, and the use of evidence-based knowledge use by practitioners.

Aside from introducing the Wellness Framework in 2009, the *Inspiring Education* movement did not concern itself with promoting student health and wellbeing, so implementing Comprehensive School Health became the voluntary work of Health Champions described

further in Chapter Four. Although further curricula change was introduced, the specifics have not yet been determined. Creating a new experience of educational turbulence, these curricular changes are currently being designed by a newly elected government having a different ideological background than the government behind the *Inspiring Education* reform efforts. As of June, 2018, the Alberta government has yet to release the newest iterations of several Programs of Study, although these documents are being developed in earnest to be presented before the next election.

Because teaching excellence was highlighted as a central force for sustaining change (Alberta Education, 2010b; McKinsey et al., 2007), along with the *Inspiring Education* documents came the *Task Force for Teaching Excellence* (ASCA Advisory Panel, 2010), a value-laden report that assigned the bulk of responsibility for academic success to teaching excellence. It suggested that “teaching excellence begins with an individual’s passion to be the best that they can be” (ASCA Advisory Panel, 2010, p. 185), and that principals should be tasked with ongoing assessment of teachers to ensure that teachers were performing at the highest possible levels. It tied the principal’s role to creating a school climate of excellence and monitoring teachers for growth and alignment to the principles of success. Educational actors became the centre of school reform and became personally accountable for student academic success.

As the *Inspiring Education* policy changes have been enacted in Alberta for several years, educational actors are now beginning to look at the impact (Chaar et al., 2016) of their reforms on student achievement. The purpose of this study was to add to the research literature about the impact of a strong campaign for reform on change agents’ emotional labor. With the educational reforms of *Inspiring Education* aimed directly at creating excellence in student

outcomes by assessing teaching practice through changing the school climate, the possibility exists that, in Alberta, the changes have intensified the emotional labor of educational actors and change agents.

A plausible, storied account of the daily, lived emotional experience of female change agents is the main finding of this study and is written in Chapter Five. The participants in this study, having held multiple roles including pre-service teacher, educational assistant, teacher, school leader (assistant principal) and system leader from Alberta provided data about their emotional labor while advocating for the implementation of Comprehensive School Health framework in schools. This reform was generated with the adoption of the Wellness Framework (2009), a reform related to *Inspiring Education*. By creating a fusion of horizons (Gadamer, 1975) between the lived experiences of these change agents, the question of “What is the lived experience of change agents with the phenomenon of emotional labor during educational reform?” is addressed.

### **Summary**

Chapter Two aimed to establish the historical and constructed context of this study to situate the lived experience of the five female participants in a wider system. Similar to a painted mural, the conceptual framework of complex adaptive systems engaged in the cusp of change provided the background canvas for the policy and curricular changes in Alberta from 2009-2016. By drawing attention to the systemic traditions associated with the grammar of schooling, educational turbulence, and the social construction of schools and then tying these traditions to the emotional labor of individuals working inside these schools in a variety of roles, I illuminated the phenomenon of emotional labor as a social construct influencing the work of individuals in the Alberta educational system.

The intent of Chapters Four and Five is to focus the research study more closely on one aspect of this mural – the lived experience of Health Champions engaged in the implementation of the Comprehensive School Health framework. I chose hermeneutic phenomenology to provide a phenomenological example of change agents' daily lived experience to illuminate the influence of systemic reform on individuals and individual emotional labor on systemic reform.

### Chapter 3: Methodology

This hermeneutic phenomenological study explored the lived experience of five female Albertan educational actors implementing educational reform. Specifically, I sought insight into the meaning of the experiences of female change agents (Health Champions) who have held multiple roles including pre-service student teacher, educational assistant, teacher, school leader, and system leader engaged in the impact stage of implementing a significant reform resulting from the *Inspiring Education* policy initiatives of 2009-2016. I wonder what gendered educational actors' lived experiences can illuminate about the phenomena of emotional labor. Emotional labor is the internal work of person as she distances her actual emotions from the appropriate expression of these emotions in a work environment (Hochschild, 2003). The greater the distance between true emotion and appropriate emotional expression, the greater the emotional labor.

The major phenomenological question explored was: What is the lived experience of female Albertan change agents (Health Champion) who have held multiple roles such as pre-service student teacher, educational assistant, teacher, school leader, and system leader engaged in implementing a reform initiative related to Comprehensive School Health between 2009-2016, a period that might be described as the cusp of change (Kowch, 2016)? As a secondary research question, I also asked: Will educational actors describe an intensification of emotional labor (Hochschild, 2003) during the implementation of educational reform?

The methodology of this study followed the hermeneutic phenomenology stemming from four important works written by G.W.F. Hegel (1977), Martin Heidegger (1953), Hans-Georg Gadamer (1975), and Max van Manen (2014).

### **Research Epistemology and Methodology**

Because the nature of the research question was geared towards human sciences and seeks to find the essence of a lived experience expressed through dialogue, the study was qualitative in nature. Qualitative research seeks to explore and understand human experiences through constructivist meaning-making (Creswell, 2015; Crotty, 1998). The research question was aimed at studying the meaning of lived experiences of people and intended to illuminate their collective experience of emotional labor through language; thus, methodologically, my study is considered hermeneutic phenomenology. Crotty (1998) described hermeneutic phenomenology as the study of the lived experiences of humans as they relate to a phenomenon, in this case, the experience of emotional labor in educational actors implementing reform. This methodology provided a framework best suited to generate a plausible account of a common lived experience.

Hermeneutic phenomenology has a long history as a methodology and is grounded in philosophy (Dowling, 2005). To use this methodology, I was required to understand the contributions of philosophers and to ensure that the research study followed the traditions associated with the methodology's ontological and ontic origins (Laverty, 2003). I maintained the openness and wonder of this methodological approach so that my own assumptions and subjectivity about emotional labor and educational reform did not cloud the emergence of the essence of the lived experience of the research participants. My analysis of the data is grounded in my own horizon of meaning; therefore, I provided an extended narrative explicating my assumptions and biases in Chapter Five consistent with this methodology.

I am an insider to the world of education, as I have been a teacher in Alberta for fifteen years in a variety of contexts. My current role as a teacher-researcher was both a hindrance and a



help as I moved through my research study. I have experienced the intensification of my own emotional labor while engaged in educational reform during the implementation of policies stemming from *Inspiring Education* and Comprehensive School Health. My understanding of this phenomenon, that was carefully tracked in my research journal, both informed and challenged me as I discovered the essence of this phenomenon as experienced by other female educational professionals.

My study aimed to uncover and describe the emotional experience of human beings engaged in complex and messy work. I took an interpretivist stance to analyzing the data; therefore, I followed the Heideggerian form of hermeneutic phenomenology (van Manen, 2014). My research findings and discussion describe a plausible account of the everyday experience of emotional labor by female educational actors as they reflected on the state of flux created by significant reforms in Chapter Five. The written account aims to add to the knowledge base associated with emotional labor and begins a discussion of the role of human emotional labor in complex adaptive systems. My purpose for focusing specifically on female participants will be described in detail under the Research Sample section of this chapter.

### **G. W. F Hegel and the *Phenomenology of the Spirit***

Georg Wilhelm Friedrich Hegel was a German philosopher who died in 1831 (Lavery, 2003). His first edition of *Phenomenology of the Spirit* was published in 1807 and was an important philosophic exploration of the human spirit. This work re-defined the human spirit (named Spirit) as the ‘subject’ of all experience, and he suggested that no scientific study could ever remove Spirit from the understanding (or ‘predicate’) of experience. Hegel (1977) suggested that “Spirit, being the substance and the universal, self-identical, and abiding essence, is the unmoved solid ground and starting-point for the action of all, and it is their purpose and

goal, in in-itself of every self-consciousness expressed in thought” (p. 264). This explanation of the spirit suggested that ontic stance, or understanding of the real world, is generated from and by our spirit. His work inspired numerous subsequent philosophers to follow the Hegelian understanding of Spirit, and later writers, such as Heidegger (1953) and Gadamer (1975) continued to draw on his work in their own conception of the human spirit.

The study of the emotional labor of female educational actors necessitated an ontological stance on the nature of the spirit of the human being. Hegel’s work provided the basic understanding that the spirit is inherently and inextricably linked to the individual person and his experience with the world. Hegel’s (1977) assertion that the loss of a clear connection between the subject *I* and the predicate of experience aligns with the idea that emotional labor results when the work (or the predicate) does not match the self (the subject). The act of re-establishing the subject and the predicate, or the work with the emotional self, is the basis of the concept of emotional labor. Distancing or uniting the subject (the participants) from the predicate (the emotional expression related to their own work) can result in intensified or reduced emotional labor, hence Hegel’s ontological view suited my study of the phenomenon of emotional labor in change agents.

I accepted that interpretation will be a necessary element of describing this phenomenon and analyzing my data, so my study aligns with Heideggerian Phenomenology, a derivative of Hegelian phenomenology.

### **Martin Heidegger and *Being and Time***

Martin Heidegger was a student of Edmund Husserl, another prominent philosopher in the phenomenological tradition (Findlay, 2012; Lavery, 2003). Husserl believed in the

subjectivity of the researcher in phenomenology, but he suggested that a person could identify his own assumptions and then study a phenomenon from a distance, an idea known as bracketing. Heidegger initially prescribed to the Husserlian form of phenomenology that aimed to dislocate, or bracket, the researcher outside of the understanding of the ‘thing’ itself (Moules, 2002). However, after taking over as the head of the department of philosophy from Husserl, Heidegger split from his mentor and developed his own understanding of the nature of human beings (that he named *dasein*) and subjectivity that he first described in his book, *Being and Time* (1953).

In *Being and Time*, Heidegger (1953) asserted that subjectivity was the natural state of the *dasein* who could only have a worldview informed by himself<sup>1</sup>, and he could not separate his worldview from his understanding of a phenomenon. The ontic – or real world experiences of *dasein* – formed the basis for the ontological understanding produced by the *dasein*. The real-world experience and resulting understanding by *dasein* could not be removed from the study of a phenomenon because of the nature of *dasein*:

*Dasein* is a being which I myself am, is being in each case mine. This determination indicates an *ontological* constitution, but no more than that. At the same time, it contains an *ontic* indication, albeit it an undifferentiated one, that an I is always this being, and not others. The who is answered in terms of the I itself, the “subject,” the “self.” The who is what maintains itself as an identity through changes in behavior and experiences, and in this way relates itself to the multiplicity. (p. 112)

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<sup>1</sup> Note: Hegel and Heidegger always refer to Spirit or *dasein* as “he,” so to follow the philosophical tradition and for clarity in written expression, I also use the masculine pronouns. When referring to the study participants or myself, I will use the feminine pronouns.

The dasein was, in line with Hegel's (1977) conception of Spirit, the subject of all experience with a phenomenon. Changes to its self-understanding occurred when dasein interacted with others – the *they*. The *they*, according to Heidegger (1953), is the others encountered in the world as the dasein takes care of its everyday existence. This relationship is determined by proximity (in both space and time) – the nearer at hand of the *they* to dasein, the more interested dasein is in the *they*. Being near at hand, to Heidegger, suggested a commonness within the relationship; that is, the others were a part of the unremarkable, ontic experience of the dasein.

The averageness and taken-for-grantedness of this relationship in the public realm could blur and obscure the true nature of the dasein from himself. In other words, Heidegger suggested that the true nature of the dasein was both impacted by and from his interaction with other people. The frequency of the interactions between the dasein and the *they* increased the unconscious impact of this relation on the dasein. The role of the discourse in phenomenology was to lift the curtain created by the public *they* (the they-self) so that dasein can *see* the structures around himself in a clearer manner.

The role of the dasein, and ultimately, the researcher, is not to disappear again behind the curtain of the they-self, but to be open and transparent by presenting his authentic self to others. The researcher-I becomes the centering aspect of the phenomenology from which understanding begins, expands, and returns as a circle. This horizon of understanding, that begins from the dasein and stretches only as far as he can see in both time and space, is a fundamental concept of Heideggerian phenomenology – that “the unity of the horizontal schemata of future, having-been, and present is grounded in the ecstatic unity of temporality. The horizon of the whole of temporality determines *that upon which* the being factically existing is essentially *disclosed*”

(Heidegger, 1953, p. 348). This horizon of understanding – from the individual to the whole of the phenomenon back to the individual – forms the hermeneutic circle.

Heidegger's concept of spatiality and temporality was taken on by his own student, Hans-Georg Gadamer, who furthered these ideas by adding in the essential characteristic of language, text, and dialogue – hermeneutics – to his mentor's phenomenology.

### **Hans-Georg Gadamer and *Truth and Method***

A student of Heidegger, Hans-Georg Gadamer added hermeneutics to phenomenology expanding the methodology to include language and communication (Lavery, 2003; Sloan & Bowe, 2013). He argued in *Truth and Method*, first published in English in 1975, that language was the primary source of interaction between the self and the other, and that dialogue and written text, through a commonly understood language, were the basic source of all human communication.

Like his mentor, Gadamer (1975) embraced researcher subjectivity and suggested that rather than trying to hide or discount the prejudices and traditions of the self:

To do justice to a man's finite, historical mode of being, it is necessary to fundamentally rehabilitate the concept of prejudice and acknowledge that there are legitimate prejudices. Thus, we can formulate the fundamental epistemological question for a truly historical hermeneutics as follows: what is the ground of the legitimacy of prejudices? What distinguishes legitimate prejudices from the countless other which it is the undeniable task of critical reason to overcome? (p. 289)

Gadamer (1975) suggested that researcher prejudices could be constructive by acknowledging that the researcher had expertise about the phenomenon giving him<sup>2</sup> the competence to study it. By explicating researcher assumptions and prejudices, others could look closely at them for evidence of authority or overhastiness (p. 292) in the findings. Authority could be spotted when the researcher-self released his own reason and followed the authority of others. This authority could be either negative or positive, depending on the source. In the case of my research inquiry, my authority to study the phenomenon of emotional labor was generated by completing my critical literature review – providing evidence of deep thought into emotional labor, leadership theories, and educational reform - that established the state of my current knowledge.

Gadamer (1975) asserted that the researcher-self should have a deep knowledge of a topic, but not allow his own knowledge to supersede the knowledge brought to the topic by the participants. Overhastiness is the opposite of the authority because it places the researcher's own knowledge and reason above that of all others, downplaying the crucial knowledge presented by the study participants. Too much overhastiness results in a pre-occupation with fore-meanings (the researcher's own beliefs, knowledge and attitudes) that can result in an ignoring or rejection of important data expressed by the participants, a potential pitfall that would endanger the credibility of the study. For my study, I used my researcher reflexive journal to provide evidence of my own potential for overhastiness as they related to my data analysis. I also included a

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<sup>2</sup> As noted earlier about Hegel and Heidegger, Gadamer (1975) also only uses the masculine pronouns to refer to subjects and objects, so I continue to follow this tradition mainly to maintain clarity in writing.

detailed anecdote related to my own work as a Health Champion to reveal my prejudices in Chapter Five.

Gadamer (1975) suggested that to remedy the problems of authority and overhastiness, the researcher-self should work with others to develop a fusion of horizons (Moules, 2002). Realizing a new and deeper understanding of the phenomenon by integrating the knowledge and experiences of the researcher with the participants is described as, “the fusion of horizons of understanding, which is what mediates between the text and the interpreter” (Gadamer, 1975, p. 385).

The goal of hermeneutic phenomenology then becomes not to merely look for patterns of sameness between what is said by the self and others, but to create a new understanding for both the self and the other involved in the conversation through reflexive dialogue and study of the associated text that results from the dialogue (Gadamer, 1975). Developing a fusion of horizons between me and my participants required an emphasis on open and honest dialogue to come to a new, yet recognizable and plausible, understanding of emotional labor during educational reform by educational actors in diverse work roles.

Coming to this shared understanding of emotional labor in my study involved deep and lengthy discourse about the nature of the everyday experience with emotional labor. It also necessitated a discussion of the grammar of schooling, as explained in Chapter Two, to ensure that myself and my participants could see past the walls of our own Plato’s Caves. Following the Hegel-Heidegger-Gadamer line of hermeneutic phenomenology, Max van Manen (2014) suggested some guidelines for using this methodology in professional practice.

### **Max van Manen and *Phenomenology of Practice***

Grounded in the line of Hegel, Heidegger, and Gadamer, Canadian scholar Max van Manen (2014) conceptualized a framework for “doing phenomenology” (p. 18). His methodology for hermeneutic phenomenology operationalized the inquiry while staying true to its philosophical roots. One of his main assertions was the necessity of creating a reduction of the phenomenon. The aim of reduction was to provide a rich description of the lived experience of the phenomenon as it shows itself, not how it has been pre-conceived (van Manen, 2014). Generally, the reduction is produced through writing and should evoke emotive and physical responses that resonate with the reader as a plausible account of the phenomenon.

In the context of this study, the reduction developed in Chapter Five describes emotional labor as it emerged from the data provided by my participants and is supported by my own experience and critical literature review. I uncovered the essence of educational actors’ meanings of emotional labor by “practicing a thoughtful attentiveness” (van Manen, 2014, p. 221) to their words and expression, and maintaining the phenomenological attitude of openness as I listened to the lived experiences of my participants. By remaining open to others and listening carefully to their words, I worked to develop a fusion of horizons about emotional labor of educational actors during educational change. van Manen’s (2014) suggestions for methodology form the basis for the following research study design.

### **Research Design and Methods**

#### **Methods**

Drawing on van Manen’s (2014) description of Heideggerian/Gadamerian hermeneutic phenomenology, the primary source of data emerged through dialogue. The main methods for data collection centered on the interview and the researcher reflexive journal.



**Interviews.** Although open-ended interviews are the recommended form of dialogue for the hermeneutic interview (van Manen, 2014), as a beginner researcher, I followed a semi-structured format. Geanellos (1999) expressed the difficulties that an unskilled or beginning researcher can have with open-ended interviews, that can result in poor data or awkward interviews. With this in mind, I used Creswell's (2015) interview suggestions and obtained consent from the participants, identified a relaxed interview location (which was not at the participants' school setting), took clear and detailed notes, and conducted the interview in a professional manner from beginning to end. van Manen (2014) also suggested that, in addition to the above considerations, the researcher-interviewer should be personable, open, and trustworthy; the participants be open to a deep discussion of the phenomenon; enough time be provided for a meaningful conversation; the conversation be deliberately focused on the participant's experience with the phenomenon; and that the questions be formulated to generate rich descriptions of experience (p. 314).

I interviewed five female Health Champions and followed my interview script to a certain extent. The pre-determined list of questions acted as a guide; however, I asked several open-ended questions to further probe my participants' understanding of the phenomenon. The interviews lasted between 40-60 minutes in length and were held in private locations between February 2 and February 17, 2018.

After agreeing to participate in the interview, the participants were provided with a paper copy of the Teaching Effectiveness Framework (TEF) (Friesen, 2009) and the Wellness Framework (2009) along with the Consent to Participate letter (Appendix A) at the interview. The TEF document, used in some Alberta schools as a rubric for Comprehensive School Health, was intended to be a tool for pre-reflection to encourage the participants to reflect on the ignition

for implementing Comprehensive School Health in their schools. The purpose of reflecting on this document was to begin the discussion around the participant's understanding of "good" teaching. This policy document is a rubric that defines good pedagogy in the context of the *Inspiring Education* reforms. As discussed in Chapter Two, educational actors often use their own understanding of 'good' teaching and leadership as their centering pedagogical spirit in times of flux, and the discussion of their perceptions of "good" teaching and leadership could illuminate the experience of emotional labor. In the case of all five participants, they had used the TEF as a part of their work, but the document provided very little in the way of the intended discussion about what constituted "good" teaching.

My interview protocol and questions are listed in Appendix B. They were generated from suggestions by Michrira and Richards (1996) and Creswell (2015). I was mindful of prompts that I used to help participants elaborate or clarify their responses during the interview. After I interviewed the participants, I kept careful and extensive notes in my researcher reflexive journal noting connections between the participants' experiences and important physical gestures made by the participants during the interviews in response to questions and jotted down potential data codes that emerged from the interviews. The process of coding data began during the interviews as I reflected on the whole dialogue between myself and my participant.

**Researcher Reflexive Journal.** van Manen (2014) and Miles, Huberman, and Saldana (1994, 2014) identified a crucial aspect of the research design as the integrity and comprehensiveness of the researcher reflexive journal. My journal contained detailed reflections during the data collection, analysis, and description of findings with the intent of ensuring the credibility of my study (Bloomberg & Volpe, 2012; Miles, Huberman & Saldana, 1994, 2014). My researcher reflexive journal, that I had on my person as I conducted this study, consisted of a

three-ring binder (containing non-identifiable participant information), password protected files on my laptop (containing recorded interviews and transcripts), and a coil note scribbler (for research memos and jottings) (Bloomberg & Volpe, 2012). My journal should continue to provide a critical source of transparency of my study, and should act as a decision trail (Laverty, 2002). The digital files of my data on my laptop will be moved to an encrypted thumb drive once the study has concluded, and the thumb drive, binder, and coil scribbler comprising my researcher reflexive journal will be kept in a locked filing cabinet in my home office.

### **Research Setting and Context**

The context, or school setting, of the participants should be a recognizable socio-cultural world to the participants so that it reflects their context as being related to the phenomenon (Findley, 2012). Four of the five participants were approached because of their connection to a Comprehensive School Health conference dedicated to providing professional development for Health Champions. The pre-service student teacher had also attended this conference but was found through her association with an online Comprehensive School Health course. The conference was held in Alberta, Canada, and conference delegates came from a variety of areas of the province and across Canada. This provincial conference acted as a crucial gathering point for Health Champions seeking to improve the health outcomes of students at their home schools. When speaking to potential participants, I selected Albertan change agents who were in the impact stage of implementing an initiative or project related to Comprehensive School Health, an educational reform stemming from the 2009-2016 *Inspiring Education* initiative.

### **Research Sample**

I sought perspectives from female change agents (Health Champions) acting in multiple roles such as pre-service student teacher, educational assistant, teacher, school leader, and system

leader. The diversity of roles within the system were meant to provide a rich description of the phenomenon of emotional labor, and the rationales for selecting these roles was outlined in the critical literature review. My justification for using a gendered focus is detailed further below. In hermeneutic phenomenology, a common practice is to use purposeful sampling to ensure that the participants have experience with the phenomenon (Moules, 2002). In the case of this study, I used maximal variation sampling (Creswell, 2015, p. 205) to provide as diverse a set of lived experiences as possible, but ultimately found the five participants through their connection to a provincial conference centered on Comprehensive School Health.

Once I received approval from the Ethics Board on November 27, 2017, I posted a general research recruitment post to a Facebook group for Alberta teachers. Previously, I used Facebook as a tool for recruiting participants for my Master's degree final research project and found this platform very useful. I used the Facebook post to recruit participants (see Appendix C), and from this post, I immediately had twelve responses. Unfortunately, none of the respondents fit the delimitations of this study, although the nature of the responses suggested to me that the phenomenon of emotional labor was recognizable to educational actors. To find Health Champions, I also posted the same recruitment post to the Health and Physical Educators Facebook page (HPEC). This post also generated several responses and the suggestion that I attend the Shaping the Future conference to find potential participants. I reached out to the conference organizers and was allowed to present a research poster during the conference to recruit potential participants (Appendix D). This effort was successful as I was able to secure four of my participants through their connection to this conference.

In terms of recruiting the pre-service student teacher participant, I asked a sessional instructor from the EDUC 551 course at the Werklund School of Education to post the Facebook

recruitment post to her students. As a result, the pre-service teacher participant contacted me to participate in this study.

Gadamer (1975) suggested that for the fusion of horizons to occur, the participants need to have a long and wide sense of temporality:

A person who has no horizon does not see far enough and hence over-values what is nearest to him. On the other hand, 'to have a horizon' means not being limited to what is nearby but being able to see beyond it. A person who has a horizon knows the relative significance of everything within this horizon, whether it is near or far, great or small. (p. 313)

As such, the participants that I selected were self-identified Health Champions who were actively involved in implementing Comprehensive School Health initiatives in the time span of 2009-2016 giving them a clear sense of their emotional journey through time and space. The participants identified themselves as change agents within their educational contexts.

As a researcher-teacher, I had an insider-outsider status with my participants. In my researcher position, I had similar power authority to the teacher, but was lower than school leader and system leader because of our professional designations within the traditional power structure. Because my research question was for the whole province of Alberta and centered on the role of Health Champion, my participants were eager to speak to me about their experiences, so power differentials appeared to have no impact on their willingness to be open with their experiences. Because I held no formal or occupational tie to any of the participants, they viewed me only in my researcher role and were open to share their lived experiences with me.

Because the pre-service student teacher participant was a former educational assistant, she had many years of lived experience in schools. She was about to graduate from her teacher

education program. As a sessional instructor, I held no power or authority over her, and her participation was not tied to her educational progress. She volunteered to participate based on her interest in the topic and experience with implementing Comprehensive School Health in her role as an educational assistant. She had also attended the Shaping the Future conference.

**Participant Gender.** Hochschild (2003) suggested that women experienced emotional labor differently from men because:

we're still in the stage that if you don't hold in your emotions, you're pegged as emotional, unstable, and all those terms that have always been used to describe women... [For example], when a man expresses anger, it is deemed 'rational' or understandable anger, anger that indicates not weakness of character but deeply held conviction. When women express an equivalent degree of anger, it is more likely to be interpreted as a sign of personal instability. It is believed that women are more emotional, and this very belief is used to invalidate their feelings. (p. 173)

This example draws attention to a tradition (Gadamer, 1975) related to the rules of expressing emotions while at work and the varied nature of emotional labor requirements based on gender.

Although focusing only on female participants flies in the face of universality in hermeneutic phenomenology (van Manen, 2014), even Hegel himself differentiated between the roles of the two genders in his discussion of Spirit:

Consequently, the feminine, in the form of the sister, has the highest intuitive awareness of what is ethical. She does not attain to consciousness of it, or to the objective existence of it, because the law of the Family is an implicit, inner essence which is not exposed to the daylight of consciousness, but remains an inner feeling and the divine element that is exempt from the real world... The difference between the ethical life of the woman and

that of the man just in this, that in her vocation as an individual and in her pleasure, her interest is centered on the universal and remains alien to the particularity of desire; whereas in the husband the two sides are separated; and since he possesses as a citizen the self-conscious power of universality, he acquires the right of desire and, at the same time, preserves his freedom in regard to it...He [the brother] passes from the divine law, within whose sphere he lived, over to human law. But the sister becomes, or the wife remains, the head of the household and the guardian of the divine law. In this way, the two sexes overcome their [merely] natural being and appear in their ethical significance, as diverse beings who share between them the two distinctions belonging to the ethical substance. (p. 275)

Hegel (1977) aligned the male with the community and the female with the household and clearly stated this difference as a fundamental concept in his phenomenology. This concept appeared undisputed by either Heidegger or Gadamer, creating a powerful cultural tradition about the role of women in philosophy. Langle de Paz (2016) suggested that “feminist emotion” (p. 187) could be used as a political tool to rebel against the patriarchy, and that critical perspective may arise from my participants, which did to some extent. However, the long adhered to social tradition between the teaching profession and the expectation for female caring and the association between teaching and motherhood also emerged as impacting the participants in this study (Reid & Miller, 2014). Motherhood and family relations did emerge from all five participants as having a strong impact on their work as Health Champions. I made a careful note in my researcher reflexive journal of how this data related to the phenomenon of emotional labor of educational actors during times of educational change, although these traditions were not central to the collective understanding of the phenomenon.

Furthermore, as noted in Chapter Two, female Physical Education Specialists have been portrayed negatively in popular media as bullies and “butch lesbians” (Fisette et al., 2017; McColluck et al., 2010). Part of the intention of the description of the lived experience of Health Champions is to provide a different narrative about the work of these women to challenge those stereotypes.

After the conclusion of this study, an interesting avenue of further study would be to run parallel interviews with male Health Champions to see if this tradition did impact the emotional labor of gendered educational actors, or if I am merely assuming, based on pre-conceptions, that emotional labor is different for men and women change agents in educational settings. Given the gendered stereotypes of male educational actors in the Physical Education and Health fields, this additional study could provide a different and plausible account of their lived experience with emotional labor. While pre-interviewing potential participants at the conference, several men expressed an interest in the topic and a willingness to be studied.

### **Data Collection Methods**

Data analysis in hermeneutic phenomenology requires deep reflection and repeated interaction between myself and my data (Schuster, 2013). The data generated through dialogue during the conversational interview was audiotaped using a digital recorder (a Sony digital recorder) and a voice recorder app on my iPhone (protected by thumbprint and passcode features) to ensure that the interview was properly recorded. I completed the transcription of the interviews with the aid of an audio-to-text software program (Trint.com). Although the software captured most of each interview accurately, I was required to listen carefully to each audio recording to correct and expand on the text to ensure accuracy. This process enabled me to gain the immersion necessary with each interview to reflect on the experiences described by my



participants. This process enabled me to embrace the whole of the data provided to me by my participants therefore beginning the hermeneutic circle.

As suggested by Creswell (2015), I left wide margins and spaces throughout the transcribed documents to reflect and interpret the data. Self-transcribing helped with operationalizing the hermeneutic circle as I listened to the whole-part-whole (Gadamer, 1975) movement of the data. Gadamer (1975) suggested that the hermeneutic circle is a critical aspect of hermeneutic phenomenology and requires the researcher to understand the essence of the phenomenon as it emerges holistically from the data. The individual experiences with emotional labor expressed by the participants were meant to illuminate the essence of the phenomenon, not a generate a psychological interpretation of each individual's experience. As a result, the reduction in Chapter Five describes a plausible example of emotional labor during educational reform, not a detailed exploration of a singular participant's narrative about her own experience.

Because silence is considered text and being silent (both by *dasein* and the other) is a key part of attunement and understanding while making meaning of experience (Heidegger, 1953), my transcription and interview notes made a note of longer participant silences. I also highlighted the words "like" and "um," the first of which often indicated a dialogue the participant had with others or an inner monologue with herself, and the second which often indicated that the participant was processing a thought. These cues assisted me with my data analysis as described later in this chapter.

### **Data Management**

Because of the primacy of the hermeneutic circle in data analysis, the lived experiences of the participants were kept whole to ensure that the whole-part-whole can be cycled through continuously (van Manen, 2014). To preserve the confidentiality and privacy of the participants

(Miles et al., 2014), the interview data, preserved through transcripts and recordings, was kept on an encrypted, external hard drive (thumb drive) at my home office. Participants chose their own pseudonyms to be associated with any anecdotes (van Manen, 2014) or vignettes (Miles et al., 2014) that appear in Chapters Four and Five.

Given that the participants could be identified by their roles, I did not hold any interviews at school settings to assure privacy. Although most of the participants have professional associations with each other through having attended the same conference, this conference had over 600 delegates, all of whom self-identified as Health Champions, and most of whom came from different parts of Alberta. Additionally, identifiable aspects in the data have been modified or generalized at the request of participants during member checks to ensure that the experiences cannot be linked to the participant herself.

Because the goal of the final report of a hermeneutic phenomenological study is to develop a new description of a lived experience, not a write-up of the *individual participant's* lived experience, the participants were clearly instructed that the final representation, in the form of my dissertation, of the lived experience of emotional labor was to be a collaborative account, not an individual account (van Manen, 2014). Descriptions of lived experiences provided as data by the participants in Chapter Four have been stripped of specific references to people, places, or school districts to maintain privacy as much as possible for the participants.

My researcher reflexive journal was kept either in my personal possession as I collected data or was stored in a locked filing cabinet in my home office to preserve the deeply personal data held inside. As evidence of the credibility of my study, I have secured my researcher reflexive journal, original transcripts, audiotaped files, and data analysis notations in a secure location after the completion of the study for an audit trail (Bloomberg & Volpe, 2012). The

secured documents were labelled by pseudonym to clearly denote the origin of any notes, artifacts, or reflections without identifying the specific participants. The list of participants' names associated with the pseudonyms was kept in a file in my home office that is separate from all other data while the study was active and will be destroyed once the study is complete.

Any other identifying information was first cleaned from the data by the participants themselves. They were instructed at the onset of the interview to describe their lived experiences without using place or other names. Participants were then sent the transcripts for a member checks of the raw data, and then they were sent the draft copy of Chapters Four and Five to see how their data was used. At this time, the participants were given the opportunity to make any further alterations to their experiences to maintain their privacy and make suggestions to improve clarity.

### **Data Analysis**

Hermeneutic phenomenology requires an immersion approach (Bloomberg & Volpe, 2012) to data analysis. My immersion in the data began with the transcription process, allowing me to have repeated interaction with the data as I made careful note of my changed understandings and reflections on the information that emerged. My researcher reflexive journal played a key role as I noted any surprises, unexpected insights, or contradictory data (Miles et al., 1994/2014). Heuristic coding depended on discovering the embedded themes within the accounts of lived experience (Miles et al., 1994/2014). To find the emergent themes required me to use wholistic reading approach (reading of the entire transcript as one), selective reading approach (sentence by sentence) and detailed reading approach (word by word) (van Manen, 2014, p. 320; Vagle, 2014, pp. 98-102) until I felt that I reached data saturation – when the data could tell me no more stories.

A common approach to finding emergent themes in lived experience data is to look for evidence of corporeality (body), spatiality (space and place), temporality (time), and relationality (others) within the participant dialogue (van Manen, 2014). For an emerging phenomenologist, such as myself, differentiating illustrations of experience, while disregarding participant speculation or opinion (Sloan & Bowe, 2013), was a challenge. I pursued peer assistance from the participants in the form of member checks, and colleague assistance (Bloomberg & Volpe, 2012) from my doctoral supervisor as insights emerged from the data. I also used “insight cultivators” (van Manen, 2014, p. 324) from my critical literature review and popular literature to help me with my interpretation. Insight cultivators allowed for more openness or clarity about the phenomenon, but did not act as theory (Gadamer, 1975). My purpose was to uncover the lived experience my participants with emotional labor during educational reform to provide insight into the phenomenon. I was not seeking to determine how all educators will experience emotional labor, although other educators might find that the phenomenological example in Chapter Five rings true (Moule, 2002) to their own experiences.

To analyze each part of the interview data, I inputted each transcript into a Word document table, separated the data into discrete experiences or insights, and left the left-hand column blank for coding purposes. Following Vagle (2014) and van Manen’s (2014) suggestions for data analysis, I followed the whole-part-whole process and sought out emergent insights from the data. Although I had recorded some possible codes in my journal during and after each interview, I initially focused on line-by-line text coding. This act required multiple close readings of each transcript and included reviewing the raw interview recordings to capture participant expression and other verbal nuances. Data analysis took almost a month as I immersed myself in the data and took time to reflect deeply on the emergent ideas.

The process of creating the table acted as a first reading, and then coding each line became the second reading. After coding all five transcripts separately, I collected 117 individual codes, so I returned to each interview for a third reading and began to narrow and chunk together common experiences (Vagle, 2014). I gathered the codes into fourteen major emergent ideas (see Appendix E for complete list of codes). Printing off each transcript on different colored pages, I physically cut out each separate code and laid them on fourteen large white posters labelled with the chunked themes (see Appendix F for pictures). I manually sorted out the 117 related experiences and pasted them as the data naturally fit together within the fourteen themes. As a result of this process, the main themes developed further in Chapter Four became visually obvious and the posters themselves became the outline for writing Chapters Four and Five. As I sorted through and reflected on the description of participants' experiences, I discovered by gluing them together on paper, each of the individual experiences began to tell a narrative of a new collective discourse about change agents' lived experience with emotional labor. This collective discourse is written as two polyvocal conversations in Chapter Four, developed from a process of analysis that Vagle (2014) described as "crafting a text – not merely coding, categorizing, making assertions and reporting" (p. 28).

After reflecting and revisiting the data provided to me by the participants, I created the anecdote in Chapter Five as a phenomenological example using van Manen's (2014) principles as a guide. He suggested that to shed light on a phenomenon, a written example can bring data collected through interviews to life because "using the paradigmatic form of example in writing a phenomenological research text is making the meaning of a phenomenon or event knowable in a way that the conceptual and argumentative dimensions of the text cannot achieve" (p. 257). By remaining oriented to the phenomenon as presented to me by the study participants and

integrating their understanding and experiences with it into an example, the intent was to fuse the particular with the universal (van Manen, 2014) in a way that would be recognizable as personal to the participants but also to relevant other educational actors involved in championing change in school systems. The phenomenological example could also be viewed as a cognitive model as so-called in complex adaptive systems, a “deeply embedded assumption, generalization, or image affecting the way people perceive the world and go into action” (Fidan & Balci, 2017, p. 17).

### **Timeframe**

- *September, 2017* – Completed Ethics application and submitted it to the Ethics Review Board.
- *November, 2017* – Granted Ethics Approval, began search for suitable participants through Facebook
- *February, 2018* – Presented poster at Shaping the Future conference and secured interviews with participants.
- *January – February, 2018* – Completed interviews, began transcription.
- *March, 2018* – Completed transcription, began manual data analysis, wrote draft copies of Chapters Four and Five, submitted to participants for member checks and doctoral supervisor for feedback. Received feedback from all participants on various elements of their data with the exception of Holly, who had stated firmly that she was not interested in further participation beyond the interview.
- *April, 2018* – Completion of dissertation draft, submission to doctoral supervisor and committee
- *June 22, 2018* – Defense

### **Ethical Considerations**

In a study that asked participants to be open and honest about real lived experiences, I was morally bound to treat them in a manner that minimized harm (Bloomberg & Volpe, 2012). I clearly laid out the purpose of this study and the participants' role in it, obtained informed consent (see Appendix A), explained the expected product of the study (a plausible description of a lived experience not a detailed description of individual experience), and reinforced the participants' ability to withdraw from the study up until I completed the transcription of the interview. I also kept in close contact with all my participants after the interviews to assure them that their data would be used respectfully and responsibly.

Before any interviews are held, I read from a common interview script to each participant to ensure that the dignity of each participant was upheld, and that she understood that, although I will benefit by earning my doctorate from her participation in this study, I would otherwise never use her lived experience as a means to an end (Michrira & Richards, 1996).

The main cause of harm still could be professional harm through identification of the participant. I worked strenuously to ensure that my data transcripts and researcher reflexive journal were managed for anonymity, confidentiality, and security, in the manner detailed earlier. Additionally, I made it clear that the final report of my findings would be a plausible account of a common lived experience, not an actual account of a participant's individual experience. Participants have been involved in every stage of data transcription and analysis through email contact to reassure them about how their data will appear in the final dissertation. With the exception of one participant, who clearly stated during the interview and signed on the Consent form that she was not interested in providing a member check, all the participants have completed and approved their data as presented.

**Trustworthiness**

Bloomberg and Volpe (2012) described trustworthiness in qualitative research as being credible, dependable, confirmable, and transferable. In hermeneutic phenomenology, these concepts are equally important although variably defined (Laverty, 2003; Moules, 2002; Schuster, 2012).

**Credibility.** For developing credibility, Moules (2002) suggested that the researcher should look for harmony between the participants' experiences and the researcher's interpretations. She defined harmony as aligning the interpretation referentially and relationally to the initial experience and allowing for contractions and opposites to emerge and be acknowledged. I have promoted credibility by being transparent and thorough with my assumptions and prejudices (Gadamer, 1975) in Chapter Five, been open in my interactions with my participants, and have tracked my own changed understandings as it emerged during my research in my researcher reflexive journal. I was cognizant of asking leading questions and looked for evidence of my own assumptions on the dialogue that occurred during the interview conversation as I completed my data analysis.

Further to that, by having five participants, the collection of data came from multiple, although related, sources allowing me to focus on the phenomenon of emotional labor in times of educational reform. I attempted to engage with a debrief with my doctoral supervisor to ensure that my analysis focused on the lived experience of my participants, however I found that the process of member checking provided me with more insights.

**Dependability and Confirmability.** The dependability of the study rested on my ability to organize, track, manage, and collect good data about my participants' lived experience of emotional labor. I have kept a clear and sound document trail that includes information about my



data-related decisions and choices within my researcher reflexive journal. I conducted an interpretivist hermeneutic phenomenology by following the Hegel/Heidegger/Gadamer/van Manen philosophical approach to ensure that my study is in line with the traditions of this methodology. My clear decision trail (Laverty, 2003) and data management protocols were aligned with the idea that an audit (Bloomberg & Volpe, 2012) could easily trace how I generated my final report. Furthermore, because I performed manual coding of my data, I have a clear and visual record of my coding process consisting of posters with the codes attached to them. This record will also be kept in a secured location until the completion of this study.

**Transferability.** In qualitative research, the aim is not to design studies that can be replicated or transferred in their own form into a different context. The aim, rather, is to show a match between the research findings and the reader or the research context (Bloomberg & Volpe, 2012). In the case of this study, my aim has been to ensure that my final description of the collective lived experience of emotional labor during educational reform would ring true (Moules, 2002) to a reader or to others engaged in the study of emotional labor and system reform. The significance, according to Heidegger (1953), is to find the importance as signified by the everyday Moment<sup>3</sup> within the horizon of the dasein (in this case, myself) of emotional labor, and not attempt to make this lived experience significant beyond the fusion of horizons of myself and my participants. My aim was to richly illustrate the emergence of the Moment (the lived experience of emotional labor) as recognizable (to the reader and my supervisory committee) as one that could be lived (as a plausible experience) in the now-then (past) or the

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<sup>3</sup> The Moment, as defined by Heidegger (1953), is also discussed as the “now-present” or authentic present – the current experiences of the dasein as he understands the factual world in the context of own past and the foreseeable future (p. 325).

now-future (near future) rather than being caught only in the vulgar present (now) (Heidegger, 1953, p. 402).

### **Study Limitations and De-limitations**

The delimitations that I set were: all participants in this study would come from the province of Alberta, Canada; all participants were cis-gender female; each had held multiple occupational roles (pre-service teacher, educational assistant, teacher, school leader, system leader), were self-identified Health Champions (change agents), and had experienced emotional labor while implementing a Comprehensive School Health initiative.

The limitations of the study arise primarily from my chosen methodology which is fluid and philosophically-based. Although the major academics in the field such as Max van Manen, provided some suggestions for academic inquiry, they continue to hesitate to provide the specific guidelines for beginning researchers like myself to follow.

### **Summary**

The purpose of this chapter was to highlight the main philosophical and practical steps that I took in developing and carrying out this research study. My research study involved understanding the initial works several philosophers including Hegel, Heidegger, and Gadamer and following the practical suggestions offered by van Manen to maintain the rigor associated with hermeneutic phenomenology to establish the trustworthiness of the findings detailed in Chapters Four and Five. The data generated by this study provided insight into the everyday reality of Health Champions, crucial educational actors involved in implementing Comprehensive School Health, and The findings and discussion that follows in Chapters Four and Five will provide detail about the movement of Comprehensive School Health from policy to

practice, discuss the vital role of Health Champions in this movement, and provide insight into the role emotional labor has played in their ability to implement change.

## **Chapter Four: Research Findings**

This research study aimed to describe the lived experience with emotional labor of five female change agents involved in implementing a system-wide reform initiative related to the Inspiring Education movement. To effectively address this phenomenon, I chose to focus the study on five female Health Champions, each of whom has held multiple occupational roles while implementing projects related to Comprehensive School Health. By focusing on this specific reform initiative and group of participants, I gained several insights into the phenomenon of emotional labor as it related to these five change agents working to implement system reform. As described in Chapter Two, this chapter shifts the focus of reform from the big picture canvas of the multiple reforms enacted in Alberta to a focal point of implementing CSH only. To zoom from the whole canvas of reform to a single feature, this chapter will: briefly summarize the origin of the Comprehensive School Health framework; situate Health Champions as crucial change agents required to implement health initiatives; describe the emergence of managed emotions as teachable moments in educational settings; and explore the two levels of emotional labor experienced by Health Champions.

### **What is Comprehensive School Health?**

Comprehensive School Health is an internationally recognized framework used to promote health in school settings. It was created in response to the development of the Ottawa Charter for Health Promotion (1986), a conference report written by the members of the World Health Organization in Ottawa, Ontario. The charter was a call to action to increase collaborative health promotion between the health and education fields. The signatories asked member countries to develop public policy to promote health, to create supportive environments, and to strengthen community action so that all human beings could live up to their potential by living a

healthy lifestyle. The Charter also called for equal control over health services for both males and females. The Ottawa Charter was based on a holistic understanding that health promotion was a shared activity between individuals, organizations, and governments, requiring taking an ecological approach to implementing change (McIssac, Hernandez, Kirk & Curran, 2016). From its inception, health promotion as defined in the Charter has relied on complex adaptive systems theory to be implemented worldwide.

The follow-up technical report from the World Health Organization in 1997 entitled *Promoting Health Through Schools* suggested several recommendations to increase the positive outcomes for student health (WHO, 1997). The expert panel suggested that “the connection between a child’s health and education is a powerful one” and that “the school itself – through its culture, organization, and management; the quality of its physical and social environment; its curricula and teaching and learning methods; and the manner in which students’ progress is assessed – has a direct effect on self-esteem, educational achievement, and therefore the health of its students and staff” (WHO, 1997, p. 2). These four phrases would become the four pillars of the Comprehensive School Health framework, an approach to health education that could help realize the goals of the World Health Organization and its member countries. As one of the founding countries, Canadian health authorities from each of the provinces became early adopters of Comprehensive School Health (CSH).

### **A Brief History of Health Promotion in Alberta**

As a founding signatory of the Ottawa Charter, Canadian health agencies have been involved with promoting the Charter’s ideals through the Comprehensive School Health framework first outlined by the WHO in 1997. When provincial leaders recognized the need to collaborate to achieve the goal of health for all Canadians, the Joint Consortium for School

Health, a cross-Canada partnership of health experts, was formed in 2005 (Propel, 2005).

Although Alberta was not in the initial group that created the consortium, it joined in 2010 (Alberta Government, 2010). The need for further resource sharing became more apparent to policy-makers and health practitioners after the development of the Framework for K-12 Wellness Education (2009), a curricular update to the Physical Education and Health curriculum that specifically referenced using the Comprehensive School Health framework in schools.

Concurrently in 2010, although somewhat independently of Alberta Education, Alberta Health Services completed an extensive survey of health promotion initiatives and released its summary document, *AHS Framework for the Comprehensive School Health Approach* (2012). This document intended to connect the diverse and unrelated health promotion projects being enacted around the province. From 2009 onwards, Alberta Health, Alberta Education, post-secondary institutions, and other provincial organizations such as EverActive Schools, APPLE schools, and the Wellness Fund slowly began to collaborate to develop school health policies related to CSH. This work cumulated in *Alberta's Strategic Approach to Wellness* (Alberta Government, 2014) a document whose vision echoes the World Health Organization's call for "Health for All" (WHO, 1997, p. 3 referencing *Report of the Conference on Primary Health Care*, 1978). Alberta's 28-year development of a health promoting approach to improving student and staff wellbeing in schools seems to have reached an acceleration point with this newest government document. Driving the implementation of Comprehensive School Health within Alberta has been the tireless work of change agents, known as Health Champions, who voluntarily have taken up the call to battle for health in schools.

**Comprehensive School Health and Health Champions**

Having an on-site program champion or change agent has been long understood as a necessary component in reforming organizations (Berman & McLaughlin, 1978), and implementing this massive health reform initiative was no different. Policy documents starting from the *Ottawa Charter* (WHO, 1986) to *Promoting Health Through Schools* (WHO, 1997) to the *Health Promotion Glossary* (Nutbeam, 1998) to the *Alberta Health and Wellness Annual Report* (2009), *Framework for the Comprehensive School Health Approach* (AHS, 2012) and the Alberta Government's Communication Strategy: "Be a Health Champion!" (Alberta Government, 2012) have underscored the importance of having committed individuals in the field advocating for and implementing Comprehensive School Health projects and policies.

These advocates would develop schools into environments that were conducive to improving health through positive lifestyle choices. School-based individuals and organizations would be required to act as change agents to ensure that the great view of "Health for All" would be realized (WHO, 1997). A core element of improving global health outcomes was inviting schools into the job of health promotion. The school's mandate to educate the next generation about the importance of personal health and wellbeing assumed that educators cared deeply about improving student health (Dukowski, 2008). Identifying individuals who championed health and wellness would ensure that health priorities were implemented at the local level (Propel Centre, 2012).

In Alberta, the government pursued a targeted communications campaign entitled "Be a Health Champion" in 2012, and passionate people in the Physical Education and Health fields took on the challenge despite the work being voluntary. Early adopters of the Comprehensive School Health approach were crucial change agents who embodied the Buttercup Effect (Lewis

& Regine, as cited in Morrison, 2002) or a fractal network structure (Morrison, 2002). The idea of the Buttercup Effect is that individual flowers emerge from the same root system of the parent plant. Metaphorically, the roots were the Ottawa Charter and subsequent policies, and the individual flowers are the change agents producing health promotion projects in a multitude of locations. Although the participants in this study were drawn from a variety of locations around Alberta, their root system – a commitment to Comprehensive School Health – loosely connected them as a team working on a shared vision, as Morrison (2002) suggested “teamwork is less about units within the schools doing the same thing; it is more about them moving in the same direction” (p. 38). Although the five participants were not employed by the same district or working in the same school, they were all moving the same direction with a common goal generated from the CSH policy documents. Studying change agents’ lived experiences while implementing Comprehensive School Health begin a discussion on the phenomenon of emotional labor during times of flux.

### **The Fusion of Horizons of Five Health Champions**

**Participant Profiles.** For this study, I interviewed five female Health Champions who have been active in implementing Comprehensive School Health (CSH) initiatives in Alberta from 2008 until the present. The participants were self-identified as Health Champions, and four were approached during a major Comprehensive School Health conference (Shaping the Future) in Lake Louise in February, 2018. The pre-service teacher participant was recruited through a posting to an online Comprehensive School Health course offered at a major university. All five participants have held multiple occupational roles within the province and were drawn from southern, central, and northern communities in Alberta. To respect their privacy, all five



participants have chosen pseudonyms to associate with their data, and their location will only be referred to collectively because naming their location could make them identifiable.

The first participant, Holly, has held several roles in the Alberta educational system, including educational assistant, trustee, and post-secondary student. Maui, the second participant, has been a teacher, provincial leader, system consultant, and assistant principal. Phoebe has been an educational assistant and pre-service teacher, and Irene has been a provincial leader, system consultant, and teacher. The fifth participant, Sunita, has acted mainly outside of schools as an external system leader and school health partner. All five of the participants have eight or more years of developing or implementing health promotion initiatives in or for Alberta schools.

In terms of their self-identification as Health Champions, all five indicated that health promotion was an area of passion before taking on the title of Health Champion. Although Sunita's paid role included some health promotion, all of the participants indicated that their CSH work was characterized as side projects that they have implemented voluntarily outside of their formal employment role. Holly began to work with her Health Team because she was invited to join the Wellness Team as a part of her role as trustee, but that she was interested in health promotion prior to receiving this invitation. Phoebe, Maui, and Irene indicated that they became involved in CSH organically – they were implementing its philosophy of promoting wellness for all students long before understanding that CSH was an actual framework. Just as the initial policy changes came about in response to concerns about nutrition and childhood obesity (AHS, 2012; WHO, 1997), all five participants indicated that their early work was primarily centred around assisting students with making healthier food choices.

**Becoming a Health Champion: Framework and Student Connections.** When discussing how she came to be a Health Champion, Irene encapsulated how the CSH theoretical framework became a support for work she was already doing:

I taught there for a little bit... Teaching Phys. Ed, but nobody was teaching the Health curriculum particularly rigorously, I'd say. So, I saw a gap in my school for that, and so I just opted to take that on. So that's really where I started implementing Comprehensive School Health, before I knew even what it actually was.

By being early adopters of CSH, all five participants indicated very clearly that they were already dedicated to improving student wellbeing and that being a Health Champion reinforced their positive relationships with children and youth. Unlike the media portrayals of indifferent and mean PE teachers (McCulloch et al., 2010; Walton-Fisette et al., 2017), they suggested that their main concern was improving the wellbeing of students, a sentiment echoed by Holly and Sunita whose official work did not involve direct contact with students.

The common discourse was that, as expressed by Phoebe,

I always am fostering our [the student and teacher] relationship. That how I started out as an educational assistant, and that's how I will be as a teacher. It's because of those relationships with the kids that I started a run club in my role as Health Lead. But it was only supposed to be for Grades 4-6, but my Grades 2s would be like, "Mrs. Phoebe, can't we come? Can't we be a part?" And I'd be like, "Sure, of course." So, I feel like that's where I got to build relationships with kids.

If the implementation of the CSH initiatives resulted in improvements to their relationships with students or immediate stakeholders, the participants indicated a desire to continue working as Health Champions, indicating the importance of relations to change agents. Maui suggested that:

So, you have these expectations [from system level managers], but at the same time, I'm a firm believer that it's about creating that space of safety, and creating that space of relationships, because once you do that, those things [school vision and academic achievement] will come. They'll come... As an administration team, our job is to help our team be able to go, "I'm going to make connections with these kids because I will still get through that curriculum because I won't have to stop and deal with all the discipline when I have to stop [instruction] to deal with constant classroom management.

Holly described the connection between teacher and student also as a key aspect of maintaining classroom relationships because:

A good teacher, to me, is going to connect to their student. They're going to know their student and then the child is going to open up and be more willing to learn rather than someone just reiterating facts and whatnot. But someone who can make that connection... If you make that connection, I think you're going to get a lot further with your students. So, to me, it's all about the personal connection.

Irene explained the teacher's perspective on creating and losing those connections with students as a difficult experience:

So, their Grade Five students are going to a new place, or they're not going to have the same kids that they have right now. Right, so there's all this excitement about new kids [at the beginning of the school year], but it's also stressful because you just said goodbye to some really good kids. And it's a month later and you're full on into it [teaching] again. I think that nobody really understands the relations teachers [have with kids] who do a really good job with [building] relationships with kids. It's hard because you're so invested, but you're also excited for them [to move on in their education].

To these participants, being a good teacher or leader required bridging health promotion efforts with establishing positive relationships with students. If being a Health Champion was showing improvements with their relationships with students, or *students as persons*, they would continue their hard work of developing and implementing CSH projects. These findings coincide with Keltchermans' (2005) and Saunders' (2012) findings that educational actors rely on their understanding of "good" teaching or leadership as a foundational aspect of their professional identity.

Furthermore, as described in Chapter Two, educational actors demonstrate a willingness to do any work that improves *students as data*, and so the rationale for adopting CSH that "healthy students are better learners" (Alberta Health Services, 2012) resonated with the participants. Alberta Health Services (2012) further suggested that "the CSH approach has been linked to higher test score in core subjects [math, science, and reading] and standardized tests, higher rates of high school completion, and lower drop out rates" (AHS, 2012, p.10), directly aligning CSH with *students as data* to convince educational actors to take on this work. This argument directly appealed to the entrenched grammar of schooling as a place for students to achieve high grades on standardized tests as described in Chapter Two. In addition to providing the participants with building stronger relationships with students, CSH was positioned as having a crucial role in improving student achievement.

**Health Champions and Complexity Leadership.** A foundational feature allowing the study participants to act as Health Champions regardless of their occupational role dealt with their conception of leadership. Morrison (2002) described this type of responsive and distributed leadership as necessary for complex adaptive systems to change, and he suggested that leadership is a behavior that could be displayed by any unit in the organization. For the most

part, the participants viewed leadership as a function, and therefore, any person in any capacity could take on the leadership of CSH initiatives. While conceding that the managerial control held by the school administration team could enable or disable their reform efforts, the participants suggested that leadership itself could be held by any individual in the school community.

This view of leadership as a behavior is significant as it was also held by the two former educational assistants, Holly and Phoebe. To take on the role of Health Champion, both of them would have to see their ability to enact change as being beyond the constraints of their assigned duties as EAs – a revolutionary attitude, given the low status assigned to their occupational role (Brown & Stanton-Chapman, 2017). Phoebe’s response to the question of what makes good leadership reveals her understanding of it as a function not a role:

*Phoebe:* Like emotional expression with school leadership. [pause]... I feel like it's a lot of work, but it's so fulfilling [to be a leader] – you just see the results from so many different angles. You see the character of the kids. You see the health of the kids... You see it. You see the results versus something where you're like, “sigh, this isn't working.”

*Astrid:* Yeah.

*Phoebe:* It just you see results. Might be a lot of work. But it’s worth it.

*Astrid:* How would you how do you define school leadership?

*Phoebe:* So yeah, I would say classes help develop leaders, whatever types of leaders – school or the health leadership – and then you bring those kids [together] in groups, so you've got your SWAT [Student Wellness Action] team. To me, there’s different levels of leadership types, and [it’s impacted by] the size of school, right? In my little rural schools, all of those [student leaders] were one group, right? Your SWAT team was all of those.

*Astrid:* Yeah. It's interesting. So, you wouldn't associate school leadership...

*Phoebe:* [interrupting] Oh, like Admin? [laughs]

However, in terms of making projects or ideas proceed, gain traction, and become a part of the school culture, the school administration team was perceived as holding a gatekeeper role. In her experience with being a Health Champion, Maui found that:

[CSH/Reform] lives and dies with the administrator – if the administrator is talking CSH and having a conversation about it, and modeling it, and is taking the time to truly implement it, then I think it will be a culture, and it will stick.

All five participants listed empathy, persistence, and openness to change as essential qualities in administrators so that they could persist with their work as change agents. These qualities align with the forms of transformational (Leithwood & Seashore Louis, 2012), emotional (Harris, 2004), and distributed (Morrison, 2002) leadership as being optimal conditions for these change agents to perform at their best. The mechanistic bureaucracy still used in school management was seen as a hindrance to the complexity leadership (Morrison, 2002) valued by the participants in this study.

### **Health Champions and Change**

Each of the five participants was heavily involved in health promotion efforts in their local areas of Alberta and the provincial educational system. As a result, experiences with implementing change emerged as common data provided by all five participants, with the focus being on some of the main challenges and opportunities that they faced while trying to improve student wellbeing. Specifically, the participants identified experiences with having a vision for improving their practice; being willing to embrace ambiguity; pacing and timing the reform

efforts to everyday practicalities; and seeking of opportunities to enact CSH in schools, regardless of job or role as impacting their ability to act as Health Champions.

### **Vision for Change**

An important characteristic associated with being a Health Champion related to having a big picture understanding of the educational system in Alberta. The participants attributed having held multiple occupational roles as insight cultivators into how their work at the local level impacted the provincial system and vice versa. Irene described this vision as:

Because now I'm able to keep in perspective my school-based work, but I also still have that provincial, bigger access to people who are big, big thinkers, like system thinkers, who see big pieces of the puzzle. I can call on those people [for motivation, ideas, and support], whereas if I was just in my school, I would be in survival mode, just focussed on lesson planning. I always have that larger view, and I think that's the difference that I have [that makes me a Health Champion].

Maui described how interacting with multiple collaborators in her system role impacted her ability to identify as a Health Champion because:

I would say that with being a [system leader] was a huge highlight because I've always felt that I just did what I did in my classroom and the gym like everyone else, and I wasn't any different until reality hit that [when I visited other schools in my system role and realized my practice was fundamentally different than the practice of other teachers].

She was willing to promote health on a systemic level because she understood her own practice as innovative, and that knowledge gave her confidence to promote CSH to others. She noted that, "I often would think back to why I did things the way that I did when I was teaching, and it was just because it worked."

As described by Hazy and Uhl-Bien (2013), one of the roles of complexity leadership is not only to track the emergence of innovation, but to also introduce it to other parts of the system. As a change agent, Maui was able to spread her pedagogical innovations that she developed in her gymnasium to other parts of the school system by changing her occupational role. Understanding her practice in relation to what was happening with the wider system increased her willingness to act as a change agent back at the local level.

### **Tension and Embracing Ambiguity**

As change agents working to promote health both within local and provincial settings, the five participants in my study reflected on their willingness to operate without knowing the outcome of their work, but that same ambiguity also created tension for them. Developing and implementing new initiatives was the exciting part of being a change agent and could be described as a positive feature of embracing ambiguity in the cusp of change (Kowch, 2016). This ambiguity sparked creativity and allowed the change agents to use their previous knowledge and experience to develop innovative responses in new environments.

Phoebe discussed her excitement in designing or implementing health promotion initiatives as she began her student teaching because “I have the ability [to implement] that fairly easily, but if you’re asking me specifically what I would do, I don’t know. It’ll depend on what kids need, what’s lacking in the school I’m in.” She had no doubt that she would find ways to promote health in her next school setting, and she was completely comfortable with waiting until she saw the emergent needs of the students before using her experience to promote CSH.

Conversely, Maui identified the tension created by educational turbulence by funding reductions (Johnson, 2013) as a negative experience with ambiguity in the cusp of change.



Although she trusted her knowledge and skill to develop health initiatives regardless of her occupational role, she felt anxiety about her lack of control over her future:

I put my hope in and trust that things were just going to align, and I was going to end up where I needed to end up, and that was tough. I think that's [because] of the controlling piece of who I am. And both times, I landed on my feet and landed where I needed to be. But it's tough to let whoever, the powers that be, guide you in any direction... and just be able to be at peace with just riding the wave, and the wave's going to take you where you need to go. But it was tough to let go and not have any control over where you were going to land.

Having control over the consequences of change appeared to alter how Maui viewed ambiguity. She was very excited as she spoke of implementing new initiatives, but when she discussed experienced disequilibrium that was imposed on her by external forces, she felt anxiety and helplessness.

### **Seeking Opportunities to Promote Health**

A defining feature of the five participants is their willingness to seize health promotion opportunities as they emerged in their school or system roles. Phoebe said that "going in [to her current student teacher placement], I will be like, 'What do we do? What do we do?'" She expressed a willingness to jump in to projects that promoted student and staff health, even in an unpaid, short internship.

When Irene moved from a system role to a teaching role, she used her knowledge and connections to establish CSH in her new school. Doing this work was voluntary and not an expectation of her teaching job, however, the opportunities to create better health for her students motivated her to continue her work as a Health Champion.

I've only been in my building for a short time, right? So, when I first came from my system to my school, there were so many things that I have seen and done in different schools with other different teachers, even provincially, and to see all these different things that are happening, you have more tools in your toolbox that you could just like draw from [to make changes happen]..."I know this partner because I've worked with them at the system, so I have a personal connection with them." So, if I were to ask for support or something that would help my school, I get more support than if I did not have that experience.

Maui used her role in school administration to develop her vision of Comprehensive School Health into the basis for developing the culture of a new school:

Being able to start a school from the ground up, and being able to hand pick our staff, we were very adamant in our interviews to talk about Comprehensive School Health: "What do you know about it? When you talk about wellbeing, what do you do for your own personal wellbeing? How do you share that with your students? How do you be vulnerable in front of your students? How do you share pieces of your story with your students?"

The advocacy to promote CSH could be viewed a career mission and a part of their professional identity. As discussed below, this identification with the role of Health Champion is a key aspect of their emotional labor.

### **The Time and Pace of Change**

The tensions generated around the timing and pacing of change are problematic in schools (Nocon, 2008; Sannino, 2008; Stolp, Wilkins, & Raine, 2014), and the study participants also identified these two factors as influencing their ability to influence change. Irene suggested

that the regular school calendar strongly influenced her ability to enact her vision of health at her school, “I think it ebbs and flows with the way the school year is too... or the week, or the weekend, or a long weekend or holiday...” because the daily and yearly expectations associated with schools make it more difficult for her to complete her voluntary work as a Health Champion:

It’s more just like, “so, these are the things that I’m responsible for, what I need to do for my job that I need to do.” I passionately want to do a good job of my job. I feel the most reward when I do a good job. So, sometimes, the good ideas, the great ideas, help me to do my job better. But at the end of the day, there’s only so much gas in the tank. So, however fast you think I’m going to do the work [of a Health Champion], it is probably not as fast as I’m going to do it.

Holly, in her role as a system leader, noted that “the uncertainty [of completing a mental health initiative] doesn’t bother me.” She was confident that she and her team would get the work done in the time and at the necessary pace, however she conceded that the completion timeline would not be quick and would be highly dependent on the school-based personnel.

I think that part of our job with the Comprehensive School Health and Wellness is to let those teachers work at their own pace. Everyone’s going to get to a certain area at their own pace... Because if you just say, “We’re all going to work on mental health, and we’re all going to be amazingly strong people at the end of six weeks”; it’s just not going to happen. Right?... It could take people years to get where you want them to be, but I think it’s a huge thing [to let them go at their own pace].

However, the slow but steady movement by Health Champions in enacting change has gained momentum over time, with the discussion about wellness becoming a central focus of Physical

Education programming, and increased awareness about staff and student health becoming a feature in more school cultures. Sunita, from her external system role, noted that:

The momentum has built significantly over the time that I've observed, and from a lot of different investments and in terms of time and resources... I don't remember a turning point, and I feel like I was there through that transition. What started out as disjointed or almost one-off approaches to health promotion became quite a bit more cohesive.

Phoebe described the experience of developing a small project that changed the perspective of other educators on promoting positive mental health. She and the district Wellness Coordinator filled Rubbermaid bins with a variety of resources related to incorporating mindfulness in classrooms to share with other educators. The process of developing the bin, testing it out with Phoebe's assigned student as an educational assistant, sharing her success with her supervising teacher, and then the Wellness Coordinator subsequently sharing the positive experiences of using the bin with the wider community reflected how the one-off projects identified by Sunita could become system-wide health promotion initiatives.

I think that was my saving grace because I did work with that Comprehensive Wellness Coordinator. We built a mindfulness tub and stuff, and while we were showing others all the stuff that we had built, I was going through that [difficult time] with [a highly reactive student]. And I was like, "Ah, I need to sign that kit out and I'm going to show it to [that student]." I was thankful that I had the training I had when I dealt with [that student], because I had gone through all that Comprehensive School Wellness stuff. And I was happy that we [Phoebe and the Wellness Coordinator] could bounce stuff off each other, and that I had those ideas that I could even try on [the student]. First, I'd clear it with the teacher. I'd be like, "I'll get the mindfulness kit!" and she'd be like, "Yeah, do that. Tell

me how it goes.” And then we would, which then would impact the other teachers because I’m like, “Hey, I tried this, want to try it with your whole class?” And then I would get excited because I saw the success with [the student], and then I saw teachers trying it with their class... I want to be able to help. Because I think of that as my role as the wellness person in my schools, but also with having the district [person] to help.

Without Phoebe, the Health Champion, contributing to the work of the system level Wellness Coordinator and vice versa, the bins might not have ever caught on with the other teachers. The support of her teacher was crucial to her ability to innovate, reflecting the positive impact an open-minded teacher had on developing the leadership capacity of an educational assistant.

Because Phoebe was able to demonstrate that the resources in the bins worked in practice, the adoption of the innovation was accelerated and adopted into the practice of others. Her experience shows the importance of change agents within the cusp of change because they will innovate to creatively solve problems when faced with flux (Kowch, 2016), and that excitement from others with the innovation could encourage them to continue acting creatively. Paying attention to the emotional labor of change agents during times of flux could be important to ensuring that reforms are implemented.

### **The Phenomenon of Emotional Labor: Teachable Moments and Lived Experiences**

Hochschild (2003) described the distance between surface and deep acting as the emotional labor of people working in organizations. She suggested that greater the duration and intensity of performing surface acting while engaged in the work of an organization, the greater the emotional labor. Conversely, engaging in work that aligns with deep acting, or agreement with accepted organizational emotional rules, then emotional labor can be a protective factor for the employee (Humphrey, Ashforth, & Dieffendorff, 2015).

In the case of the five participants in this study, the deep acting was consistent with their willingness to act as Health Champions. They associated the sustaining aspects of their work with altruism, heart work, and alignment of passion and job role, and the defeating aspects of their work as a form of loss.

### **Sustaining Deep Acting: Altruism**

Initially, the Ottawa Charter (1986) and other foundational documents from the World Health Organization were founded on the ideal of “Health for All” (WHO, 1997). To develop a safer and healthier planet would require advocacy and commitment from engaged and active persons who would take on the challenge to realize this vision (WHO, 1998). Irene, Maui, Sunita, Phoebe, and Holly all expressed their deep dedication to using health promotion as a tool for creating a better society.

*Sunita*: “I want us to make a better society to support the issues that most need it.”

*Irene*: “So whatever you’re there to do, it’s to make [the place] better.”

*Phoebe*: “I just want to be able to help.”

*Holly*: “I felt that we had gone in the direction in the division where I’d always hoped we’d be. Where we’d get to that spot where all our teachers and all of our schools felt valued and important... But just being able to see that we had made this possible. I just felt like I had actually contributed to it. So, it made me feel good.”

*Maui*: “But I think what keeps us moving forward is the energy, and the excitement in those kids’ faces, that’s what keeps people going. That’s why we do what we do. That’s why we work so hard.”

All five of the participants became very animated and passionate when they expressed their deep desire to make the world a better and healthier place for staff and students indicating

the idea of deep acting. The organizational values of CSH aligned with their personal passions, so the work they did felt deeply rewarding. When asked about how important CSH was to their personal practice, I observed and noted in my interview notes that each participant gestured to the middle of her chest, right over her heart. This discussion generally led the five participants to describe the *heart work* involved in being a Health Champion.

### **Deep Acting: Heart Work**

The heart work of a Health Champion was a phrase used by Irene as a play on “hard work,” and the term reflected the passion of educators involved in doing the work they love (Nias, 1996). Although the task of implementing CSH programs and projects was difficult, time consuming, and voluntary, the study participants persisted because of their passionate belief in health promotion. For Holly, coming to understand the necessity of health promotion came from witnessing the passion of other educational actors. She became willing to take on the hard heart work because of her altruism:

When I first went into my first wellness board meeting, I didn’t know how important it was, and I was a little leery myself thinking, “I have no idea what this board is even like or what they’re going to want.” But when I watched those teachers talk about how important it [wellness] was and how they’re just amazed at having a wellness board working together on their wellness, that was when I was able to say, “Now I can do something for these people because I can go and get them the funding that they need to keep this going, and I thought that was huge.”

Phoebe came to health promotion because she was entrusted by her supervising teacher to assist with coaching students through a course based on nutrition while she was an educational assistant. When she encountered success with her students and was recognized for her efforts by

their parents and her supervising teacher, she took up the Health Champion identity as a core part of her professional identity.

Well, I did end up teaching parts of a quote unquote “Foods class” to Grade 10s in my EA Role. I had a teacher facilitator who supervised my work. They gave me the CTS modules, and then I [in consult with the teacher] altered them because I wanted them from a health base. When I agreed to do [help with the course], I said right away, “I am not teaching them the deep-fried foods. I’m teaching them healthy foods and how to alter it to help, like if they’ve got a celiac boyfriend...” So I pulled in the good stuff into the Food’s class, then also put it into our canteen because then I would get them to [make better food for the school]...cooking the chicken for the chicken wraps or that kind of stuff. So that was my passion – how to teach kids how to be healthy. [um] And I remember talking to some of the parents, and they’re like: “I love that you’re helping to teach Foods!” And I’m like, “I don’t know all the why’s and the how’s of teaching. I don’t have that educational background for that.” They’re like, “you got my kid to eat spinach, and like it, three times!” [laughs] Because I snuck them into Spinach Feta scones instead of plain scones, things like that. So that was where that passion came from.

With Maui and Irene, they described themselves as natural Health Champions because both began their teaching careers instructing Physical Education and Health. Unlike the media stereotypes of Physical Education Specialists described in Chapter Two, both participants were committed professionals who believed in promoting the wellbeing of all their students in a safe environment through increasing the students’ physical literacy. Irene expressed that “always in the work that I’ve done, I’ve stayed true to my Health and Phys. Ed passion,” and Maui described how moving from the gymnasium to a provincial role was:



Exciting... I think I was able to bring a little of that piece [of Comprehensive School Health] to the world, and I think my job provincially was to bring life to the work that I was doing in my district that we had just started, but then being able to share our journey in that district, but then at the same time being able to see what other districts were doing – that was really, really powerful.

For Sunita, having more of a policy role, she expressed that policy development was a “standout feature of my work... I know I love the concept of collaboration and those synergistic effects and knowing that we can accomplish more together than we each could individually.” Although she did not work with students directly, seeing team members enact policy effectively fueled her drive to complete her CSH heartwork. However, when heartwork does not proceed as expected or big obstacles are encountered, occupational heartbreak can be the result.

### **Deep Acting: Loss, Occupational Heartbreak, and Educational Turbulence**

The most profound and negative experiences with emotional labor of these five Health Champions was related to loss associated with their change efforts. Loss related to educational turbulence (Johnson, 2013), particularly funding, had the most pronounced and protracted impact on the efforts of my study participants. Sunita suggested that new projects were often dependent on short term or grant funding, and Irene found that implementing reform initiatives required a long-term commitment before positive results were apparent. Unstable funding negatively impacted the participants in this study as they tried to make CSH initiatives work. In the case of Maui and Irene, they both experienced the most difficult aspect of funding reductions: being laid off from the occupational roles that allowed them to do their heartwork. Irene described the experience of being labelled as surplus:

When I got surplussed. I was pretty tough [long pause], for sure. [long pause]. I think because it's like heart work, so when you invest so much in the people that you work with, and then it just ends. It's done. So, there's not that same goodbye that you get like when you choose to leave a school when you're saying: "OK... I've done everything that I can do here, and I'm going to move on and go do something I'm excited about." But when you're surplussed... It's a sense of like [long pause]: "We don't need you, your work anymore; that piece of work. We don't need that anymore." Even though it's supposed to be for your [professional] growth to move on [and the administrators say] "So, you need this next perspective to go on to your next challenge," but you're not choosing that.

Irene's assumptions about the value the organization placed on her work were shaken. The loss of her job was painful because the organization did not recognize the wide-ranging impact her time, passion, and voluntary sacrifices by being a Health Champion had on the system. After a break and some time to recover, she continued to work as a change agent in a new role. She suggested that the pain of experiencing occupational heartbreak was devastating and enduring and did impact her willingness to initiate innovation.

Similarly to Irene, Maui's job was impacted by funding reductions which caused her to describe an experience of occupational heartbreak. Having had an administrative role that provided her with structural leadership, she was not eager to return to the gymnasium where she felt that she would have less impact on changing the system. Unfortunately, the group with whom she worked all had similar skills, meaning that they all were applying for the same job openings. Maui's sense of loss was connected to the destruction of her relationships with other Health Champions:

So, when I was with the district, I was in the role as a system leader. We were told in April that in May of that year, all of our positions were getting cut, and our group was all going back into schools. We were also told [by administrators] that, “We've got your back, Maui. There's lots positions out there, and we've told the principals that we have all these great people that are going back to the schools that probably should be put into more of a leadership position.” The toughest part was: we still had to apply for the positions. And our team of five, we were all interviewing for the exact same positions. So, I'd go in to an interview, and then I come out, and my colleague, who is also my friend, is standing there going into his interview for the same job, and then we are all going back down to our roles and are expected to just keep rolling. And it was such an eye opener to be only a number. So, I always said if I am ever in a leadership role, where I have staff, that first and foremost, they're human beings, and need to be treated as one. They have hearts; they care. The morale was really, really awful. That was really tough because it started to make me think twice about some of the decisions I was making or think twice about [pause], “Was that really what I needed to do?”

In her role, Sunita had the opposite experience – she kept her job, but lost staff when funding cuts occurred. Her occupational heartbreak was related to her sense of altruism, and she revealed that:

I would say that I suffer personally in times of staff transition or team transition so where my work has been reliant on the efforts of many and the team approach – whenever there's been turnover, that's been a real challenge, and because of limited resources... Yeah, my heart sinks. That's where I feel it physically. So, there's a physical reaction... You feel disappointed in that we can't do better or make the world better.

For Holly, she described her occupational heartbreak as one of the lowest points in her career. She quit her EA job because she no longer felt impactful with children and felt powerless to improve the educational system. She did, however, use her heartbreak as an ignition to make an important life decision to become a school trustee, giving her the administrative role she needed to use her leadership skills more effectively.

I guess it kind of started before I even became a trustee. I could just see how the divisions seemed to be kind of spreading apart, and the schools were isolated, and for myself at that point in time, I was working as an educational assistant, and I just I felt so disconnected to everybody. I actually ended up quitting my job. And I'm like: "I don't feel like I'm helping the kids, and I can't support some of the staff that are in the school because I don't agree with what they're doing," and to me that was a real setback, because I was a single mother who was an EA trying to get my teaching degree, and I was thinking, "Is this something I really want to do?" I really questioned it because I saw such a divide between the staff and the division. That was the point when I quit my job; I thought "No, I can't do this anymore." I was done. But then I switched roles after that, and I came in as a trustee, and I felt that I was able to try to make a positive change.

Phoebe, who was also an educational assistant, felt the same discouragement and powerlessness in her role when she realized that she could not have the same impact as a teacher. Her helplessness moved her to begin her teaching degree so that she could make a difference and make the changes that she felt were important.

I felt like a failure. Honestly, I felt super inadequate that I couldn't do it [school health promotion] on my own. Even though I know I didn't have to do on my own. But I just felt like "ugh, no one's listening." Plus, I think I struggled with the fact that I was an EA, not

a teacher because we had lots of, “Uh, EAs are doing that again.” I felt that a lot as an EA with some teachers. I had some really great teachers that understood what I was capable of and asked for my help. So that was hard. That kind of “I don't know enough; I don't have enough education. I'm not good enough.” Those kinds of things were frustrating to me. Because I'm obviously an overachiever type, [laughs] but on the upside, it sent me back to Education so I could go, “I'm a teacher now. Now you have to listen.”

Each of the five participants experienced profound happiness and excitement when their job aligned with their passion and profound loss when their work no longer generated the same results. Understanding the underlying passion and pain, the deep acting, of Health Champions is necessary in light of the superficial acting that emerged as aligned with their roles firstly, as educators and secondly, as change agents. Superficial acting, the masking of genuine emotions by dramatizing expected organizational emotions, over prolonged periods has been linked to emotional exhaustion and burnout (Ashforth & Humphrey, 1993; Humphrey et al., 2015) in a variety of occupations. The phenomenon of managed emotions appeared to have a particular edge as it related to the expression of emotion in educational settings.

### **Managed Emotions: Superficial Acting in Educational Settings**

While completing the data analysis for this study as described in Chapter Three, the experiences of the participants merged into a polyvocal conversation (Willis & Siltanen, 2009) as if the five participants were sitting together discussing the phenomenon. As a result, to capture this conversation, the five interviews have been pieced together as if the participants were having a single conversation about emotional expression at work. Vagel (2104) describes this crafted text as post-intentionality, “whatever the image, phenomenologists must understand that they are not studying subjective intentions, as in purposes or objectives, of individuals, but the ways

meanings ‘come to be’ in relations” (p. 112). The experiences of the five participants, expressed as if in conversation with each other, provides insight into the phenomenon of the management of emotions in educational settings.

### **A Polyvocal “Conversation” of Managed Emotions**

The following is a constructed “conversational” response to the question: Which emotions can and cannot be appropriately expressed in school settings? Sunita’s answers tended to act as a framing of each emotion that subsequently emerged from the data provided in other interviews, so in this section, her responses transition between the emotions that all five participants identified were unacceptable (vulnerability, frustration, and anger), somewhat acceptable (sadness) or acceptable (calmness, happiness) to express in their workplace.

*Sunita:* And in that case, [the appropriate outward expression of emotion in a workplace] doesn’t feel acceptable to be vulnerable in that moment [when dealing with school-based personnel].

*Maui:* We’re a team; we’re a family, and the administrator’s hat means for me to be strong when my team is vulnerable and weak or vice versa: for my team to be able to lift me up when I’m vulnerable and weak.

*Holly:* I think right now, in my position, I think people expect me to be the voice of reason. They expect me to be the person who can bring the room together.

*Sunita:* It doesn’t feel acceptable to show anger or to be visibly angry.

*Holly:* You know, I get that, what you call stressed out, and I’m sure my face feels like bright red because I’m like, “How am I going to respond to this?” But I try, when I feel the pressure, I try to just listen... And, so for me to get upset about what they’re telling me doesn’t help either one of us.

*Maui:* But then how do we deal with those things? How do we bring people up, and build the energy and build the excitement for things? Rather than feeling that we're constantly digging ourselves into a hole and going deeper, because I think that's where the fear and the sadness and the anger and the frustration can easily trickle into our profession for sure.

*Sunita:* To show frustration.

*Maui:* Well, I would say frustration for sure. Because I think a lot of people in the field of education, we like to be in control, and the sense of frustration can come because we're not getting to that point quick enough. Or, there are so many other behaviors that we need to break down and figure out which then brings us back down. So, it's building that foundation again, and then slowly but surely creeping up. It's almost like taking five steps forward, four steps back. Three steps forward, two steps back. The research continually shows that the healthier students are, the better they are academically, but that takes time to get there, and that time and those barriers ... definitely cause a lot of frustration, so then at that point, stop and pause and recheck. We got to recheck in, can we start again. We need to re-reflect, and then we step back on, and we start to take the steps again. But I would say frustration is the number one feeling that you get.

*Sunita:* Or sad. No matter what, you know what you might be feeling internally, that outward expression is steady; needs to be steady to get the work done.

*Phoebe:* When I worked with that 1:1 [severe behavior] kid, I was terrified, because I found out how much he had done prior, after I was working with him. Like "Ohh, he could really hurt me," but I showed him that I could be calm. And helped him learn how to do that. But, inside I was like, "ohh..."

*Irene:* Metaphorically, it's like being a first aid provider to feel that disconnect. [pause]

So, there is a sense of like an emergency, someone who's coming to you in an emergency, whether it's small or actually something big, so you have to put up like a shield to protect yourself from the actual situation, or the emotions that are coming, so that you can deal with it, but then [after the situation is over], I will ask for time [to recover my composure].

*Holly:* I do have a few leaders around me who are extremely calm, and but sometimes, I think some of those leaders, while they remain calm, I feel like they're not engaged either. They're so calm, it's almost dismissive. So, I wonder, "Okay, are they really understanding because they're showing nothing." And maybe that's their way of dealing with situations, but sometimes you see somebody show you that they're listening, not just giving you that stone-faced look. [laughs] But I would say the majority of leaders around me, there is a few who are very easily flapped, and they do seem to get stressed out over certain issues. But the majority do remain calm, and I really value that because I think I've learned from their ability to stay calm. Sometimes is hard to tell the difference between the calm and the disconnect. "Are they calm, are they disconnected?"

*Sunita:* I would say that it's most acceptable to be positive, calm, happy, and relaxed.

*Maui:* Well, of course, happiness. And I have to get emotional when it comes to this, because I'm very, very open about my family, and my little peanut at home, and the fact that I leave my little peanut everyday to come to this place [my school]. I want this place to be a happy place. I want this place to be able to show laughter and excitement and enjoyment and energy because at the end of the day, if that's not how I feel when I come



into that building, I don't want to be there, because I have a little peanut at home that I leave every moment of every day. Right? And that little one needs Mommy.

### **Emotional Labor as Teachable Moments at School**

From the discussion of the appropriate and inappropriate expression of emotion at school, the five participants indicated that, particularly around immediate stakeholders such as students or colleagues, emotional expression should be regulated to teach the organizational rules of appropriate expression. In the case of these participants, they felt that they held a primary role in emotional sensemaking (Weick et al., 2005) in school organizations – they genuinely expressed acceptable emotions and modelled the expected expression of unacceptable emotions.

The five participants suggested that educational actors could express any emotion in school sites as long as they modelled the best way to express that emotion. As a result, rarely would a genuine expression of anger, frustration, vulnerability, or sadness be appropriate, especially in the presence of students – but a managed expression with stated detail about how to regulate said emotion was considered part of the job of the educator. Rather than using surface acting just to mask inappropriate emotional expression, the participants suggested that they felt an emotion, attempted to eloquently describe her own response, but maintained a façade of calmness and authority through this process. As with the previous section on managed emotions, the phenomenon of emotional labor as a teachable moment emerged as a polyvocal conversation through data analysis and will be written as such in the next section.

### **Polyvocal “Conversation” about Emotional Labor**

*Phoebe*: Honestly, I think all emotions should be appropriately expressed so that kids know what is good, and that it's okay to cry; it's okay to have a meltdown. But now, how do you deal with that? That's my take on it – if they see that you're not perfect, or that

they see how you can go through all the emotions, they know it's okay for them to feel them too. You provide a safe place.

*Sunita:* I feel like within my workplace, all the emotions are appropriate. And I don't know if that's just the culture of being in the health promotion sector where people are recognized as humans with a full range of emotions. All of those emotions are acceptable, and it's most appropriate to express those emotions *in a productive way*. So, if I feel anger, or if I feel deflated because I have a project I really wanted to implement, and it was just not going well – to be able to process that, but express it in a way that was productive like, “This is not what we imagined, but we have a good basis to write the next grant. There's no there's no failed proposals just drafts for the next one.” [laughs]

*Irene:* You have to have a range of emotions, but I think [pause] I mean, it's okay to cry [at school]. It's hard though when you're in front of kids for them to see you vulnerable. I don't think it's okay to be arguing with grown ups in the building in front of kids. But I also think that they need to see how real conflict is resolved, and if there is an argument with grown ups, that those grown ups still get along and are respectful of each other. You're going to get along with everybody all the time. But [um], I show a range of emotions to kids, and maybe that's more real. I don't like to see anybody yelling at anyone. When people are yelling at people, like kids yelling at kids or grownups, it just shows a sense of dysregulation or the common expectation of the [school] rules are not being followed.

*Phoebe:* Right, you know that you want to just lose your mind. Where you're so angry and [you say], “[Phoebe] needs to go for walk, I'll be right back.” [laughs]. You don't want to scream and yell at students, but for them to know that it's happened [you've felt

anger] ...You're not going to scream and yell at them... I'm not going to flip the teacher's desk when I'm having a meltdown. But, I've talked to them about it. Yeah, "I can see I see why you flipped that desk, buddy because [Phoebe] wanted to do that before. This is what I did instead. I took some breaths." So just giving them those ideas for regulation.

*Maui:* I think that's a really tricky question because if I cannot show my emotion then I'm not being true and vulnerable to who I am. And I feel that that's not being true and vulnerable to our kids, and I don't feel it's being real. Having said that it's *in what way do I show that emotion?* So, if I'm angry, do I show that emotion by lashing out, being angry, to scream, to yell, to throw things, to hit. Absolutely not. But I have to honor, "I'm angry right now." But then, because I'm angry, I'm going to step back. I'm going to take a moment. I'm going to breathe. I'm going to demo the strategies that I hope my kids and my students eventually will understand and be able to use when they're angry and frustrated. So rather than punching or hitting something, "what else can they do when I'm angry?" Because it's reality.

*Holly:* I really feel like those emotions are best not shared in front of the students. I say definitely share them with your administration, with your colleagues, with the other adults in your school. I think the ability to share those emotions in your workplace, I think makes a stronger workplace and connects people so, yes, if you're depressed, if you're sad, if you know if you're angry: talk about it, especially when people are angry, they just need to vent. So, have an adult, somebody you're working with to be able to just get mad, and say "this is why I'm so upset." Fine, but I think, in front of the children, that's not appropriate.

This imagined polyvocal conversation between the five participants reflects the daily emotional labor associated with school-based personnel. Rather than expressing an actual emotion as it is felt, they use superficial acting to present a regulated, teachable emotion in the context of reinforcing organizational rules. This constant superficial acting reinforces the grammar of schooling and promotes emotional silence, especially with inappropriate emotional expressions of anxiety, frustration, and anger. A question for further study related to this phenomenon is: what could the result of this constant repression of these powerful emotions be?

In addition to the description of an everyday emotional labor as a teachable moment, the five participants also revealed an additional layer of emotional labor connected specifically with being a Health Champion.

### **The Emotional Labor of Health Champions**

The five participants expressed that in addition to their daily emotional labor, they also felt specific tension with respect to implementing health promotion initiatives in their workplace. The main sources of this emotional labor were related to: convincing others to be a part of the initiative; the impact of the change on the work of others; “getting it right” – ensuring that the reform was implemented well and without causing harm; and “getting it done” – finding the time and energy to implement positive change.

#### **Emotional Labor of Health Champions: Convincing Others**

Each participant reflected on the effort they associated with overcoming resistance to change from other educational actors. Holly, for example, described this experience as the difficulties she faced with suggesting small changes:

Even just something as simple as wellness breaks, I would love to be able bring that to my staff, but now, am I stressing teachers out because now, some time in their day, they

have to fit in a wellness break, and they already don't have enough time to teach their students, and the time they want is rushed anyway?

Whereas with Sunita, she felt occasional concern when addressing teachers because "I've worked with teachers who resented that I don't know what it's like to be a teacher." She expressed being puzzled by this response, as she implemented change with other educational leaders, such as superintendents, who understood that she could empathize and innovate to assist with their work without having performed their specific role. As a result, when approaching a group of teachers, she noted that she attempted to be vulnerable and open so that they would be willing to listen to her. Given that vulnerability is one emotion that was described as needing to be managed, this interaction would involve increased emotional labor.

But in Irene's experience as both a teacher and system leader, she considered teacher resistance as pragmatism:

So, I would have a big deliverable due, and they [the teachers] would be in the middle of report cards. The [funders] would be saying that "this needs to be done and handed in by this date," and I would be saying, "Ok, but these are my colleagues working in schools, and this date is not doable – it's their most stressful time."

Her tension was balancing the deadlines set by project funders with the realities of the school-based change agents who would be implementing the program. She found herself in the middle of good people with good intentions but each side needing to be convinced to adjust their expectations about the timing and pace of implementation.

### **Emotional Labor of Health Champions: Impact on Others**

Irene summarized this emotional pressure best by asking "If you want someone to be your champion, why are you going to put more work on them? You want to make their job

easier!” All the participants discussed the problem of work intensification (Apple, 2009) as being related to emotional labor. Their drive to promote health was hindered by the work associated with coming up with project ideas, finding adequate funding, implementing the project in schools, and then assessing the impact of the project on top of their normal work expectations. Each step of that process involved creating more work either for the Health Champion or her colleagues. Because of her reticence in increasing the work of others, the Health Champions in this study voluntarily took on the work and sacrificed their own wellbeing and time with family for the health of others. Sunita described work intensification as the never-ending volume of work.

Sometimes my emotional labor relates to the volume of tasks because it seems like it never ends – your To Do list never gets shorter and that causes me strain. But I would not be able to show that outwardly. So, I’m not going from meeting to meeting and unraveling or feeling frazzled or expressing that I’m tired of all of these things that I have to do.

Irene related that the number of interactions with students during the normal school day added to the intensity of work that needed to be done. She contrasted her experience as a system leader with the experience of teaching Physical Education:

[In PE], you’re dealing with more people. I could teach ten classes per day for thirty minutes, so you’re in it. You have to be in the moment, but then they’re gone, and you have to re-start, and then you’re in the moment and then they’re gone. So, it’s not like when you’re in a system role – it’s a different stress. In the system role, there’s bigger things that you’re negotiating, but they’re not the same [at the intensity of interaction]. In

teaching, you could literally have hundreds of interactions [with students] in thirty minutes. [pause]. And they're not all good.

### **Emotional Labor of Health Champions: Getting it Done and Getting it Right**

Each participant iterated her commitment to promoting health to students and staff in her community. Having the necessary time to be creative and learn about the initiative or health problem needing solving caused strain for these Health Champions. Phoebe described it as “Oh, we need to do something, but who has time?” – a constant buzzing frustration of knowing that good projects could be implemented, but not having the time or resources to make it happen. Sunita described the “beautiful Comprehensive School Health projects that we just couldn't fund.” Underpinning much of the participants' stress was their knowledge that they could only accomplish so much, but they were unwilling to add to the workload of others.

Adding to that stress was a sense of urgency to do Comprehensive School Health “right.” Holly described this feeling as she spoke about the implementation of a new project that was getting underway:

So, in the past, we have been focusing on more physical wellness, but our next Three Year Plan which won't start until next September, we've shifted a little to the mental health... And it's such a new area for us that we're just trying to grab onto any kind of information, any kind of resources we can to help us, because there's so much when it comes to mental health that is so hard to understand. You don't want to make it worse for people. You want to try to make it better, so it's knowing that line of what you can and can't do. It's a little bit more stressful...but it's going to be difficult to find the right way to do it.

Ultimately, the drive to get it right for Maui came from her relational experience that, “I feel that as educators, we’re so tough on ourselves because they just want to be perfect, and they want to strive for the absolute best for their kids.” As change agents with a big picture view of their role in the system, Health Champions may be extra hard on themselves to ‘get it done and get it right’ to ensure that they can achieve their deepest desire to promote health for all students.

### **Summary**

The implications of these conversations about the history of Health Champions, their importance in promoting the health of students and staff, and the compounded nature of their emotional labor is important to ensuring the implementation of change. They felt both the emotional labor associated with working in a school setting (EL as a teachable moment) and the emotional labor of being a Health Champion. The effect of the layered EL could be described as an intensification of EL associated with being a Health Champion. The discussion in Chapter Five focuses on reasons to show care for Health Champions, the innovators and early adopters to ensure that CSH is implemented effectively in schools.



### **Chapter Five: Caring for Our Health Champions**

The five Health Champions interviewed for this study revealed the dual experience with the phenomenon of emotional labor that impacted their work: both the role that it played for them as educators and the role it played for them as change agents. The phenomenon emerged as a crucial aspect of their daily work, and it impacted on their ability to promote Comprehensive School Health within educational settings. Emotional labor existed for them as a recognizable part of their lived experience in school setting. Two main implications emerged as important to them to effectively manage their emotional labor to remain productive and innovative: the desire for safe spaces for genuine emotional expression, and the presence of an inner voice, or “inner coach” (Phoebe) enabled them to align their genuine emotions with organizational rules. Each of these implications and a phenomenological example (van Manen, 2014) describing a plausible account of lived experience with emotional labor of female Health Champions will be the focus of this chapter.

As the narrator of this phenomenon, my experiences as female teacher-researcher-Health Champion with emotional labor while implementing CSH between 2009-2016 needs to be explicated. The language that I used to describe the daily lived experience with the phenomenon is influenced by my experiences because “the language of the interpreter is undoubtedly a secondary phenomenon” (Gadamer, 1975, p.480) that problematizes my data interpretation. By presenting a clear anecdote (van Manen, 2014) from my own experience, I intend to make visible the assumptions that I brought to my data interpretation and the development of the phenomenological example.

**What is the Lived Experience with Emotional Labor of [Six] Female Health Champions?****The Sixth Participant: The Teacher/Researcher**

In 2011, I returned to work from a maternity leave to resume my role as a Physical Education teacher in a school that served vulnerable female students. I became the Physical Education Specialist at my school in 2004, although I was initially hired as an English teacher for the school. My principal knew of my interest in Outdoor and Physical Education, asked if I would be willing to develop a course called “Body Talks” for our students. The aim of this Career and Technology Studies course was to improve the physical fitness of our students – pregnant, teenaged women. I immediately agreed to take on this challenge, despite the fact that our gym was used as a storage room and the only equipment we had was twenty-seven hockey sticks and one broken stationary bicycle.

I did not think of myself as a Health Champion or considered my work as different from that of other Physical Education specialists – in fact, I often felt inferior because I was a generalist teacher with no post-secondary background in Kinesiology. Driven by this feeling of inadequacy, I frequently sought out expert service providers, funding, and professional development opportunities to ensure that my program used the most recent knowledge and practices to be responsive to my students’ interests and fitness needs. I made a lot of mistakes with early program development, but by 2011, I felt a great deal of pride in the courses that I had developed and worked extremely hard to keep them interesting, often using my own money and time to provide the best possible learning opportunities for my students.

Upon my return from my maternity leave, a change had occurred within the school administration team, and my principal, a strong supporter of my (now) Physical Education program, was replaced with a new principal with different priorities. As a result, several of the

pillars holding up my work – in particular, program fees and relational trust (Robinson, 2011) – were suddenly replaced by hardline accountability and micromanagement. Realizing that my program was in jeopardy, I began to seek out alternative sources of funding to ensure that my students still had access to a wide variety of health opportunities. I had witnessed the positive impacts of my program on the wellbeing of my students and was certain, to the core of my self, that in providing opportunities for daily physical activity and good information about nutrition and wellness, I was contributing to the academic success of my students.

As I sought out grants for my program, I came across the Comprehensive School Health framework, and realized that I was already implementing it in my school. If I reframed my work to align with the framework, I could access different funding sources. After seeking out CSH experts in my school system, I began my first project aimed at reducing nicotine use by students in my school. I developed a Wellness Team and used a Health Fair to gather data from students about what they needed to stop smoking. The answer from the smoking students was not unexpected (“Nothing will stop us, Astrid!” was the main response); however, the non-smoking students took this opportunity to be heard. They wanted a quiet “Zen Room” in the school because they felt that they lacked a spot of solitude that they could access in times of stress, anxiety, and frustration. The Wellness Team spent the remainder of the next three years trying to create this space for the students.

The principal reluctantly supported the initiative, but only because I made the project self-funded through grant applications. For reasons of her own, she was not open to sharing or distributing leadership, and eventually, feeling frustrated and disappointed with the lack of progress of the Zen Room initiative, I left the school to pursue other opportunities. Several years have passed, and to the best of my knowledge, the work that I had done at the school left with me

– a change agent who spent numerous years trying to champion health and wellness, but who could not develop a sustainable school culture that would outlive my physical presence.

Despite this experience, I have been open to the experiences of my participants and the emergence of the phenomenon of emotional labor as they expressed it to me. I am not an outsider to this phenomenon, and even as I maintained an attitude of wonder as I listened to the voices of my participants, my interpretation is grounded in my own horizon of understanding. The following implications that emerged from the data analysis were both surprising and familiar establishing a premise for collective story-telling (Willis & Siltanen, 2009) about the phenomenon.

### **Reflections on Caring for Health Champions**

#### **Safe Spaces for Genuine Emotional Expression**

The primary goal of the five Health Champions was to improve the wellbeing of staff and students in schools to create a better Alberta. As described in Chapter Four, the phenomenon of emotional labor in school settings emerged as educators managing genuine emotions to teach students how to regulate emotions to align with organizational emotional rules. The participants suggested that positive emotions, such as happiness and excitement, should be expressed, but negative emotions such as anger, frustration, and anxiety should be regulated accordingly. The effort involved in recognizing one's own emotions, regulating them appropriately, and then teaching about the regulated expression could define a common experience with emotional labor of these educational actors. What emerged from my analysis of the interviews from the five participants suggested that safe spaces, whether they be physical, relational, or mental, are needed for them to express their genuine feelings while at their workplace.

For Maui and Sunita, their safe spaces were relational – these women sought out people at their workplace with whom they could have open and honest conversations about their emotions. Holly’s safe space was physical, as she expressed that she did much of her thinking and emotional release in her car while driving to and from her workplace. Phoebe and Irene found their safe space by taking mental breaks, taking deep breaths, and using other self-calming strategies, such as counting the numbers on the dice in their classroom.

The notion of a safe space for emotional expression in schools for staff was an emergent aspect of this phenomenon that merits further reflection. School administration teams might consider having conversations with Health Champions about what type of space is needed to sustain their efforts to implement reforms without becoming emotionally exhausted. Having time to access suitable safe spaces after emotionally charged experiences could assist change agents in implementing health promotion initiatives.

### **Inner Coach/Inner Voice**

The phenomenon of emotional labor also appeared as an inner voice that narrated the daily lives of the participants. The inner voice emerged as a common method for the participants to moderate their emotions, providing a mental self-dialogue that the person needed to identify, regulate, and articulate their emotional response. Phoebe, from her work with mindfulness, described this voice as the “inner coach” – or the voice that talked her back from the edge in difficult situations. She described it as her values that enabled her to regulate her emotions when dealing with difficult students. Sometimes, the inner coach would remind her to breathe slowly or count to ten before responding, giving her the ability to maintain her professional and calm exterior while simultaneously processing her actual response to the situation. She further suggested that as she became more experienced in her work and learned more about mindfulness

and other techniques through her work as a Health Champion, her inner coach improved over time with assisting her to regulate her outward expression of emotion.

This inner dialogue, described in various ways by all five participants, emerged as a key strategy for managing unacceptable emotions while working in or with schools. The harder the inner coach was working, the greater the emotional labor. So, in cases of extreme emotional labor, for example in working with highly resistant colleagues while trying to suggest a change to practice, the inner voice might be screaming while the Health Champion fought to maintain an appearance of calm and strength. After such an experience, the safe space for genuine expression becomes much more important to preserve the wellbeing of the Health Champion.

The idea of an “inner voice” is the Dasein as constructed by Heidegger in *Being and Time* (1953). He suggested that Dasein, or the spirit, understood and expressed itself in response to both his values and upbringing, and entered into understanding of others in the world from that stance.

Dasein always understands itself in terms of its existence, in terms of its possibility to be itself or not be itself. Dasein has either chosen these possibilities itself, stumbled on them, or in each instance, already grown up in them. Existence is decided only by each Dasein itself in the manner of seizing upon or neglecting such possibilities (p. 13).

The Dasein, Heidegger suggested would subsume its-self to the whims of others – the *they*, in order to fit in with the everydayness and averageness of world that he experienced. However, as the Dasein became attuned the influence of the *they*, the Dasein would struggle with his conception of *self* and being lost to the *they-self*. This struggle aligns with the “inner voice” described by the participants in this study. The *self*, or inner voice that constituted the genuine

emotional response by the participants, conflicted with the *they-self*, the organizationally appropriate expression of those emotions.

If the individual is in a constant state of emotional regulation without having any opportunity for safe expression, the potential for emotional exhaustion and burnout becomes a possibility (Hulsheger & Schewe, 2011; Lee & Chelladurai, 2016). In the case of these five Health Champions who consistently worked at their fullest capacity to implement needed reforms, four of them ended up either quit the profession or took a leave of absence to try to find balance again. Given the importance of Health Champions in health promotion work, the question becomes: How do we recognize that our change agents are experiencing emotional labor so that we can assist them in expressing it so that they can continue to do the good work of health promotion in our schools?

### **The Recognizable Lived Experience: A Phenomenological Example**

Based on the fusion of horizons between myself and my five participants, a recognizable description of the lived experience of emotional labor by Health Champions involved in implementing change has emerged. Crafted as a phenomenological example (van Manen, 2014), the purpose of this description is not to provide a detailed account of a single participant's experience, rather it is a merged account that contains the words, feelings, and experiences expressed by all five participants through a narrative constructed by myself. The intent of this section is to explore the phenomenon as it emerged through the collective expression of experience to illuminate a possible lived experience.

In developing this example, I followed van Manen's (2014) suggestions to focus the orientation of the example on the phenomenon, to edit for factual content but not phenomenological content, to aim for embedding meaning into the example, to write in the

present tense to capture the essence of the lived Moment, to use of person pronoun “I” (the constructed character, Mrs. Pimash, represents the collective experiences of all the participants), to avoid generalizing statements, and to maintain textual features of the shorter anecdote (p. 256). This phenomenological example could also be framed as a cognitive model that can provide insight into school life to create a common understanding of one aspect of functioning in a complex adaptive system (Fidan & Balci, 2017). I was deliberately vague about the occupational role of Mrs. Pimash both to honor the multiple system roles that could be held by a Health Champion and to invite the reader to engage with the phenomenological example from her own perspective without the limits of a job title. The words written in italics are meant to represent the inner coach of Mrs. Pimash – the thoughts that represent her emotional labor as she navigates through a typical school day.

### **An Everyday Moment: A School Day**

As I park my car in the lot of this school, I take a moment to gaze at the rising sun in the east. *What will this day bring for me?* Yesterday was a very difficult day – I met with a parent who insinuated that a teacher had been unfair in grading his son’s English assignment, and he proceeded to question my and the teacher’s authority. I had felt incredibly angry during the meeting, and inwardly screamed, “How dare you accuse me of such professional misconduct? How dare you attack me? You don’t know me!” while outwardly maintaining a calm façade. My heart had been racing, and I knew that the redness in my chest had been slowly creeping up my throat. *Did the parent know how much his words had hurt me? How would I face his son, Fred, today knowing that this conflict remained unresolved?* I took a deep breath, attempting to slow my suddenly accelerating heart, then slowly exited the vehicle.



Counting each step to slow my heart as I walked to the school door, with my key card in my hand, I started to feel hopeful about the day ahead. I always arrive early to school to have some time to plan and prepare for the day. This time, at the beginning of the day, I am my freshest and my most creative. I recently attended a provincial conference on Comprehensive School Health and was very excited about presenting a new health promotion idea with my colleagues. *How would they respond? Would they resent me for bringing in another new idea?* My last nutrition-based program had received rave reviews from parents, students, and colleagues, but would they all jump on-board again? While popular, the program required a lot of work from multiple partners, and I'm reluctant to ask them to help me out again. I will do all the prep work before the first bell, and then I will bring the idea to the staff meeting after school. *If I can do everything upfront, maybe my colleagues will be less resistant to the idea...* Although they're never super excited about new ideas – especially the ones that come up at the end of a long day when they just want to go home. I wish our staff meetings took place at a different time when everyone felt more rested and open to new ideas.

On my laptop, I search a provincial database for funding projects and am pleased to find a grant that would work perfectly for my new project. Then I see that the grant deadline is set for two days from now. *If I write the proposal right now, I might be able to meet the deadline.*

"Mrs. Pimash, do you have a minute?"

A student from my homeroom group is standing by my desk. "Of course," I say, inwardly disappointed that my time for developing my proposal is interrupted but showing outwardly that I am attentive and positive. "What can I do for you?" The student reveals that her parents are taking her on a month-long vacation, and she needs her homework from all her teachers to keep up with her classes. Could I arrange that for her? "Of course," I cheerily reply, inwardly moaning

and calculating the number of people I would have to contact. She thanks me politely and then walks away. Rather than spending time on the grant proposal, I spend the next half hour trying to track down teachers on the student's behalf. *Will I ever be able to get this project off the ground, especially if I don't have time to apply for grant money?*

"Mrs. Pimash, please go to Room 15."

*What now?* I wonder, and I walk down the hallway. As I approach Room 15, I see that the classroom teacher and most of her class are standing in the hallway. Muffled screams are coming from the classroom, and the students look nervous and act jittery. "What is the problem?" I ask with concern. "Fred" is the one word reply from the teacher. She looks at me expectantly because she knows I met with his parents yesterday, and I attempt to stay calm as I make my way to the doorway. *I hope that the discussion we had with his parents yesterday didn't trigger this behavior today.* Fred has a severe behavior code and does not manage his anger very well. The teacher has spoken to me numerous times about her struggles with his outbursts, and she has expressed to me that the other students are frightened, and their parents are threatening to pull them all out of her class. *Be calm, Pimash, they're depending on you to fix this situation.* I tightly grip my shirt sleeve and smile reassuringly at the teacher and students.

I realize that I have no other option than to walk into the classroom and try to talk Fred out of the classroom and into my workspace. Fortunately, I have taken training in non-violent intervention, so I try out a strategy the course instructor had suggested.

"Fred, you know, I've been really angry too, but instead of yelling and throwing desks around the classroom, I talk to my inner coach who tells me to take ten deep breaths with my hand on my heart. It calms me down." He looks at me like I'm crazy, and I feel a pressure behind my forehead, *what if he throws that chair at me?!*, but then I see his hands relax on the chair he's

clutching. “Hey, Fred, how about you breathe with me with your hand on your chest?” *Keeping talking, Pimash, he’s coming around.* He slowly calms down and agrees to come with me back to my workspace, but only if I promise not to call his parents again. *Whew, he’s coming out of the classroom. Get him away from here first, then we’ll discuss how to address his parents.* As we walk down the hallway, he turns to me and says, “Mrs. Pimash, I think my inner coach is on vacation today.” We both laugh, which feels great, but as I turn around, I see the teacher watching us, and under her breath I hear her mutter, “I don’t know how Mrs. Pimash can laugh at a time like this.”

*I either laugh or I cry,* I think to myself as I shuffle Fred into my workspace. I give him a laptop loaded with a learning activity and a timer, and he agrees to work for twenty minutes, and I agree to only make a note in his file about his outburst. *Great! I have twenty minutes to get back to preparing my proposal to give to my colleagues and maybe start that grant application. The application might be rushed, but at least I can submit it on time!* Both of us get to work on our tasks, and I try to focus on this task, although I stay alert because Fred could have another outburst at any time.

True to his word, Fred works for exactly twenty minutes. When the timer goes off, he begins to talk to me, and we discuss some of the better ways that he could manage his anger. He tells me about his father, a violent man whom Fred has witnessed beating his mother until she ended up in the hospital. After the meeting yesterday, his dad was furious and punched a hole in the wall. Terrified, he and his mother left the home to stay with his grandparents, and he spent the night sleeping in an old chair. His eyes well up with tears, but instead of letting them out, he angrily wipes at them. *Was it my fault that he was homeless today?* I had read his cumulative file

before the meeting and knew a bit about his home life, but I didn't realize the extent of his problems.

Fred begins to clench his teeth and grip the table. *Oh no, he's escalating again – stop being guilty, Pimash, and do something productive to distract him.* Forcing a genuine positive and upbeat tone to my voice, I say, "Let's go down to the gymnasium and see if you can walk on a treadmill." *Scan the room Pimash – where can you hide if he starts throwing things in here? Put those scissors in your desk.* "Ok," he says, and we both make our way to the gymnasium. As we walk down the hallway, he punches on every fifth locker, and despite my repeated requests for him to stop, he does it anyway. *Count to ten, Pimash,* I think to myself -- although instead of counting, I'd rather scream *STOP!!* My head starts to pound each time his hand smashes a locker. After what felt like the longest walk of my life, we reach the gymnasium.

I greet the Physical Education teacher at the door, and she looks fatigued. She takes one look at Fred, and then motions him towards the treadmill nearest to her sound system. He goes over, switches the satellite station to death metal, and begins walking. I thank her for helping me out again. She and I realized a couple months ago that walking on the treadmill helped to calm Fred down, so when I show up with him, she knows he needs to join her classes. *Ask her to help with the proposal!* Before leaving, I turn around to ask her if she would like to be involved with the initiative. I have asked for her help numerous times in the past and know that she has the same passion to promote health as I do. I can always count on her to support wellness initiatives, and because she was also at the conference with me, she also knew about the importance of wellness breaks for staff. *She looks so tired.* Before I can say anything, the bell rings and a double class of fifty Grade Five students enters the gym. *Now's not a good time to talk to her,*

*Pimash, given the loud death metal music and all the students running around. Send her an email.*

*What?! It's 1:00 pm?! Somehow, I've missed lunch again, and my stomach starts to rumble. I have also had to pee for about an hour but haven't found the time to get to the staff bathroom which is located on the second floor on the opposite side of the school. I decide that I should head to the bathroom and decide to take a back route so that I don't run into anyone. In the stairwell, I bump into the English teacher, someone else I've hoped to speak to about my idea and also to give an update about Fred. She smiles but doesn't slow down, seemingly also in a hurry to get somewhere. Remember to send her an email about the wellness breaks idea and Fred.*

Back in my workspace, I realize that I have thirty minutes until the staff meeting. I always feel anxious and nervous to speak to them, because the first time I brought a policy idea to them, they reacted very unfavorably to my idea. I thought that the policy change regarding nutritious snacks in the canteen should be an easy sell because the school principal and superintendent both wanted the change to happen. While speaking to the group, I sensed that consensus to change the food choices in the canteen had not already been reached. I forced myself to calmly make a case for the policy change, but I had struggled to keep my hands steady, feeling vulnerable and uneasy. They eventually had agreed to the changes I proposed, but as I drove away from that previous meeting, I was so reflective about the experience that I drove right by my driveway. Ever since then, I have always had to give myself a bit of a pep talk to get up my courage to speak to my colleagues again.

*Ten minutes until the meeting – shoot. I am not prepared, and I don't want to propose this idea unless I know that I have gotten all the pieces right. Wait until the next meeting, Pimash.*

*You'll have done more research and will have a better proposal to offer.* I feel deflated that I can't seem to find the time to get this idea off the ground. I wish that the conference had been in the summer. I am more rested and creative in the summer, and I always seem to come up with my most innovative ideas for health promotion while I'm sitting in my back garden. *But the summer is meant to be spent with your family, Pimash. Your little monkey needs you.* Summer is several months away, and if I wait that long, then I might never be able to enact this important reform, plus the grant deadline is now less than 48 hours away. *I'm a failure as a Health Champion – how can I give myself that title if I can't do the work?*

The final bell rings, and I gather up my belongings to head to the staff meeting. Although I'm feeling down, I try to perk myself up before I get together with my colleagues. *This idea is good for them too – they'll jump onboard, Pimash.* My mind is foggy from being on the go all day, and I'm still feeling rattled by my earlier encounter with Fred. I know that when I see his classroom teacher, she will want to talk about which steps we can take with him, and I don't feel like I have enough knowledge to make any good suggestions. My inner coach pipes up, *Pimash, you won't get anything accomplished with all these negative thoughts, be positive – you'll figure out the best solution to this problem!* With these thoughts, I head into the meeting.

As I walk through the doors, I run into the PE teacher.

"Hey, Mrs. Pimash, I sensed earlier that you wanted to talk to me," she said.

"Yeah, I did," I replied, and then I told her about how I wanted to implement the wellness breaks idea from the conference.

"Yes, I'm all in!" she said without hesitation, "I'm so happy that you said something, because I wanted to talk to you about it! I knew that you would take the leadership, so I was just waiting for a signal. Want to meet up tomorrow morning and we can get started?" I felt

overjoyed and excited knowing that I had a person that I could trust onboard. We are joined by the English teacher and the library assistant. “Mrs. Pimash has an idea – do you want to help us?” the PE teacher asks. Without hesitation, both colleagues agree to help out, and no one mentions Fred. *With these great supporters, I know we can get this initiative off the ground!* For the first time all day I felt like I was with my people who understood the importance of being a Health Champion. My heart stopped racing, my mind relaxed, and my inner coach smiled. *I can make this initiative happen, and this school will be a better place for staff and students.* “Want to sit together at the meeting?” I asked them.

“Yep.”

### **Developing Hope: Tomorrow is Going to be a Good Day**

Hope for a better, healthier school community is the organizational value that Health Champions depend on to persist with implementing reform initiatives. Heidegger (1953) described hope as the partner of fear for the dasein, and both emotions were constructed from anxiety, the uncertainty associated with the future. He suggested that anxiety could be resolved through a positive perspective (hope) or a negative perspective (fear), and that both were developed from previous experience with a phenomenon.

The deep acting, described as heartwork and altruism by these five Health Champions, created the drive to implement reforms to improve student and staff wellbeing. This altruism and heartwork come from a place of hope – a positive outlook that they associated with successful experiences of implementing reform in the past. Their commitment has helped to build the momentum to move the ideals outlined in the Ottawa Charter (1986) and subsequent policy documents. Caring for and about their emotional wellbeing and attending to their emotional labor might be a key component of ensuring that CSH is implemented in school systems.

Morrison (2002) described the interaction between an individual and its environment as feedback, which could be either positive or negative. In the context of this study, positive feedback from the environment of Health Champions was seen as improved relationships with students and other staff – both aspects of emotional labor that would ignite the change agent to continue her work. Negative feedback caused by occupational heartbreak, educational turbulence, and emotional exhaustion would deter a Health Champion from continuing to innovate and be creative. Understanding the concepts of emotional labor might be a consideration of a leader making an environmental scan before attempting to implement reforms in a school setting (Fidan & Balci, 2017; Morrison, 2002).

### **Implications: What Leaders can do**

Developing wide-ranging implications for practice was not the intent of listening to these five participants, although some suggestions could be considered by leaders. School administration teams could provide their staff and themselves access to safe physical, relational, or mental space after intense emotional experiences to release their organizationally inappropriate emotions. Educational organizations might recognize the importance of the Health Champion's work by giving them the time to research and implement CSH initiatives as a part of their regular work day, not as a voluntary extra load in an already crowded schedule. Funding organizations might consider altering their deliverable deadlines so that they align with the less busy times for Health Champions in the school calendar, and fund longer term projects that give Health Champions the time to convince others to join them on their journey to greater wellbeing.

Further, the Health Champions themselves might consider striving to become known as Health(y) Champions. The word "champion" originated from the battle field describing a fighter who is victorious (Liberman, Hoptman, & Carlson, 2010) or "one who fights on behalf of



another or on behalf of any cause” (Stevenson, 2010). This title connotes a person who is fighting for health, or the wholeness, (Lieberman, 2009) of others without regard for their own state of wholeness. Using the adjective form of health, which is healthy, changes the focus of the title so that the word describes the noun – or the Champion themselves. The participants in this study noted that in their quest to create healthy school communities, they often sacrificed their own wellbeing by working long hours, volunteering their time for school activities that kept them from their own families, and pursuing professional development during vacation periods. Rather than fighting for the noble cause of health, they would be focussed first on becoming well themselves and then advocating for the health of others.

### **Areas for Further Study**

The lived experience with emotional labor of these five Health(y) Champions could open a discussion with other innovators working to implement major educational reforms. By understanding the necessity of deep acting to provide the basis for persistence and the potential of surface acting to result in emotional exhaustion or burnout, the lived experience with emotional labor of the five participants reinforces the idea that emotions have a role the adoption and acceleration of innovation during times of flux. Attending to the emotional needs of the individual involved in implementing change might have a role in reforming systems and should continue to be an area of research.

Further study would be necessary to make claims about the nature or extent of emotional labor on the adoption or rejection of innovation, as this small, hermeneutic phenomenology does not intend or have the capacity to make larger such connections. The aim of the description of lived experience with emotional labor is to ring true to other change agents who, in reading the phenomenological example, might recognize a shared meaning or experience in their own

practice. Whether or not other innovation champions recognize this lived experience as influencing their ability to enact reform is an area for further study.

Four of the participants in this study were system level leaders, providing some insight into the emotional labor of system leadership. Interestingly, the appropriate expression of emotions associated with their work as Health Champions aligned with the school level personnel, however they expressed that intensity of the experience differed. The four school level participants expressed more intensity of emotional labor when they were based in schools than when they were moving between schools. This difference in intensity was not a focus of this study but may merit further research. Regardless of occupational role, the commonality of the experience of emotional labor by all the participants provided some interesting insights into the phenomenon.

A topic needing further study emerged from the interviews with Phoebe and Holly – former educational assistants who valued their role in championing health. Educational assistants and their capacity to enact change at the school or system level merits additional research. At the bottom of the traditional hierarchy in the Alberta educational system, the contributions of educational assistants have been overlooked, but they could provide some alternative ideas about reforming schools. Both Phoebe and Holly described feeling unheard in their EA roles, despite having leadership qualities and abilities. Reforming school administration to allow for complexity leadership (Morrison, 2002) could encourage innovation from all members of the school community, not merely those in specific managerial roles.

The aim of this hermeneutic phenomenological study was to illuminate the everyday experience with emotional labor of five female Health Champions engaged in implementing educational reform. The constructed phenomenological example aimed to provide insight into a

lived experience in the hope that others will recognize it as meaningful in their own work to enact change. This example merely provides a single entry-point into a complex phenomenon, but I hope that it provokes dialogue and further study about the emotional labor of change agents in educational settings.

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## Appendices

### Appendix A: Letter for Consent

#### Letter for Participant Consent (Final copy to be on University of Calgary letterhead)

Thank you for your interest in being a part of my [Astrid Kendrick] research study on the lived experience of emotional labor of educational actors involved in implementing educational reform. Your insights about your lived experiences are very important in this study, and I am open and willing to learn from you.

The interview will take about sixty minutes, and you will only need to meet with me one time. If you agree, I will provide to you the unaltered transcript of this interview (with some of my insights and questions) for review as I begin my data analysis. You will be encouraged to make notations, explanations, or add ideas to this transcript to help me understand your lived experience.

Your participation is voluntary, and you can decide to leave the study up until I begin my data analysis (January, 2018). If you do not wish to remain in the study, the data that you provide to me will be destroyed unless you agree that I can use it. When writing up my final report of my study, I will use a pseudonym for your personal data (which you may choose, if you wish) as well as for the school site. My aim is to protect your privacy, and will work to ensure that your data be unidentifiable to anyone but myself. The data gathered from this study will be kept for five years, and then it will be destroyed as per University of Calgary policy.

The final report of my study will be written up as a collaborated account of all the participants' life experiences. Although your data will provide insight into the phenomenon of emotional labor during reform implementation, the final product will not reflect an account of given by a single individual. As such, the final write up will include your insights, and possibly some anecdotes related to your experiences, but will not be a description of your individual life experiences.

The conclusion of this study will be my doctoral dissertation, so I do stand to benefit from your participation. I have not received any financial assistance to do this study, but I will benefit educationally.

Thank you so much for your willingness and openness to participate. By signing this letter, you agree to be a part of my study.

With regards,

**Astrid Kendrick**

Doctoral Student Researcher

Consent to Participate

I \_\_\_\_\_ (insert full name) agree to participate in the aforementioned research study. I understand that the data I have provided will be used for Astrid Kendrick's study, and that I can withdraw my data any time up until Astrid Kendrick has begun her data analysis (January, 2018).

Printed Name

Witness Printed Name

Signature:

Signature:

## Appendix B. Interview Protocol and Questions

### Template for Interview Protocol (Adapted from Creswell, 2015, p. 225).

Project: Astrid Kendrick Dissertation Interviews	Subject: The experience of emotional labor of educational actors engaged in implementing a reform initiative
Date of Interview:	Time of Interview:
Interviewer: Astrid Kendrick	Interviewee:
Position of Interviewee:	Pseudonym:

### Pre-interview Script

The purpose of this qualitative, hermeneutic phenomenological study is to explore the lived experience of a female, Albertan student, teacher, school leader, and system leader. The phenomenon under study is the lived experience of emotional labor while implementing a reform initiative from the *Inspiring Education* initiative. Specifically, the data that will be used will be a rich description of experiences of emotional labor during educational change that emerges from your lived experiences. The final report will be a collective rendering of a plausible experience, not a detailed account of your own experience with emotional labor during educational reform. You will be assigned a pseudonym that you can choose to be associated with the data that you provide to me to protect your privacy. This interview should take about sixty (60) minutes. If you still wish to participate, please sign this consent letter [pass to participant]. If you wish to drop out of the interview at any time, you are welcome to do so, and if you no longer wish to participate, you are free to drop out of the study before I begin my data analysis (January, 2018). Should we get started?

### Interview Questions (teacher/school leader/system leader)

- 
1. Let's start by looking at the document (*Framework for Teaching Excellence*) that I sent to you before the interview. Tell me about your experience with using this document.
  2. Tell me about your teaching/educational leadership career. Which experiences stand out for you as highlights?
  3. Which experiences stand out to you as low times?
  4. Describe your teaching/school leadership during these experiences. Where were you? What position did you hold? Which emotions do you associate with these times?
  5. Describe the emotions that you associate with teaching or school leadership.

6. Which emotions are appropriate to express in a school or professional setting?
7. Which emotions are not appropriate to express in a school or professional setting?
8. Describe a recent experience that you had with expressing or repressing emotions in a school or professional setting.
9. Describe your teaching career from 2009-2016. Where were you located? What role did you play in your school?
10. Describe your initial experiences with the *Inspiring Education* initiatives (2009-2012).
11. Describe your current experiences with the *Inspiring Education* initiatives (2012-2016).
12. What is your current emotional response to the *Inspiring Education* initiatives currently being implemented in your teaching/leadership practice?

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### Post-interview Script

Thank you so much for speaking to me today. I appreciated your openness to speak with me about your experiences in/at school. I would like to assure you that your responses will remain confidential and that I will provide opportunity for follow-up discussion. Also, if you wish to read the transcript of this interview to provide additional information and ensure accuracy of your experiences, I can provide a copy to you before I complete my data analysis in January, 2018. If you think of other experiences that you would like to discuss with me, please contact me! As noted earlier, the final report of my study will mirror and reflect your experiences, but it will not be a description of only your responses. The final write up will reflect a collaborated construction of the lived experiences of all my participants. I appreciate your time very much.

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**Appendix C: Facebook Post (Recruitment)**

Facebook Post (for private Facebook group (already a member) Alberta Teachers – Resource Sharing and Idea Group) to recruit possible participants.

Hello – I am a doctoral candidate from the University of Calgary, and I am doing a study for my dissertation on the lived experiences of a female student, teacher, principal/school leader, and system leader with emotional labor during educational change (specifically, you would have been teaching between 2009-2016 in Alberta). Please PM me if you might be interested in learning more information!

## Appendix D: Poster

## Inspiring Change: A Hermeneutic Phenomenological Study Exploring the Lived Experience with Emotional Labor of Female Health Champions While Implementing Educational Reform

Astrid Kendrick, Ed.D. Candidate, Werklund School of Education



UNIVERSITY OF  
CALGARY

### Research Study Abstract

This research study for a Doctorate of Education thesis will explore the lived experience of female educational actors (Health Champions) as they navigate through periods of flux and systemic instability caused by reform (Comprehensive School Health). The purpose of this hermeneutic phenomenological study is to discover the immediate emotional and embodied experiences identified by four individuals who have had multiple roles as a student, teacher, school leader, and system leader and have been implementing CSH projects between 2010 and 2016 in Alberta, Canada. I seek to uncover insights into their common understanding of emotional labor as this phenomenon emerges during the impact stage of implementing the CSH project. In completing this research, I aim to illuminate the importance of addressing educational actors' emotional work as they attempt to implement educational reform, as this phenomenon is understudied in educational contexts.

### Why Health Champions in Alberta?

In 2010, the document entitled *Inspiring Education: A Dialogue with Albertans* (Alberta Education) produced a new vision for the future of Alberta's educational system. At that same time, a new Wellness Framework following the Comprehensive School Health approach was introduced to reform the delivery of Physical Education in the province. Through the flux generated by new policies, conflicting documentation, and controversy, Health Champions have attempted to promote, understand, and implement educational reform with the intent of improving student wellbeing. As of the present, many of the reforms of *Inspiring Education* (2010), the Wellness Framework, and the CSH framework continue to be pursued in school settings.

As Health Champions have made sense of organizational change, they might have experienced emotional labor—a dissonance between the actual emotional response of an individual to an event and the surface, or acted, response (Hochschild, 2003). This study will focus on the experience of emotional labor by Health Champions to un-silence the role of emotion during reform efforts and illuminate the emotional complexities present in school organizations which are complex adaptive systems (Morrison, 2010).

### Participants – Health Champions

I am looking to interview Health Champions who are currently working to implement Comprehensive School Health reforms in their school. Specifically, I am hoping to speak with four female educators who have performed multiple roles within the Alberta Educational system (as pre-service teachers, system leaders, school administration, and/or teachers) for a 60-90 minute interview to discuss the emotional labor they experience as they work to implement educational reform.

Emotional labor is (in brief) the internal work that a person performs to either express or repress acceptable or unacceptable emotions while engaged in their normal work day. In the case of my study, I am hoping to describe the lived experience with emotional labor by female educators as they implement reforms, and the impact of emotional labor on the adoption or rejection of reform efforts. The role of emotions during reform is currently an area that is understudied in Educational contexts, and this study could provide insights into how emotional labor influences reform implementation and success.

### Participant Delimitations:

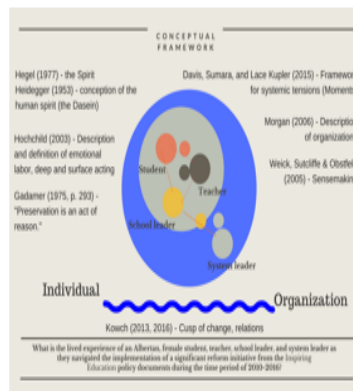
- Female Health Champion who has worked in the education field as a system leader, a principal, a teacher, and/or a student leader for eight or more years (2009 onwards).
- A Health Champion who is currently attempting to implement a project to improve student or staff health or wellbeing.
- A Health Champion who is willing to describe her lived experience with emotional labor while implementing reform.
- The benefit of participating in this study could be that in identifying the emotional experience of school personnel involved in implementing a reform initiative, I might generate more understanding of this phenomenon while promoting the emotional wellbeing of educational change agents (i.e. Health Champions).

This study has received CFREB (Ethics Board) approval and is supervised by Dr. Darren Lund (Professor, Werklund School of Education).

### School Leadership and Complex Adaptive Systems

Educational theorists have moved towards an understanding of human institutions as learning systems. This movement has re-imagined the school as a complex adaptive system that both changes and is changed by its individual members (Davis, Sumara & Luce-Kapler, 2014; Kowch, 2013). The introduction of change to one aspect of the system is likely to create disequilibrium (Morgan, 2006) – a state of uncertainty that prompts the members of the system to adapt to or reject the change to return to a state of equilibrium. Tracking emergence (Hazy & Uhl-Bien, 2013) of innovative phenomena in response to disequilibrium (Morgan, 2006) can become the focus for re-formation of a system; however, the role that emotional labor plays in the re-formation of the system is currently understudied.

Tracking the networked and dynamic interactions between institutional actors as they react to and implement reform is a necessary component to the overall smooth functioning of leadership in the system (Davis, Sumara & D'Amour, 2012; Kowch, 2013). Emotional labor, the change agent's expression or repression of organizationally acceptable emotion as they implement the reform, occurs within these dynamic interactions. Because surface acting (Hochschild, 2003) over a long period has been linked to emotional exhaustion in public service professionals (Yao et al, 2015), a description of this phenomenon could be a necessary component of improving reform success while protecting educator wellbeing.



**Appendix F: Code Table**

<b>Code</b>	<b>Participant comment or experience</b>
Framework for Teaching Excellence	Sunita – 15, 19, 20 Holly – 17-19 Irene – 17-22 Maui – 2-8 Phoebe – 13, 18-19
<b>Role</b>	
Role – external but involved in school system	Sunita – 22-30; 81; 87.5-91 Holly – 182 Maui - 12
Role – school-based Role	Holly – 23 Irene – 39-40; 47 Maui – 10; 15 Phoebe – 15-16
Role – system role	Irene – 45-46 Maui - 11
Role – student	Holly - 24
Role – Health Champion/Wellness Team	Holly – 24.5, 52-53; 56-57; 189-192; 251 Irene – 29-31; 107 Maui – 220-228 Phoebe – 151-159
Function of role	Sunita – 32-37, 42, 45 Holly – 81-83 Irene – 104; 106; 109-110 Maui – 53-54 Phoebe – 139-147 (leadership as function not role); 158, 160
<b>Deep Acting</b>	
Deep acting – Alignment of passion and role	Sunita – 39, 70 Holly – 29-31; 44; 84-87; 89; 170; 173; 179; 183; 340-342; 353; 355-357 Irene – 41-43; 49; 248 Maui – 15; 25-26; 29 Phoebe – 43-44; 49; 95-98; 345-
Deep acting – risk and reward	Holly - 330
Meaningful matching of system and school knowledge	Irene – 204-206 Maui – 28; 41-42; 70.5-72 Phoebe – 45-48; 51-52
Deep acting – heart work	Sunita – 77-78; 80 Irene – 66; 68; 72-73; 77 Maui – 23-24; 50.5-51; 339-340 Phoebe – 261-265
Deep acting – altruism	Sunita – 78; 82 Holly – 59; 184 Irene – 63.2; 74-75; 305-307; 311-312 Maui – 295-295.5; 335
Deep acting – loss/educational turbulence	Sunita – 65, 79 Maui – 45-50
Deep acting – loss	Sunita – 64 Holly – 147 Irene - 65, 67, 69;
<b>Fusion of Horizons</b>	
Historical Perspective – role	Sunita – 47 Holly – 164-169 Maui – 19.5-20; 246-250.5 Irene – 24-28
Historical Perspective	Sunita – 48-50 Holly – 181 Irene - 264
Historical perspective – momentum	Sunita – 51-52
Historical perspective – adoption	Sunita – 53, 54 Holly – 27; 175-178; 180; 200; 347 Irene – 249 Maui – 251-263 Phoebe – 53-55, 57-59; 134-136

Historical perspective – acceleration	Sunita – 58 Phoebe – 137
Change	
Implementation: Ambiguity	Holly – 206; 211-212 Maui – 58-59; 65-68; 73-75; 80 Phoebe – 321-322
Implementation: Role	Holly – 242-249 Irene – 51-52; 54; 325-330 Maui – 268-270 Phoebe – 104-109; 266-267
Implementation: Collaboration	Maui – 296-299 Phoebe – 248-260
Generative leadership	Holly – 208-209 Irene – 32-37; 105; 108; 275-283 Maui – 17-19; 21-22; 257-262 Phoebe – 100, 102; 260
Role distinction – teacher/leader (hierarchy)	Sunita – 139 Holly – 144 Irene – 56; 114; 216; 267; 324 Maui – 55, 57 Phoebe – 124-126, 128; 174-176
System Change Agent perspective (?) – “see change”	Sunita -- 92-94 Holly – 34-40; 43, 45-48 Irene – 63 Phoebe – 361-372
Change agent: vision	Holly – 331-334 Irene – 57-60; 223-224; 300-302; 304-305 Maui – 63-64; 105-107; 218-220; 264-267; 271; 362
Change Agent: creativity	Irene – 95-99; 262 Phoebe – 71-77
Change Agent: complexity of school emotions	Maui – 322-325; 356-
Change Agent: momentum	Phoebe – 132-133; 269-272
Seeking opportunities to enact change	Holly – 203 Irene – 63.1; 187-197; 198-203 Phoebe – 35-42 (experience); 171-173; 323-325; 327-333
Timing of Change/Time for Change	Irene – 87; 118-119; 207-209; 259-261 Phoebe – 66-69
Pace of Change	Holly – 202; 360-365; 368-371 Irene – 225-229; 251 Maui – 272-274; 282-287; 304; 363-364 Phoebe – 107
Work Intensification	
Work intensification	Sunita – 66 Irene – 111-112 Phoebe – 90-92
Work intensification – deep acting, strain	Sunita – 68 Holly – 359 Maui – 277-278
Work intensification – number of interactions	Irene – 163-170; 172- 175; 290-293; 297-299
Emotional labor relationship with work intensification	Sunita – 171, 179-182 Irene – 177-179
Funding -experience- educational turbulence	Sunita – 69; 70-71 Holly – 348-352 Irene – 76; 78-82; 84 Maui – 69-70
Expectations of Leadership	
Expectations of leadership (outward)	Sunita -- 84-87
Expectations of leadership: Openness to others	Sunita – 98 Holly – 88; 157-160; 162
Expectation of leadership: trustworthiness	Irene – 253-254
Expectation of leadership: Openness to change	Holly – 207; 214-215 Irene: 61-62

	Maui – 102; 153; 276 Phoebe – 161-163; 374-377 (to learning)
Expectation of leadership: collaboration	Holly – 80; 198; 204-205 Maui – 29.5-32; 99 Phoebe – 164-167, 170
Expectations of leadership: Hopeful	Sunita – 99 Holly - 210
Expectations of leadership: Persistent	Sunita – 100 Holly – 206 Maui – 140-142; 290-292, 294 Phoebe - 273
Expectations of leadership: Patience	Sunita – 103 Irene – 222; 255-258 Maui – 113-114
Expectations of leadership: Listening	Holly – 156; 174
Expectation of leadership: empathy	Holly – 300-301 Irene – 120 Maui – 82-86
Expectation of leadership: intuition	Irene – 113; 121 Maui - 108
Expectation of leadership: take burden from staff	Holly – 302-306 Maui – 38; 90-93; 103-104; 137-139; 143-145
Expectation of leadership: take risks	Holly – 309-323; 325-326; 329; 337-339 Maui – 36 Phoebe – 275-277; 337-341
<b>Expectations of Teachers</b>	
Expectations of teachers: connected to students	Holly – 265-272; 299 Irene – 88-89; 100-101; 115-116 Maui – 240; 313 Phoebe – 25-29; 225; 232-241 (difficult connections)
Academic Job expectations	Maui – 348-349
Expectation of teachers: take on emotional burden from students	Holly – 278-281; 295-297
<b>Expectations of School Administration</b>	
Expectation of admin: Gatekeeper	Maui – 111; 136; 270
Expectation of admin: connect to staff	Maui – 241-245; 309-312, 314
Use of role to hire like-minded staff	Maui – 237-239
<b>Emotional Expression and Regulation/Emotional Labor as Teachable Moments</b>	
Expression of range of emotions	Sunita – 105-107, 114-115 Irene – 123, 127 Maui – 87-88; 89-89.5; 163-173; 187-195 (key experience); 332-333 Phoebe – 180-182
Re-booting through genuine emotional expression	Maui – 341-346
<b>Emotional Labor: Managed Emotions</b>	
Emotional labor: Managed emotions	Sunita – 108-109 Irene – 86; (experience/metaphor) 137-138; 149-153 Maui – 94; 174-175; 306
Emotional labor: Managed emotions regarding role	Sunita – 110-111.5, 116-120 Holly – 71; 91-95; 117-122; 130; 133; 154 Irene – 130; 133-135 Maui – 95; 98; 117-129, 133-135
Emotional labor: Managed emotions Vulnerability	Sunita – 121 Holly – 276 Irene – 124 Maui – 88.5; 100-101; 336 Phoebe - 186
Emotional labor: Managed emotions Anger/conflict	Sunita – 122 Holly – 96; 132 Irene – 125-126; 129-130 Maui – 160; 197-199 Phoebe – 200-210 (as teaching moment); 212-223



Emotional labor: Managed emotions Frustration	Sunita – 123 Holly – 74; 138-139.5; 146; 147 Irene – 132 Maui – 280-281; 306.5-308 Phoebe – 122-123; 190-194 (as teaching moment)
Emotional labor: Managed emotions Anxiety	Maui - 159
Emotional labor: Managed emotions Sadness	Sunita – 124 Holly – 132 Maui – 157 Phoebe – 195-198
Emotional labor: Expression of managed emotions Positive	Sunita – 125-126 Holly – 124-127; 277 Maui – 148-150; 152; 158
Emotional labor: Expression of managed emotions Calm	Sunita – 127-128, 154-156 Holly – 73; 76; 79; 97-99; 101-106 Irene – 157-158 Maui – 154-156 Phoebe – 226-227
Emotional labor experience: knowledge/vulnerability	Sunita – 130-134 Phoebe – 115-120
Emotional labor experience: knowledge “getting it right”	Holly – 193-196; 199; 201; 226-240 Irene – 321 Maui – 301-303; 334
Emotional labor experience: knowledge “getting it done”	Maui – 34; 130-131; 232-234 Phoebe – 111-114
Inner Coach	
Emotional labor: inner coach/voice	Sunita – 135-136; 156-157 Holly – 69; 75; 110; 140; 345-346 Maui – 331; 350-352 Phoebe – 227-231; 285-290, 292, 293
Emotional Labor Experiences	
Emotional labor experience: policy development (deep acting) and leadership expectation (outward calm, inward turmoil)	Sunita – 141-148 Holly – 335-336
Emotional Labor experience: Protecting Staff	Maui -183-186
Emotional labor experience: Empathy, reading the pulse	Sunita – 150, 152-153 Holly – 275
Emotional Labor Experience: Repressing Anger	Maui – 176-181
After emotional labor: introspection	Sunita – 151, 158-159 Holly – 64-67; 72
After emotional labor: feedforward experience	Sunita – 163-168 Holly – 148-153 Irene – 233-246 Maui – 201-205, 207-213 Phoebe - 320
Problem-solving	Holly – 288 Phoebe – 61-64
Exhaustion	Holly – 58; 62; 68; 141 Irene – 38; 93; 159-161; 250; 284; 303
Emotional labor: Job expectations and personality (introversion)	Sunita – 174-176; 183-188
Safe Spaces	
Emotional labor: Post experience safe places	Sunita -77-178 Irene – 143-147; 294 Maui – 199.25 Phoebe – 303-307; 309-315

Safe Places for genuine Emotional expression	Holly – 123; 127-129; 134-136; 142-143; 161; 283-284; 289-294 Irene - 139 Maui – 199.5-200; 216; 229-231; 315-320 (with students); 337-339 Phoebe – 183-184 (with students); 188
Safe Spaces: Professional growth	Phoebe – 295, 297, 299
Safe Space: professional trust	Maui – 39-40; 112
Safe spaces: non-judgmental	Holly – 285-287; 307; 366-367 Maui - 27
<b>Emotional Labor and Change Agent (Health Champion)</b>	
Emotional Labor related to being a Change Agent/Health Champion (social disconnect)	Holly – 51; 54
Emotional Labor related to being a Change Agent/Health Champion – family disconnect	Holly – 55 Irene – 90-92; 94; 285-288; 313
Mother	Holly – 327 Maui – 13; 35; 56; 60-62; 76-79; 150; 206; 330; 353-355 Phoebe - 290
Emotional Labor related to being a Change Agent/Health Champion: Convincing others	Holly – 216-224; 251-254 Maui – 275; 288-289
Emotional Labor related to being a Change Agent/Health Champion: Impact on others	Holly – 255-256 Irene – 210-216; 322 Maui – 27-27.5; 326-328 Phoebe – 80-86; 93-94; 149
Emotional Labor related to being a Change Agent/Health Champion: Recognition	Irene – 268-274; 309 Maui – 33 Phoebe – 60; 78-79; 80-84

## Appendix F: Data Analysis Photos

