

Perspectives and practices on commercialism in education: A study of  
school administrators in Montreal

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## DEDICATION

This document is dedicated to my family, friends and colleagues. Thank you for your continued support, throughout the many adventures, which has formed my educational career.

This document is also dedicated to the next generation of illuminated minds. May education serve you, as it has me, opening doors, freeing minds and lifting spirits.

*“On the importance of education... it is as necessary as the light  
– it should be as common as water and as free as air”*

- Egerton Ryerson

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## TABLE OF CONTENTS

DEDICATION .....	ii
ACKNOWLEDGMENTS .....	iii
TABLE OF CONTENTS.....	iv
LIST OF TABLES.....	vii
LIST OF FIGURES .....	viii
Introduction .....	1
Statement of the Problem .....	1
Statement of the Research Question .....	2
Statement of the Research Design .....	2
Overview of the Thesis .....	3
Situating the Researcher.....	4
Chapter One: Literature Review .....	6
Introduction.....	6
Ethical Leadership and School Finance .....	6
Campbell’s Labels for Education.....	7
Onestop Media Group Expansion .....	8
Identifications of Commercial Practices in Education.....	9
Rationales for Commercial Practices in Education.....	11
Outcomes of Commercial Practices in Education.....	15
Commercial Policies across Canada .....	19
Conclusion .....	24
Chapter Two: Methodology .....	25
Introduction.....	25
Qualitative Research Design.....	25
Grounded Theory .....	27
Connecting with Qualitative Inquiry.....	28
Data Collection .....	29
Locating the Site or Individual .....	30

Gaining Access and Making Rapport .....	30
Purposefully Sampling .....	31
Collecting Data, Recording Information and Storing Data.....	32
Credibility, Transferability, Dependability and Confirmability.....	33
Truth Value (Credibility) .....	34
Applicability (Transferability).....	35
Consistency (Dependability) .....	36
Neutrality (Confirmability) .....	36
Conclusion .....	37
Chapter Three: Exploring Coding, Emerging Themes & Building a Theory .....	38
Introduction.....	38
Data Analysis – The Constant Comparative Approach .....	38
Exploring Participant Themes.....	41
Increasing Societal and Systemic Expectations .....	41
Student Supports .....	43
Extra- and Co-curricular Programming.....	44
Student Athletics.....	45
Beyond the Role .....	46
Commercial Practices in Montreal Schools.....	47
Fundraising .....	49
Sponsorships .....	50
Exclusive Agreements .....	52
Appropriation of Space.....	53
Digital Marketing.....	54
The Importance of the Ethical Educational Leadership .....	55
Essential Knowledge and Commercial Practices.....	56
Professional Commercial Skills in Education .....	57
Personal Attributes of Ethical Commercial Practices.....	60
Conclusion .....	61
Conclusions .....	63

A Conceptual Model of the Integration of Categories.....	63
Limitations of the Study.....	66
The Use of Self-Reported Data.....	67
Cultural and Language Biases .....	67
Implications.....	68
The Canadian Commercialism in Education Field .....	68
Educational Leadership .....	69
Educational Governance.....	70
Appendices A: Ethics.....	71
Appendices B: Informed Consent Form.....	73
Appendices C: Participant Interview Protocol .....	76
Appendices D: Summary Table of Commercial Practices in Education.....	77
Appendices E: Conceptualization of Coding Progression .....	79
References .....	84

## LIST OF TABLES

Table 1: Provides a summary of the rationales for the allowance or seeking of commercial practices by educational systems and its leaderships. ....	13
Table 2: Provides a summary of the rationales for the seeking of commercial practices in education by external organizations and/or business. ....	15
Table 3: Table of eight commercial practices in education (Molnar & Morales, 2000, pp. 3-4). ....	78
Table 4: Provides a conceptualization of coding progression through initial coding, axial coding, and emerging themes. ....	83

## LIST OF FIGURES

Figure 1: Theory Generation – Developing Educational Commercial Practices.....	63
Figure 2: Certificate of Ethical Acceptability of Research Involving Humans.....	71
Figure 3: Renewal Certificate of Ethical Acceptability of Research Involving Humans .....	72
Figure 4: Informed Consent Form for Participants (1 of 3) .....	73
Figure 5: Informed Consent Form for Participants (2 of 3) .....	74
Figure 6: Informed Consent Form for Participants (3 of 3) .....	75
Figure 7: Evolving Interview Guide .....	76

## ABSTRACT

Public education in Canada is currently undergoing a period of financial restraint and fiscal reform. In spite of these restraints, schools are still mandated to provide diverse educational services, such as academic support and extensive extra- and co-curricular activities. This is placing school administration in the challenging position of funding these programs while balancing school budgets. This qualitative study, conducted with the grounded theory methodology, examined the commercial practices and perspectives of Montreal school administrators. Although there is an abundance of theoretical literature on commercialism in education, very few studies have examined these practices from the perspective of the administrators themselves. The study focuses on the importance of ethical educational leadership in light of seven commercial practices: fundraising, sponsorship of school programs, exclusive agreements, sponsorship of incentive programs, appropriation of space, sponsorship of supplementary educational materials, and digital marketing. The findings suggest that current fiscal landscapes combined with budgetary restrictions and increased educational needs and expectations, pressures school administrators to actively seek out additional funding through commercial practices. When school administrators are faced with these restrictions and expectations they initiate a process of deliberation which takes into account complex ethical considerations. Administrators tend to rely on their personal values and past-experiences to establish good-judgement in their decision making process.

## RÉSUMÉ

L'éducation publique au Canada connaît actuellement une période de restrictions financières et budgétaires. En dépit de ces restrictions, les écoles ont pour mandat de fournir aux élèves des services éducatifs diversifiés, tels que le soutien scolaire ainsi que de nombreuses activités parascolaires. Cette situation représente des défis importants pour les administrateurs scolaires. Ils doivent trouver le moyen d'offrir les services exigés tout en équilibrant les budgets des écoles. Cette étude qualitative, menée avec la méthodologie de la théorie ancrée (grounded theory), a examiné les pratiques commerciales d'administrateurs scolaires de Montréal ainsi que leurs perspectives sur ces pratiques. Bien qu'il existe une abondante littérature théorique sur la commercialisation de l'éducation, très peu d'études portent sur les défis et les pratiques des administrateurs eux-mêmes. Cette étude met l'accent sur l'importance du leadership éducatif éthique à la lumière de sept pratiques commerciales: les collectes de fonds, les accords exclusifs, l'appropriation de l'espace, ainsi que le parrainage des programmes scolaires, des programmes d'incitation, de matériel didactique supplémentaire et de marketing numérique. Les résultats de l'étude démontrent que les administrateurs interrogés recherchent activement des fonds supplémentaires par la voie de pratiques commerciales pour combler les besoins éducatifs de l'école. Lorsque les administrateurs sont confrontés à des restrictions budgétaires importantes, ils initient un processus de délibération qui tient compte de considérations éthiques complexes. Les administrateurs ont tendance à se référer à leurs valeurs personnelles ainsi qu'à leurs expériences antérieures dans leur processus de prise de décision.

# Introduction

## Statement of the Problem

As the global and Canadian economies continue to evolve, governing bodies are responding with fiscal restraints and careful spending. This is being observed in the Canadian public school systems as tightening of budgets and reform. Schools and educational leaders are continuing to provide diverse educational programs; however are faced with the difficult task of funding these programs, allocating the necessary resources and balancing school budgets. To accomplish this, school administrators sometime require involving external partners or separate funding sources. These “*equalizing situations*” are leaving educational systems vulnerable to commercial influence.

The purpose of this study is therefore to identify, if any, the perspectives and practices of school administrators regarding commercial practices in Montreal educational systems. Although substantial literature on commercialism in education can be found, seldom do we hear from those key individuals who are called to make decisions about commercial practices, the “gatekeepers.” The subsequent findings of the study can then offer guidance towards the creation of suitable proactive policy for schools, governing boards and ministerial leaderships.

Previously published research regarding commercial practices in education are primarily quantitative by design and focus on the identification and statistical frequency of commercial practices rather than administrative perspectives or practices (Froese-Germain, Hawkey, Larose, McAdie, & Shaker, 2006; Molnar, Boninger, & Fogarty, 2011). Although successful in their own right, these studies lacked the valuable qualitative features such as the rich descriptions of lived experiences, the importance of context and meaning, and the analysis of multiple perspectives of school financial management. Moreover, this study’s qualitative design accedes to the inclusion of school administrator participants as co-researchers throughout the inquiry. This not only enhances the validity of the data collection procedure but also provides an introspective opportunity for their own professional growth.

## **Statement of the Research Question**

I begin this study without a concluding theory in mind; instead I remain open to discover from the perspectives and practices of my participants. Through this, we will engage in introspective and reflective conversations around the essential question of this study “Are there commercial opportunities and practices in Montreal schools and if so, what are the perspectives and practices of school administrators regarding them?” With a population of 3.8 million people, the second largest economy in Canada, and 53% of Quebec’s gross domestic product (Cousineau, 2014), it seems feasible that with such a prominent economic and consumer environment, that commercial practices might be occurring in Montreal schools. To further help in this inquiry, aiding subquestions (listed below) will identify and contextualization any such discovery:

1. Can you speak to the financial situations Montreal schools are currently in?
2. Are there commercial practices in Montreal schools? If so, what types of activities are taking place?
3. How significant an issue is commercialism in schools?
4. How do school administrators, within their autonomy, make financial management decisions?
5. What philosophical foundations do school administrators carry within their educational leaderships?

Elaborated further in the methodology chapter, these questions remain as a guide, open-ended and will help focus the study.

## **Statement of the Research Design**

As the study explores individual perspectives and how they affect educational systems, grounded theory methodology was chosen within a sociology of education theoretical framework (Scott & Marshall, 2009). The intent of grounded theory is to move beyond description and to generate or discover a theory. It will create an abstract analytical representation of a phenomenon and ground situational connections through the rich lived experiences and perspectives (Creswell, 2012). Thus grounded theory methodology is, within this study, examining the commercial practices and perspectives of school administrators in Montreal

schools. Using a constructivist approach (incorporating interpretivist theory), these perspectives and practices were accordingly, analyzed. Constructivism, is to, as articulated by Charmaz (2005), focus on the meanings endorsed by the participants in the study. Thus, framing this study within sociology, using grounded theory methodology and analyzing data through a constructivist approach, allows for a theory generation of school administrator perspectives and practices regarding commercial opportunities which highlights and values situational contexts and meanings.

### **Overview of the Thesis**

The format for this inquiry was framed within a traditional qualitative Master's thesis comprised of progressing chapters including an introduction, a review of relevant literature, the research methodology, data analysis and the study's conclusions.

- I. Chapter One – Literature Review: This chapter establishes a more in-depth foundation of commercialism in education. A review of relevant published literature was completed with major points of inquiry including ethical educational leadership and school finance, identification of commercial practices, rationales and outcomes and lastly, public policy and commercial governance.
- II. Chapter Two – Methodology: This chapter accounts for the study's qualitative research design, including specific characteristics and the appropriateness of the qualitative approach and grounded theory methodology. It also further situates my experience as a qualitative researcher by examining my own connection to positivist views and the qualitative inquiry process.
- III. Chapter Three - Exploring Coding, Building a Theory and Exploring Participant Themes: This chapter expands on the data analysis approach used, the constant comparative analysis. It includes a sequential look at coding progressions, rationales and the emergence of themes including “increasing societal and systemic expectations,” “commercial practices in Montreal schools,” and “the importance of the ethical educational leader.”
- IV. The conclusion provides an overview of theory generation, its conceptual schema of the findings, reflects on its limitations and proposes implications for relevant stakeholders and future research.

## **Situating the Researcher**

After taking my first post in educational leadership as an Assistant Principal, my interest in commercial practices in education developed quickly. Like many first time administrators, my first few months were a busy time. Evolving from a classroom teacher, learning new responsibilities and uncovering its roles, placed me on a steep, but very worthwhile, learning curve. As the school year progressed, I was readily surprised with how much mail, phone calls and faxes, the school and its leadership received from outside organizations, business, and associations looking to sell, become involved or put on events for our students. It was something as a classroom teacher, I had never considered, especially in this frequency.

My experienced mentor, colleague and principal seemed at ease with it all, a sort of business as usual. Following her lead, we engaged in meaningful conversations regarding some requests, meanwhile filed others quickly in the recycling bin. Over the course of the next two years, many requests were granted, others refused or ignored. Of these, one stood out more prominently, which I share below.

As a northern community with ties to diamond mining, our school was positioned to receive \$50,000 from a local diamond mine company through an impact benefit agreement. The funds were to be spent enriching the cultural programming for our students. After consultations with various stakeholders, we decided as a leadership, to invest the funds into building a new culture cabin. To receive the funding, no major school requirements were asked; only a small recognition of the mining company's contribution on the building or sign. After a few more consultations, progress advanced quickly, estimates and agreements were created and signed; construction began.

As an Assistant Principal, student success and wellbeing was a foundation always on my mind; it was a necessity of the position. In reflecting on the example above, I wrestled with how this "student success and wellbeing" would be portrayed, would this new culture cabin be worthwhile? Theoretically, with the diamond mine sponsorship, our students were going to receive a material resource which would enrich their educational experience. That was our intention. In looking back, I believe it was a decision grounded in the best interest of our students. However, I wonder if I did not fall into some form of indoctrination. Why did the diamond mine request that their name be posted on the school building or sign? From an

educational perspective, was this an acceptable request? What were their intentions and motivations? Did the outcome justify the means? It is through this experience that I began reflecting more deeply on educational leadership issues in school commercialism.

## Chapter One: Literature Review

### Introduction

This chapter will review contemporary literature on commercialism in education by focusing on the following themes: the commercial ethical leadership of school administrators, the classification of commercial practices, the rationales for the commercial emergence, the respected outcomes of commercial practices and the current public policy landscapes for its governance. To begin, I will discuss research relating to ethical educational leadership and its relationship to school finance.

### Ethical Leadership and School Finance

School finance is a very unique and contextual activity. Although it is done in every school across Canada, specific details are fluid and extremely localized. The priorities of one school rarely mirror that of another. These localized situations create ethically challenging decisions for leaderships which affect students, families and communities very close to home. More so, the real challenge faced by school administrators is to make ethically appropriate decisions, rather than expedient ones.

*“The truly swampy problems most frequently encountered by school leaders concern the design of effective strategies for realizing values to which they and most other stakeholders in the school adhere (e.g., equity) and to do so in the uncertain, interpersonally intense and resource-constrained environments which characterize today’s schools” (Leithwood, 1999, p. 26)*

Ethical educational leadership may be thought of as a school leader’s conscious account and utilization of individual and organizational values within their vision and decision making processes. *“School administrators have a special responsibility to be deliberately moral in their conduct, that is, to consider the value premises underlying their actions and decisions”* to further *“most of the principal’s authority is moral... teachers must be convinced that the principal’s point of view reflects the values they support”* (Greenfield, 1991, p. 18; 1995, p. 69). In addition, some view educators as requiring an even higher degree of moral responsibility within a community. *“As employees of public schools, administrators and teachers have responsibilities with regard to public values that go beyond what is expected of other citizens.*

*As public employees, they are entrusted to enforce public values and to an extent not necessary for private citizens, to observe those values in their work”* (McCarthy, 2008). Although, the depth of ethical leadership has and might be debated, it is highly improbable, that anyone would suggest school administrators not be ethical leaders. For better, this responsibility of ethical leadership is generally pre-internalized by administrators. Most are former teachers, whom themselves find professional satisfaction in contributing to the intellectual, emotional, and social well-being of their students, and thus have similar moral and ethical foundations.

The frequency at which ethically challenging situations present themselves for school administrators can be exhausting. Greenfield (1991) writes that “*principals experience ethical dilemmas on a daily basis (p. 2)*” while Foster (1986) furthers that each administrative decision has an impact on human life and thus is a moral resolution by nature. In the present context, for administrators, when confronted with fiscal desperation or resource constraints, ethically challenging dilemmas are further amplified and arduous. Administrators must weigh organizational benefits, indirect, subjective or obscure harm to students and the abilities, competencies and capacities of the school and personnel to remain effective. To exemplify these complex deliberations consider the following two case studies.

### **Campbell’s Labels for Education**

Since 1973, Campbell’s Labels for Education has a long standing history providing school supports both in the United States and Canada. It offers registered schools or institutions the opportunity to collect labels from Campbell’s products and redeem them for educational resources ranging from sports, music, video, and computer equipment. Individual Campbell’s labels or case UPCs from Foodservice Products at school cafeterias can be collected and redeemed for rewards. Schools should encourage parents and neighbors to purchase Campbell’s products to ensure that the appropriate labels can be collected and redeemed for school merchandise. “*Since 1998, Campbell’s has helped provide school equipment for...school. The students benefit more each year as they eagerly canvas their community for extra labels...excite teachers and parents about class competitions. Parental involvement is critical*” (“Campbell’s Labels for Education,” 2014).

## **Onestop Media Group Expansion**

The Toronto District School Board (TDSB) debated the expansion of a pilot project involving Onestop Media Group from four to seventy schools. Onestop Media Group is proposing placing LCD television monitors in the TDSB's schools, similar to those found at subway and airport terminals. Onestop Media Group would cover all costs associated with installations and equipment. In the proposal, television content would include student-generated videos and school news; meanwhile thirty percent would also be allocated for advertising under the management of the TDSB. Ads would include pro-social messages such as non-smoking, Milk Marketing Board content and information about post-secondary schools. In exchange for granting Onestop Media the rights to install the monitors, the board would receive \$1,300 for each participating school equalling \$91,000 per year (Connor, 2011).

Willower (1996) highlights the importance of differentiating between individual, organizational and instrumental values in examining the above case studies. Individual values are those expressed and held by the individual administrator, organizational values are a collective set of values shared amongst a school community, and instrumental values are the judgements, strategies, and practices used for successful implementation of ethically desirable aims (Willower, 1996). Thus the challenge proposed to administrators is not only in their ability to identify and contextualize values at play (including their own) but to also find an ethically appropriate course of action. In the noted case studies above, this would involve determining the motivations and values for all the stakeholders involved, Campbell's, OneStop Media, the school leadership and the school community. This would then be followed by determining an appropriate course of action. This demanding task becomes even more complex when the ethical dilemma, such as a potential commercial opportunity or practice conflicts with the personal values of the administrator, the organizational values of the school or values held by the local school community.

It remains, that within effective ethical educational leadership, it is one thing to individually know what is "right" and "wrong" quite another, to take the required action to ensure a practice or decision is ethically desirable. It is within this requirement of action that brings an administrator's ethical leadership beyond simply caring and altruism alone. *"Most educators are principled individuals who want the best for their students. Caring and altruism*

*are not nearly so problematic as is the ability to make judgements about how to complete the successful implementation of ethically desirable aims”* (Willower, 1996, p. 359). In this action, administrators are urged to use a ‘moral valuation’ process. Defined as the application of the methods of inquiry to moral problems, moral valuation is a sequential activity, recognizing contexts, elaborating on alternatives and consequences, and framing a course of action (Willower, 1999). Although conceding uncertainty and fallibility, the moral valuation process also recognizes the context that a school administrator’s deliberation cannot be endless and in the end, a moral choice has to be made.

In making moral choices, Starratt (1991) suggested “the multidimensional ethic” as a guide for ethical decision making in school environments. In this, three ethical theories were described: -the ethic of critique, -the ethic of care, and -the ethic of justice. The ethic of critique centralizes around critical theory whereby social justice and human rights would be contemplated in an administrator’s decision making. Within the ethic of justice, school administrators would consider the application of current laws, policies and their respective course of actions. And lastly, according to the ethic of care, an administrator would consider social relationships and the consequences of their actions on individuals and the community (Sprouse, 2009). Extended later by Shapiro and Stefkovich (2001), Starratt’s three elements of multidimensional ethics added a fourth ethic, -the ethic of the profession. In this, an administrator would also consider what the profession would expect and what is in the best interest of students.

Regardless of the ethical decision making model a school administrator embodies, it is clear that commercialism, education and the ethical decision making process form a complex and multifaceted relationship. As Shapiro and Stefkovich (2001); Sprouse (2009) write *“administrators must be self-aware and reflect upon concepts such as what they perceive to be right or wrong and good or bad, who they are as professionals and as human beings, how they make decisions, and why they make the decisions they do* (pp. 16, 21).”

### **Identifications of Commercial Practices in Education**

As previously identified, it is critical that educational leaders have the introspective competencies to identify, analyse and reflect on commercial practices and their influences on today’s educational systems. In order to do so, these leaders, most likely school administrators

and/or governing board members, must have a clear understanding as to what constitutes a commercial practice and its historical contexts for which they have emerged. Alex Molnar has looked at commercial practices in education over the past thirty years. He has found that these practices take three basic forms “*the selling to (retailing), the selling in (promotion and public relations), and the selling of schools and education (privatizations)*” (2005, p. 7).

Molnar notes that selling to schools has been a longstanding practice and is relatively unproblematic. Within their daily operations, schools consume resources and in turn, school leaderships are required to purchase resources. Over the years, a multitude of products have been sold to schools including textbooks, office supplies, electronics, maintenance and food services. This is a straight-forward commercial practice with deciding authority remaining within school administration.

Secondly, the selling in schools encompasses the use of schools by corporations and organizations to sell products or services, to promote messages or address public relations or political problems. Unlike selling to schools, selling in schools has drawn considerable attention over recent decades and has remained at the forefront of much sustained concern.

Lastly, the selling of schools and education is a relatively new educational trend, in comparison to the establishment of public education, and is viewed as the creation of private schools or the management of public schools by private companies. Molnar (2005) concedes, reform in educational policies over the last twenty five years have fostered movements in favor of the privatization of public education. Solicitations by social, political and economic forces have lead to this relatively new mind-frame and acceptance, thus laying reason for its expansions and prevalence.

Although Quebec has a considerable history with privatizations and private schools, its governance, reforms and policies are beyond the responsibilities of the school administrators’ central to this study. Notwithstanding, engagements in the selling to and the selling in schools are very much responsibilities within their respective portfolios and thus for the purpose of this study, will be the fundamental themes of inquiry.

Keeping these distinctions in mind, Molnar (2000) has identified eight overlapping commercial practices in education. They include: sponsorship of school programs; exclusive agreements; sponsorship of incentive programs; appropriation of space on school property;

sponsorship of supplementary educational materials; fundraising; privatization (excluded) and digital marketing. Appendix D provides a summary table of Molnar's eight overlapping commercial practices including definition and examples.

### **Rationales for Commercial Practices in Education**

It is important to understand the historical context which gave rise to these commercial practices in education. Although unique circumstances can trace back historical accounts of commercial practices throughout many decades, commercialism in education is considered by most as a recent trend in our Canadian educational systems. According to Ascher (1988), there has only been notable continued commercial presence in education since the 1980s. It was during this decade that a new educational trend consisting of continued private sector involvement in public education was steadily seen and documented (Ascher, 1988).

According to consumer theorist Aldridge (2003) and Bocock (1993), societal consumerism experienced a significant surge and shift during the twentieth century, notably the latter half. During this period, economies of the Western world underwent a transformation from an economy based on production to an economy based on consumption. This revolution radically altered value foundations and prioritized the value of consumer products and their corresponding meanings and messages (Norris, 2011). This changed an entire way of life now focused on the self and to the consumption. As a momentous and profound moment in societal history, with continued boosts from multinational corporations and the globalization of the international trade, it has remained the central focus to our modern way of life.

Equally as significant to a societal shift to consumerism, was the remarkable change to the lifestyles of children and/or play (a central focus amongst children). At the beginning of the twentieth century, play was an open-ended imaginative exploration of the ordinary. *"A century ago, children often opted to play with everyday objects or found items – anything could be a plaything, and it often was... Parents were far more willing to let their kids explore city streets, vacant lots, forests, and other neighborhoods on their own"* (Doerfler, 2013, pp. 1,2). This fostered youth to imagine their own games, create their own rules and develop their own toys. In stark contrast, at the end century, children predominately engaged with electronic toys, media and/or video games; spending notable time in-doors, watching television, and manipulating electronic gadgets. These forms of play are closed-ended, pre-programmed and require

diminished imagination in direction. When children have attained the pre-determined goals, play is over, becomes uninteresting and the toy is disposed (Doerfler, 2013). Playtime as a result evolved to a consumable activity, requiring replacements and/or add-ons.

As a result, children became official consumers for their play and accordingly surfaced as a significant spending power and an emerging marketable age-group. *“In the United States, annual corporate spending on marketing to kids has grown substantially, from \$100 million in 1983 to \$15 billion (US) currently”* (Schor, 2004). This is not uniquely American with Canadian youth exhibiting similar traits. *“According to the 2005 YTV Tween Report, Canadian kids aged 9 to 14 spent \$2.9 billion of their own money (up from \$1.1 billion in 1995), and influenced at least \$20 billion in purchases by their parents”*(Froese-Germain et al., 2006).

Hence, it appears changes in both economics and in the lifestyles of children contributed significantly to the development of consumer based values in society. In this, we also see the emergence and the continued pressure of commercial influence in education. In what follows, I will examine the rationales for consumer presence in education.

<b>Rationales for Commercial Practices in Education by Educational Systems</b>	
<b>Educational Stakeholders</b>	<b>Rationales</b>
<i>Administration</i>	<ul style="list-style-type: none"> <li>• Fiscal desperation which can be immediately remedied by monetary contribution.</li> </ul>
<i>Administration, Staff, Students</i>	<ul style="list-style-type: none"> <li>• Resource deprivation (human or material) which is alleviated by corporate development or supply of educational resources.</li> </ul>
<i>Society, Administration, Staff</i>	<ul style="list-style-type: none"> <li>• An increasingly prevalent agreement (whether factually or artificial) between educators and the public, that improvements are required to successfully educate students in the ever-complicating and changing society (Ascher, 1988; Robertson, 1998).</li> </ul>
<i>Administration, Society, School Board</i>	<ul style="list-style-type: none"> <li>• The successful implementations of educational reforms. Schools systems cannot accomplished omnibus educational reform without involving other societal stakeholders such as colleges, corporations, communities, and government (Gross, 1988)</li> </ul>
<i>School Board, Administration</i>	<ul style="list-style-type: none"> <li>• The historical curricular neglect of specific programs and activities such as Art education. According to Chapman (1982), art programs are typically the first programs to experience budgetary cuts or reform. Schools often opt to “hire” contractual artist or services instead of maintaining a full arts program.</li> </ul>

<b>Rationales for Commercial Practices in Education by Educational Systems</b>	
<b>Educational Stakeholders</b>	<b>Rationales</b>
<i>Students, Society</i>	<ul style="list-style-type: none"> <li>Partnerships aimed at bridging networking gaps between students and potential future employers (Farrar &amp; Cipollone, 1988).</li> </ul>
<i>Various</i>	<ul style="list-style-type: none"> <li>Internal pressure by students, staff, or other educational bodies with their own specific agendas. The Canadian educational systems are themselves organic and evolve. In this, they too can succumb to the societal pressures and influences. There is not one example throughout the history of Canadian education, where a significant American educational trend was completely passed over (Robertson, 1998).</li> </ul>

Table 1: Provides a summary of the rationales for the allowance or seeking of commercial practices by educational systems and its leaderships.

The above listing is by no means an all account of rationales for educational involvement in commercial practices. The list of educational stakeholders to whom educational leaderships are accountable to, is long and diverse: students, parents, staff, boards, ministries, communities, municipalities, societies. Any of these stakeholders could make a claim or motion to a school or governing board and initiate participation or an engagement in a commercial practice.

Equally as important are secondary rationales by external organizations and/or business.

<b>Rationales for Commercial Practices in Education by External Organizations</b>	
<b>Theme</b>	<b>Rationales</b>
<i>Public Relations</i>	<ul style="list-style-type: none"> <li>Pro-social message delivery to achieve socially responsible mandates or missions. Organizations (including governments and charities) may seek partnerships with schools to attain ethically sound organizational goals such as physical fitness, inclusiveness, tolerance, anti-bullying, fire-prevention awareness, environmentalism and personal safety (Robertson, 1998).</li> </ul>
<i>Opportunity for Profit</i>	<ul style="list-style-type: none"> <li>Direct opportunity for profit or promotion whereby profit seeking corporations or organizations engage in commercial practices of management, offering products and/or services (Kenway &amp; Bullen, 2001; Mickelson, 1999; Norris, 2011). Today's Canadian youth have a large and relatively unsupervised purchasing power. Children in the educational system are thus viewed as a large, newly emerging market</li> </ul>

Rationales for Commercial Practices in Education by External Organizations	
Theme	Rationales
	with considerable potential for profit retentions (Kenway & Bullen, 2001).
<i>Corporate Benevolence</i>	<ul style="list-style-type: none"> <li>• Corporate benevolence; a partnership with schools and education improves the appearance of community goodwill, adds regional legitimacy and is a strategic marketing goal of organizations. Lines become blurred and distinction between corporate benevolence and strategic philanthropy is difficult (Norris, 2011).</li> <li>• Specific organizational actions have been identified by Timpane and McNeil (1991) and Mickelson (1999):             <ol style="list-style-type: none"> <li>a. Helping hand relationships whereby money, equipment, tutors, or community speakers are given to the school with no expected returns;                 <ol style="list-style-type: none"> <li>i. Large independent educational foundations motivated by altruism.</li> <li>ii. The donation of corporate resources (including human) motivated by self-interest, career advancement and symbolic values.</li> <li>iii. Donation of volunteer hours by employees to serve as tutors, mentors and supports, motivated by a personal dedication to children.</li> </ol> </li> <li>b. Programmatic support set up by businesses such as professional development and career preparation;                 <ol style="list-style-type: none"> <li>i. Involvement of business as educational decision makers supporting the diversification of educational leadership skillsets.</li> <li>ii. Monitoring student achievement to ensure a highly educated and skilled employable labour pool and workforce (Ascher, 1988).</li> </ol> </li> </ol> </li> </ul>
<i>Internalization of Messages and Behaviors</i>	<ul style="list-style-type: none"> <li>• Schools are sites where values and ideologies are taught and internalized. Students develop and refine their behaviors and messages which potentially may last throughout their lifetime (Norris, 2011). Schools are prized terrain; it is an achievement in business to achieve a percentage of a market share; it is another to capture the mind of an entire generation (Robertson, 1998).</li> </ul>
<i>Marketing Haven</i>	<ul style="list-style-type: none"> <li>• Schools are themselves locations of sorting and organization. Children are systematically sorted by age, geography, programs and also direct and indirectly, by economic status, race, language, gender and ability. These are ideal circumstances by which marketers can specifically target and align messages (Norris, 2011).</li> </ul>

<b>Rationales for Commercial Practices in Education by External Organizations</b>	
<b>Theme</b>	<b>Rationales</b>
<i>Captive Unobstructed Audience</i>	<ul style="list-style-type: none"> <li>• Marketers consider students in schools as a ‘captive audience’ (Norris, 2011). Schools are the only public institution in society that can mandate attendance (Dryfoos, 1990). Today’s schools are also relatively commercial-free with limited advertising and thus they allow messages to reach their intended audience with limited impedance. There is no message saturation within this environment. Moreover, parental filtration is bypassed and thus marketers can achieve direct child exposure (Norris, 2011).</li> </ul>
<i>Economic Influence</i>	<ul style="list-style-type: none"> <li>• Children have an increasingly large purchasing influence over their parents and more readily become commercial representatives. In Canada, child influence accounted for approximately \$20 billion of household purchases (Froese-Germain et al., 2006). This “<i>kidfluence</i>” “<i>nag factor</i>” or “<i>pester power</i>” is so significant that some research refers to it as a ‘Trojan horse’ in modern child labour (Norris, 2011).</li> </ul>

Table 2: Provides a summary of the rationales for the seeking of commercial practices in education by external organizations and/or business.

The diversity of rationales for external organizations and/or business stems mainly from the diversity of organizations themselves. Whether the organization is governmental, non-governmental, charitable, for profit, not-for profit, or whether it is a business in the private or corporate sectors; each has its own set of goals, rationales and self-investment for establishing a relationship with education. To this, any one of these organizations or businesses could themselves make a legitimate claim or motion to a school or governing board and initiate participation or an engagement in a commercial practice.

### **Outcomes of Commercial Practices in Education**

As educational leaders grapple with a commercial opportunity or practice, take into account the varying rationales, motivations, and corresponding values, it is clear that their decisions will have trade-offs, positive and negative, for their stakeholders. Unfortunately, in the examination of commercial outcomes in education, much of the discourse orientates around the polarizing extremes; either denouncing commercial practices and focusing on the development of critical student competencies or accepting commercialism and sacrificing students to

corporations and consumerism (Feuerstein, 2001). Neither of these extremes portrays accurately the potential relationships and outcomes that might be formed between commercial opportunities and education; however as they are relevant to this inquiry, I present them below.

*The Costs* – Probably the most transparent cost to engaging in commercial practices, is the displacement of traditional educational activities with commercial ones (Molnar et al., 2011). Participation in a partnership takes time, effort, resources and usually involves release time from instruction for staff, students or both. To participate in the Canadian Heart & Stroke Foundation Hoops for Heart, school staffs are given supplied resources and are supported in organizing their local school event. Students and staffs are subsequently released from their academic responsibilities to participate ("Heart & Stroke Hoops for Heart," 2014). Likewise, to take advantage of government grants supporting entrepreneurship for high school students, Ontario schools organized entrepreneurial fairs, allowing students release time from academic responsibilities to participate in workshops and run their own businesses (Hoskins, 2013).

More veiled costs of commercial practices in education can include the undermining of an educator's efforts to foster critical thinking in their classrooms, potential psychological harm to students and a contradiction of messages delivered to students. Critical thinking is a divergent thinking process involving complex judgment, analysis, synthesis and reflection as defined by Gubbins (1985). This is in stark contrast to commercial practices centralized around marketing. Here products or messages are presented in a simplified enticing manner. The student not only accepts their meanings but in fact, inhibits (either actively or passively) the critical thought process to contemplate the message (Molnar et al., 2011).

Potential psychological harm is another potential costs that may be inflicted on the student at school due to an increased exposure to commercial practices. Schor (2005) underlines a child's increased exposure to media, increases consumer involvement (development of consumer values) and subsequently results in higher levels of depression, anxiety, poorer health and lesser social connections.

Last, is the possibility of direct contradictions between what students are being taught and what is being marketed (Molnar et al., 2011). This is exemplified by having a school follow a healthy living nutritional policy meanwhile selling baked treats during breaks as a fundraiser.

For the young student, they internalize the value of eating healthy except when consumer values are present.

Other research has pointed to costs more poignant to the Canadian society. They note and alarm, corporate perspectives' founded on the principles of materialism, consumerism and profits displace the traditional educational perspective of teaching Canadian societal morals, values and beliefs. This in turn changes the school environmentally from a traditional public realm to a commercial space. Arendt (1951) explicitly defends the importance of public realms. She contends they are more than a gathering of people, but as the action to which an individual's identity and uniqueness is disclosed to others (as cited in Norris, 2011). It is an individual's place of appearance within society. If a public realm is transformed to a commercial space, then its people too are transformed to consumers.

Another cost to Canadian society, is the societal change of childhood itself. Kenway & Bullen (2001) identify an increase in generational segregation for what traditionally was known as the childhood years, age 1-16. Commercial marketers are researching, creating and associating distinctive childhood ages with such specific segmented identities that sub-classes of childhood have evolved. They include infants (0-1 years), babies (1-2 years), toddlers (2-3 years), pre-schoolers (3-5 years), children (5-11 years), tweens (11-14 years), teenagers (14-17 years), and young adults (17-21 years).

Lastly, researchers are concerned that the monetary or resource contributions from external organizations overshadow the continued principal contributions put forth by provincial and territorial governments. Provincial and territorial governments have long been the key financier in public education since their compulsory inception in the late nineteenth - early twentieth century Canada (Arendt, 1951). Metaphorically, this would equate to highlighting a tree within a forest; a deeply inaccurate financial perspective. Researchers are also concerned that governments' use of external contributions removes pressure, accountability and the responsibility of governments to adequately fund public education. In this, it also explicatively states that external contributions are an unsustainable and unreliable funding source and should never alleviate pressure on the governments to provide additional funding. Saltman (2005) highlights that using commercial practices has been so engrained in modern society, that it is widely accepted as a viable solution to funding inequalities. Rather than addressing the complex

funding and spending habits within education, educational leaders are opting more for the ease of commodification and its allures, instead.

Although the academic literature presents an alarming concern with respect to commercial practices in education, it is important to keep in mind that commercial practices do bring resources and monetary benefits to schools. When schools engage in commercial opportunities, they do so in an attempt to move their educational missions forward. These goals might include increasing resources for school trips, providing specialized equipment, developing athletic programs, improving academic programs and offering enriched student supports (Feuerstein, 2001).

*The Benefits* - The most tangible outcome of commercial practices in education is the receipt of increased or additional funding, via donations, collections and/or foundation formations. These monies have an infinite amount of uses including student supports, programs, enrichments, and upkeeps. The raising of funds, of course, varies according to context, location and time, but can account for significant monies. According to the most recent national survey, the average amount of monies raised by schools per year was \$15,705. This included a range of \$14,072 for Ontario schools and \$27,700 for Northern schools (Froese-Germain et al., 2006). Markedly, this survey excluded large capital fundraising campaigns and major foundation drives which can surpass hundreds of thousands of dollars per school per year.

Equally as tangible is the securing of educational resources such as material, human or services. With limited disposable revenues, schools and teachers are securing unique educational resources to support their pedagogy by taken advantage of sponsorships and rewards programs. Nationally, 54% of schools reported using Scholastic educational materials and taking advantage of its rewards program for classroom materials and books (Froese-Germain et al., 2006).

By most accounts, teachers are overwhelmingly considered nurturing and generous professionals. They offer much and typically expect little, if anything, in return. This was supported by a survey conducted by the National Education Association (1996) whom estimated the average yearly expenditure of personal funds spent by schoolteachers was \$501 for elementary teachers and \$323 for secondary teachers (p. 172). When discretionary money is cut from school budgets, it is often accounted for by the personal spending of the classroom teachers. Thus any easing of this personal spending is often accompanied by relief.

## **Commercial Policies across Canada**

To begin our examination of commercial educational policies, let's first explore the current Canadian national landscape and then contextualize it within our region of choice, Quebec. According to the most recent national survey, some Provincial/Territorial Ministries of Education have identified commercial practices in their educational systems as an issue of concern; however few have developed specific policies or guidelines addressing the depth of partnership involvement, advertising, exclusive marketing, private donations, fundraising or user fees, in their governance (Froese-Germain et al., 2006). In contrast, some researchers note that certain accepted policies, indeed make it easier for commercial practices to be engaged.

One such policy was adopted in 2004 by the Ontario Ministry of Education. It directed and implemented an accounting change in school board financial management. Under the new policy, school boards accounted and consolidated their school fundraising monies and government grants within their general revenue. This policy gained criticizing notice as the Ministry could theoretically, with strategic confidence, reduce educational funding to locations where external (private) funding was more readily available.

Another policy was implemented by the British Columbian Ministry of Education, who allowed for the first time, its school districts to engage in entrepreneurialism by setting up their own private corporations. To manage any conflicting issues, strict guidelines were established opposing any overlapping of budgets as well as a clear understanding that no interference with day-to-day educational activities would be tolerated (Froese-Germain et al., 2006). Nonetheless, its relevancy drew public concern and many community members were left asking why school boards were aspirating resources to do so.

As a last example, it is currently being observed nationally, that an increasing portion of schools and school boards (36%) are seeking charitable tax numbers; presumably to entice and facilitate fundraising or donations (Froese-Germain et al., 2006). This unfortunately indicates a misunderstanding in the correlation between school fundraising and the Canadian tax system. When a private donation (from an individual or company) is made to public education, under the above pretence, the donor would receive a tax credit. This in turn excludes that donation from being taxable by the Canadian government. In effect, the more monies are giving tax credits by public education, the less revenue the government is able to collect through taxes. This

sequentially reduces the potential government allocations for public education; perpetuating the fundraising drives needed by educational systems. Within this system of replacing public funding (governmental allocations) with fundraising monies, the only real benefactor, circumventing any additional responsibilities yet receiving benefits, is the external donor (not public education).

The Ministries of Education for Ontario, Alberta, Prince Edward Island, British Columbia and Saskatchewan have all delegated commercial governance to its regional school boards or districts and notes that it is within their autonomy to develop their appropriate regional policies. The northern Canadian Ministries of Education for the Northwest Territories and Yukon, have both investigated commercial presence within their schools, with the Northwest Territories imparting that it was not an issue of concern and the Yukon was hoping to develop something in the near future.

In more visible responses, the Nova Scotia Ministry of Education, whom delegates commercial autonomy to its school boards, has reviewed its policies on advertising and in 2004 completed a provincial survey on school fees. After reviewing the results, the Ministry prohibited subject specific curricular fees. Schools were no longer able to charge student fees for subject specific consumables. This new policy received considerable scrutiny with complainants voicing a lack of replacement funding. In the end, the onus fell upon school administrators to recoup expenses.

In Manitoba, the Ministry of Education has developed a formal dichotomous funding policy regarding school funds. Type A funds include all monies from fundraising activities of the school, or under the patronage of the school. They are for the sole use of that school and thus they are not included in the school division's financial statements. They may include fundraising activities such as walk-a-thons, selling candies, dances, door-to-door, bottle drives, etc. Type B funds include all allocations from the school divisions and vocational revenues and include funds such as budget allocations, grants, auto shop repairs, cosmetology, etc. This dichotomous funding policy intended to simplify commercial language and create the needed foundations for which schools and school boards were encouraged to further regional policies, accounting practices and leadership guidelines.

In 2004, the Newfoundland Ministry of Education tried a different approach. It was then that the Ministry published a paper and actionable framework on school fees. The paper highlighted the equitable foundations of education and their goal of providing equal access for students, however maintained a contradiction by also clearly positioning themselves as not wanting to interfere with potential fundraising opportunities (such as school fees). More ironically, instead of attending to school fees, the Ministry was willing to set up a “top up” fund for parents who were unable to afford their contribution. In its statement the Ministry alleged “*enhancements to public education come at a personal cost*” and that a correct balance needs to be in place between activities and their respective costs (Froese-Germain et al., 2006).

In New Brunswick, a more progressive plan of policy implementations was developed by the Ministry of Education. These policies, in their minimum, would serve as the basic foundations for which schools and school boards must adhere to. Specific policies include “*School/Community Partnerships and Sponsorships (315)*,” “*Materials for Distribution in Schools (120)*,” “*Fundraising Involving Door-to-Door and Public Solicitation (708)*,” and “*Contribution of Resources by Parents (132)*.” Here it is encouraged, that if schools or school boards wish to adopt stricter policies regarding commercial practices, they too would be supported. These Ministerial policies have gained strong support by anti-commercialism advocates however have also received criticism for their vague wording and interpretations such as “*discreet and proper*.”

Thus in retrospect, the national perspective for dealing with commercial practices in education seems to be, at least at the surface, a delegation of autonomy to region educational leaderships with minimal, if any, Ministerial actions, supports, or guidelines. The Ministerial incorporations of anti-commercialism legislations by many provinces and territories within their Education Acts are counterintuitive without the necessary supports, such as guidelines for educational leaderships. The subsequent delegation of commercial freedoms (such as fundraising, school fees, receiving gifts and donations, and/or creating partnerships) giving to regional governing boards and/or school councils, also counteracts the proposed legislation leading some to believe that its adoptions is more political than genuine. The majority of prominent commercial governance from Ministries has come from indirect policy adoption such as nutritional policies. Within these policies, Ministries were able to govern some specific

commercial practices including exclusive agreements, advertising, sponsorships and fundraising, however only in a limited capacity. Where does Quebec fit within this landscape?

Distinctively, Quebec is in utter contrast to the rest of the Canadian provinces (with perhaps minor exceptions to New Brunswick) and is considered by most researchers as being leaps and bounds ahead with its attempts to limit youth exposure to commercial values and their influence. Trevor Norris is quoted as stating Quebec is “*a national leader in the regulation of school commercialism*” (2011).

To begin, Quebec has taken unique legislative action with the legislated and implemented Consumer Protection Act on April 30, 1980. It is a form of government regulation aimed to protect both the rights of the Quebec consumers and also child welfare, by prohibiting commercial advertising intended for children less than 14 years of age (RSQ, 2012). Within this legislation, section 248 specifically prohibits the act of commercial advertising intended for children less than 14 years of age and section 249 identifies the nature to which an advertisement is deemed “directed” to children. Its criteria includes (a) nature and indented purpose, (b) the manner (c) the time and place (RSQ, 2012). The act also identifies specific exceptions to sections 248 and 249 which include: section 88 – printed material, 89 – announcing a television program, and 90 – displays, labels, and containers. To ensure the continued credibility of applying these sections, section 91 was produced outlining specific “may nots” which advertisers must adhere to. This is all overseen by the Quebec Consumer Protection Bureau who is mandated to study all advertising materials and regulate them in terms of sections 248, 249 and 91 respectively.

Like all legislation, governance is weakened or strengthened within its assertion, interpretation, and understanding; the Consumer Protection Act is no different. Noting this, certain discretion and flexibility is required by the Quebec Consumer Protection Bureau and its respective advertisers in the application of ambiguous language such as “*intended for children.*” As a means of increasing efficacy and developing a proactive approach the Quebec Consumer Protection Bureau has released specific definitions and guidelines relating to commercial advertising to be used by advertisers. They also highlight that these sections merely apply to commercial advertising and not to educational or ‘public service’ advertising which are excluded.

Thus the Consumer Protection Act forcibly requires advertisers, typically acting but not exclusively on behalf of private sector corporations or organizations, to be conscious of intended messages and imagery being delivered to children less than 14 years of age. This unified dialogue of responsibility between both the government and private sector is critical in progressive governance.

Applying the Consumer Protection Act to the Quebec educational systems, with a maximum limit of children less than 14 years of age; both elementary and secondary schools are themselves implicated in its adherence. Elementary schools are evidently full of young students meeting the age requirements. However secondary schools with first cycle students (typically twelve/thirteen years of age) also meet the age requirements of the Act, and they too, must be accounted for during potential commercial activities and/or programs.

Secondly, in 1997, an amendment was made to the Education Act prohibiting school boards from receiving gifts, legacies, grants or other contributions to which opposing values of the schools missions were attached, particularly conditions relating to any form of commercial solicitation ("Education Act," 2012; Froese-Germain et al., 2006). In 1998, the Act was further amended and limited the funding a school may receive to three specific revenue sources: (1) funding allocated by the school board, (2) fees that the governing board may set or revenues from agreements concerning the use of school premises, and (3) donations, grants and other contributions ("Education Act," 2012). This newly amended Act also placed complete autonomy of soliciting or receiving gifts, grants and voluntary contributions to the school's governing board with the key stipulation that they are compatible with the mission of the school and that separate accounting procedures be used for its operation. As governing boards are an elected and diverse group of individuals (comprised of students, parents, teachers, support staff, school board representatives and community representatives) supported by school administration, the varied perspectives towards commercialism are approached with a spirit of democratic governance.

Lastly, the creation of a government policy guideline document in 1999, "*Guidelines for Schools on Advertising and Financial Contributions*," by then Minister of State for Education and Youth, Francois Legault, addressed the current issues of increased commercial presence in schools (Legault, 1999). After the amendments made to the Education Act in 1998, the Minister sought the opportunity to answer and provide guidance to the numerous questions being asked

within the educational systems regarding commercial involvement and partnerships in Quebec schools. Although, the document is appropriately titled “guidelines,” it clearly outlines the legal responsibilities school and governing boards must adhere to. The document contains key sections headlined “*What is at Stake*,” and “*On the Governing Board’s Agenda*,” which offer key questions and responses that could guide a funding proposal review. This would allow for the most appropriate decisions to be made regardless of the difficult contexts.

Although Quebec educators would not claim that their school environments are indeed 100% commercial free (Froese-Germain et al., 2006), the inception of these measures has set Quebec apart when it comes to the future of commercialization and its governance.

## **Conclusion**

In this chapter, I have presented an overview of pertinent published works regarding commercial practices in education as a means of solidifying a foundation for this study. It included subsections themed in the commercial ethical leadership of school administrators, the classification of commercial practices, the rationales for the commercial emergence, the respected outcomes of commercial practices and the current public policy landscapes for its governance. In the next chapter I will indentify and expand on this study’s research methodology.

## Chapter Two: Methodology

### Introduction

In the following chapter, I identify and expand on this study's research methodology. Beginning with the qualitative research design, I present the characteristics of qualitative inquiry, grounded theory methodology and detailed data collection procedures. I also offer insight into my personal connection with qualitative research as a means of situating myself within the study.

### Qualitative Research Design

Situating itself as a complementary qualitative inquiry, this study aims at developing a more comprehensive understanding of commercial practices in education. In doing so, the credibility and trustworthiness of this study will not lie within a set of statistical conclusions or certainties/uncertainties as in the quantitative research, but within the ideals of a qualitative approach. These qualitative assertions are best defined by Denzin and Lincoln (Creswell & Clark, 2007; 2005) who state.

*“Qualitative research is a situated activity that locates the observer in the world. It consists of a set of interpretive, material practices that make the world visible. These practices transform the world. They turn the world into a series of representations, including field notes, interviews, conversations, photographs, recordings and memos to the self.. This means that qualitative researchers study things in their natural settings, attempting to make sense of, or interpret, phenomena in terms of the meanings people bring to them.”* (Denzin & Lincoln, 2005, p. 3)

It is within this definition that three major philosophical characteristics of this study are coupled: an interpretive approach to research, unearthing value in meanings, and an attempt to transform the world (Creswell, 2003, 2013; Creswell & Clark, 2007).

As a direct participant in the study, I will account for my own role and the roles of my participants in interpreting meaning. The meaning drawn from the study is highly contextual and cultural, and is based on the perspectives of the participants.

Moreover, qualitative research aims to study phenomena in an organic holistic approach. Here it is important to recognize the multitude of factors and varied perspectives of the participant. This allows for a comprehensive co-creation of meanings.

Although philosophical worldviews and assumptions remain for the most part hidden within the research (Slife & Williams, 1995), they remain an integral part of the inquirer and thus influence the practice of the research. Here worldviews are frameworks or paradigms (Mertens, 2010), a set of broad concepts or beliefs that guide research. The constructivist worldview (constructivism or social constructivism), often merged with interpretivist theory (Denzin & Lincoln, 2011; Mertens, 2010), is the worldview, or lens, through which this study has been framed.

In a constructivist paradigm the researcher seeks to understand the world in which the participants live and work by focusing on subjective meanings of the experiences studied (Creswell, 2013). Focusing on meanings allows the researcher to explore the complexities of values (Imel, Kerka, & Wonacott, 2002). This is particularly appropriate for research in education.

Interpretivist theory also contends that realities are social constructs, relative to contexts, intentions and dynamics of social relationships (McCuthcheon & Jung, 1990). Meanings are thus formed through social interaction with others, rather than simply imprinted on individuals (Creswell, 2013). This is best expressed by Huron who writes “*human beings are symbolizing beings. They find meaning in and give meaning to their world, through symbolizing their experience in a variety of constructs and actions*” (As cited in McCuthcheon & Jung, 1990, p. 5). Social constructivism does not aim to provide any one or universal truth, nor does it look to provide broad generalizations. The aim is to inductively develop a theory or pattern of meaning focused on the processes of interactions among individuals in a particular time and context (Creswell, 2013; Imel et al., 2002).

The explicit focus on meaning in social constructivism offers many freedoms not readily associated with other philosophical frameworks. Its heightened value towards meaning allows for a wider range of research inquiry and also places emphasis on the active acknowledgement and engagement of the researcher and his own biases. Interpretivist researchers defend that biases are never eliminated and need to be addressed openly (Bucci, 2002). Interpretivist researchers thus recognize that their own backgrounds, cultures and values, have shaped their interpretations. They must position themselves within the research, if they are to indeed, successful attempt to interpret meanings others have about the world (Creswell, 2013). It is to

the nature of these differences that interpretivist theory, also referred to as anti-positivist theory, provides an alternative to positivist theory for the different aspects which it lacked.

The social constructivism and interpretivism worldviews are highly suitable for the qualitative research conducted in this study. The key educational leaders, who ultimately are the gatekeepers of commercial influence in education, are influenced by their own traditions, environments and values. Their philosophical outlooks and experiences shape their decision making. To understand the kinds of dilemmas educational leaders face regarding commercialism it is important to examine how their particular subjectivity, as situated in a given time and place, influences their decisions. Unlike positivism, which understands validity in terms of generalizable claims independent of subjectivity and context, social constructivism (and interpretivism) sees the variability of perspectives as strengthening the validity of the study.

Moreover, this study was designed within the principles and practices of fundamental grounded theory research championed by notables such as Glaser (1967), Strauss (1994; 1967; 1998), Corbin (1994; 1998) and Charmaz (2005, 2006). I examine these principles in the following section.

### **Grounded Theory**

This interpretive approach postulated in 1967 by Barney Glaser and Anselm Strauss was developed as a means of filling a void in the theoretical relevance of sociology research. At the time, Glaser and Strauss noted that sociological theories were not adequately comprehensive, inappropriate, or ill-suited for their participants of study. They sought an approach that entrenched (grounded) the data from the field within the experiences and relationships of their participants. It was through prioritizing this link, between field data and participant experiences/relationships that this interpretive approach attempted to move beyond description and aimed to create or discover new theory amongst the participants and their corresponding data. This, the two noted, is where grounded theory establishes its strength and trustworthiness. *“A key idea (of grounded theory) is that this theory development does not come “off the shelf,” but rather is generated or “grounded” in data from participants who have experienced the process* (As cited in Creswell, 2013, p. 83; Strauss & Corbin, 1998). Considering that school administrators engage or experience commercial processes or actions, grounded theory, was thus deemed both relevant and appropriate.

Glaser and Strauss, whom worked closely and exclusively during the development of grounded theory, eventually disagreed on its means, procedures, and approach; as such, many interpretations of grounded theory are seen today: Strauss and Corbin (1990, 1998), Glaser (1992), Charmaz (2005, 2006), Clarke (2005). According to Creswell and Clark (2007) two approaches have since asserted themselves as the most prominent; a systematic approach by Strauss and Corbin (1990, 1998) and a constructivist approach by Charmaz (2005, 2006). The study for this thesis is positioned in this second variant, a constructivist approach of grounded theory.

Charmaz, within her constructivist approach, embodied a flexibility focused on a theory development that relies explicitly on the researcher's view, learning about experiences within networks, situations and relationships, and making visible hierarchies of power, communication and opportunities (Creswell, 2007). Charmaz also emphasized adaptability on the views, values, beliefs, feelings, assumptions, and ideologies of participants rather than methods of research (Creswell, 2007). Within this study, the adaptability and flexibility in methodology of the constructivist approach is favored more so than prescription due to the complex, undefined and potentially reticent nature of the commercialism.

### **Connecting with Qualitative Inquiry**

In this section I will offer specific insight into my personal connection with qualitative inquiry. In doing so, I hope to provide a context to this study's research design and ultimately, my motivations for engaging in qualitative research.

As far back as I can remember, I was always encouraged, participated and was successful at what academia refers to as the "hard" sciences; the physics, the chemistries, the biologies, that is, the academic sciences (Guba & Lincoln, 2001). In secondary school, these courses filled my scholastic timetables and this continued into my university years, where I successfully completed a Bachelor of Science in Biology. I had been presented science as a dangling carrot and took the bait, full and wholeheartedly. Throughout these years, I continually internalized and reinforced the positivist values of objectivity, data-driven statistical analytics, and scientific methodology with pleasing passion. It was who I became, how I thought and ultimately how I taught science as a secondary school educator.

In my first year as a secondary school science educator, I learned one of the many realities of life as a teacher. Many of my students, regardless of my efforts, did not think as I did; they did not think objectively or analytically. In the beginning, this annoyed, toyed and frustrated my pedagogical approaches and efforts. However, as time passed, I matured professionally and personally, and came not only to accept this drastically different mindset but envied and celebrated it.

Not knowing at the time that I would eventually enter into research, these experiences led to my interest in qualitative research. First, being a professional educator requires an understanding and appreciation for many of the same foundations of qualitative research. Being open, valuing lived experiences, exploring emotions and working within various perspectives, are all critical, not only to the creation of a safe learning environment but also to an educator's professional development. You must engage both introspectively as well as with others and in a meaningful manner; much like qualitative inquiry. Secondly, I find qualitative research an intriguing challenge. Encircling myself over the many years within positivist ideologies has never given me a tangible opportunity to insert myself, with such value. This opportunity to introspectively explore my own experiences, mindsets and beliefs and then articulating them within research has been both a great challenge and reward.

### **Data Collection**

With grounded theory deeply rooted in theory emergence or the development of theory from data, it is fitting to highlight the implications and importance of gathering rich descriptive and focused data as a research design. As Charmaz writes, *“researchers generate strong grounded theory with rich data”* and *“the quality – and credibility – of your study starts with the data. The depth and scope of the data make a difference. A study based upon rich, substantial, and relevant data stands out”* (2006, pp. 14,18). Noting this direct impact, considerable efforts and reflection were made in data collecting activities. I was able to follow and incorporate new leads as they emerged, combining sequential activities and innovation in the data collection. The flexibility of grounded theory was clearly beneficial. As Charmaz also writes, *“Methods are merely tools. However, some tools are more useful than others...Grounded theory can give you flexible guidelines rather than rigid prescriptions. With flexible guidelines, you direct your study but let your imagination flow”* (2006, p. 15).

Having said that, it is important to emphasize that grounded theory is not immune to scrutiny. It must prove itself trustworthy. Thus, all data was grounded for its suitability and sufficiency. To do so, this study comprehensively reflected on the “circle” of interrelated data collection activities which included locating the site or individual, gaining access and making rapport, purposefully sampling, collecting data, recording information, and storing data (Creswell, 2007, p. 119).

### **Locating the Site or Individual**

In a grounded theory study, the selection of the site or the individual is extremely important and may follow two main guidelines. First and foremost, the individuals of study must have participated in the process or action of study. Secondly, the individuals studied should ideally be dispersed across many sites. Through this dispersion, important contextual data is gathered and incorporated during category formation (Creswell, 2007). Noting these two guidelines, school administrators were selected for this study, as they are most appropriately placed to make decisions regarding commercial practices within their own respective schools. This study prioritized their experience, perspectives and philosophies about commercial practices including public policy, educational law, and ethical educational leadership. School administrators work in conjunction with all of the above. They are also centrally involved in of school activities, mandates and goals and they occupy long-standing positions.

### **Gaining Access and Making Rapport**

Gaining access to sites or individuals and creating a rapport to allow for detailed disclosure can be challenging and involves several steps.

In preparation of this study, a comprehensive review was done and approved by the McGill Research Ethics Board Office (REB-II), noting compliance with provincial, national and international standards ("Research Ethics Board I, II, III," 2013). Following this, consent was attained by individual participants with a signing and acknowledgement of a consent form, which highlights the purpose of the study, the right of participants to voluntarily withdraw, confidentiality safeguards, disclosure of known risks, and benefits of participation; see appendix B.

Lastly and perhaps the most challenging, was creating a rapport with participants to allow for full disclosure. Conscious effort was made towards this goal by clearly communicating needs, expectations and requirements to participating administrators as well as offering personal anecdotes of understanding and reinforcing my past experience as a school administrator. Having this understanding, reduced many hierarchical power dynamics associated between researcher and participating subjects (Kvale & Brinkmann, 2009), and made the data collecting activities more collegial, unassuming and open.

### **Purposefully Sampling**

As noted above, the participants (sampling) for this study was school administrators. In contemplating this sampling, I looked at who or what should be sampled, what form of sampling it should take, how many people or sites need to be sampled and whether the sampling would provide data consistent with grounded theory research. Many types of sampling strategies exist to find the “right” participants for respective research. In line with Creswell (2007), this study used multiple strategies.

The study began with a consideration towards theoretical sampling, those key individuals whom would help with the creation or discovery of a theory, school administrators. This followed with a consideration towards maximum variation sampling, school administrators within Montreal, opening a vast landscape of contexts, experiences, and philosophies including socioeconomic, geographical, political and cultural. In “*maximizing differences at the beginning of the study, it increases the likelihood that the findings will reflect differences or different perspectives – an ideal in qualitative research*” (Creswell, 2007, p. 126). This was followed by random purposeful and chain sampling. Noting the sheer number of potential sites and individuals to study, this study relied on the expertise of an experienced and respected administrator to guide sampling efforts. To this end, school administrators within Anglophone school boards of Montreal were chosen.

In data collection, the size of sampling is equally as critical to the credibility of the research as the sampling strategies chosen. A conscious goal of this study was to ensure that an appropriate number of participants and sites were selected to ensure depth and detail, while at the same time drawing to saturation points in the creation of meaningful categories in analysis. I also carefully considered my own timeline, resources, and scope. In the end, five school

administrators were chosen. The administrators participated in multiple data collecting activities, interspersed across a calendar year.

### **Collecting Data, Recording Information and Storing Data**

In qualitative inquiry four main forms of data emerge: observations, interviews, documents and multi-media. Of these, interviews play the most dominant role in grounded theory research, with others (observations, reflections, memoing, journaling) providing a secondary supportive role (Creswell, 2007). Hence this study relied primarily on interviews.

The study adopted the practice of one-on-one conceptual interviews as its primary data source with multiple questioning types (introductory, follow-up, probing, specifying, direct, indirect, silence and interpreting). Here I focused on the major commercial opportunities in education, such as appropriation of space, partnerships, sponsorships, curriculum and classroom supplements, user fees, fundraising, and policies. Correspondingly, sub-questions about the extent, if any, do school administrators struggle with commercial influence in their decision making. I also asked questions on their relative autonomy, financial situations and on the appropriateness of various funding sources. This kind of exploratory interview, as Kvale and Brinkmann (2009) describe, “...has a structure and a purpose. It goes beyond the spontaneous exchange of view in everyday conversations, and becomes a careful questioning and listening approach with the purpose of obtaining thoroughly tested knowledge. (p. 3)” In their view a research interview is an interpersonal conversation between two partners regarding a theme of mutual interest and knowledge is created between the points of view.

An interview protocol was established with the intent of focussing the inquiry and addressing any participant concerns. I was very cognisant of the importance of respecting the participants’ professional responsibilities. Two one-hour long interviews were conducted across a calendar year to generate and reinforce the findings and conclusions of the study (Seidman, 2006). Organized via email correspondence, sites were left to the discretion of the participants but typically included school administrative offices. These were sites free from background noise and manageable in terms of unforeseeable distractions. They were also places where participants would be comfortable. Interviews were recorded using a personal recording device. According to Patton (1987), “the use of the tape recorder does not eliminate the need for taking notes. Taping allows you to concentrate on taking strategic and focused notes, rather than

*attempting verbatim notes*” (As cited in Bucci, 2002, p. 383). Participants were briefed (including ethical protocol) prior to beginning each interview and debriefed at the end. An interview guide was created. It was made accessible to both the participant and interviewer during the interview process, see appendix C. This maintained a relaxed fluid progression through the interview process while allowing for tangible elaboration of new leads.

Following the completion of the initial interviews, subsequent questions were developed prior to the second interviews to account for palpable gaps in data. Any missed opportunities, or the emergence of new leads, were also addressed within email correspondences. Lastly, descriptive memoing, as recommended by Patton (1999), was completed prior and following each of the respective interviews by the researcher. These descriptions include feelings, setting, observations, locations, conditions, reactions, wellness and rapport. These all inevitably influence the interview data and thus should be accounted for within the research (Bucci, 2002).

The recorded interview, notes and researcher memoing were then transcribed. These transcriptions took into account the interpretative process. As Kvale and Brinkmann (2009) highlight, *“an interview is a live social interaction where the pace of the temporal unfolding, tone of the voice, and the bodily expressions are immediately available to the participants in the face-to-face conversation, but they are not accessible to the out-of-context reader of the transcript* (p. 178).” Memoing and interview notes were organized and incorporated within the transcription process to allow for more contextual interpretation. The transcribed data and recorded digital audio files were securely stored on the password protected personal computer of the researcher. Backups were also created and stored on an external memory device secured in a lockbox. Lastly, to ensure, participant confidentiality, digital file names masked the identities of the participants

### **Credibility, Transferability, Dependability and Confirmability**

As with all interpretative research, two schools of thought can be found with respect to the appropriateness and use of grounded theory research. Proponents of grounded theory see interpretation, subjectivity and biases as strengths, while critics see them as weaknesses. In my view, the challenge of the researcher is to account for pre-established theory while also allowing of an organic theory to emerge. The researcher must be able to determine subjective category saturation points and theoretical sufficiency. In the end, I selected grounded theory because it is

especially appropriate when a theory is (a) not available to understand a process, (b) is incomplete and does not address the other significant variables and (c) when the subject of study is based within the experiences, interpretations or perspectives of the participants (Creswell & Clark, 2007). These elements certainly apply to the perspectives and practices of school administrators regarding commercial practices in education.

Qualitative researchers define and evaluate their work within non-positivistic goals and terminology. Still committed to academic rigour, the researcher replaces the methodological categories of validity, reliability and objectivity with a focus on credibility, dependability and confirmability. Seen in this light, the study's goal is to establish "trustworthiness." According to Guba (1981) and Lincoln and Guba (1985), trustworthiness is achieved through four aspects of the research: truth value (credibility), applicability (transferability), consistency (dependability) and neutrality (confirmability).

### **Truth Value (Credibility)**

According to Guba (1981), truth value is the confidence a researcher has vis-à-vis his or her findings. It also refers to the confidence the researcher has about the selected research design, the participants and the context. In this study evidence of truth value is found in five particularities: using accurate descriptions of lived human experiences, becoming familiar with the culture of the research site, triangulating the data, using well established research data and progressive member checking throughout the study. The choice to interview school administrators with open-ended questions allowed for rich descriptions of contexts and perspectives. The administrators remained in control of sharing their lived experiences and embarked in the study as co-researchers; I, the researcher, was merely a guide.

As a fellow school administrator, I already had a good understanding of the role and responsibilities of the school administrators. This contributed greatly to building familiarity within the culture of the research site. It allowed me to be proactively prepared for uncertainties such as distractions and participant stress, as well as engage collegially with the participants. This significantly reduced participant anxiety and any power imbalances.

The primary data sources within this study were administrator interview transcripts, field notes/memos and educational publications. Their triangulation helps establish credibility and academic rigor by constantly comparing intersecting points of interest. Also, the grounded

theory methodology, with the constant comparative approach to data analysis, described previously, was used to unitize code and analyze the data in a thorough and methodical manner. Both well-established within their own rights, these sound means for research design added to the legitimacy of this study.

The use of progressive member checking in qualitative research is the process by which participants are consulted throughout the study to ensure appropriate and accurate use of their lived experiences or perspectives (Maykut & Morehouse, 2002). Throughout this study, participants were consulted numerous times and shared appropriate documents such as interview interpretations, emerging themes and conclusions. They voluntarily provided feedback at various points depending on their own perspectives, interpretations and urgencies. This study also made use of a peer debriefer. A peer debriefer is a critical colleague whom helps the researcher with design decisions, analytic categories, emerging themes and build explanations for the central phenomenon (Morrow, 2005). They both challenge and support the researcher. Along with the continued debriefing sessions with the study's supervisor, both member checking and peer debriefing, reinforce the truthfulness of both data and findings.

### **Applicability (Transferability)**

Applicability was proposed by Guba (1981) as the ability for findings to fit outside the contexts for which the study was conducted. In this, there must be a similarity between the two contexts. Lincoln and Guba (1985) note that this responsibility lies more within the transferor of findings and not the original researcher. To them, the primary responsibility of the original researcher is to present sufficient descriptions to allow for a comprehensive comparison to occur.

Within this study, considerable attention was paid to make background information and rich descriptions forthright in hopes of establishing a strong contextual understanding. The study was also open with respect to theoretical and methodological orientations and understandings. I provided clear outlines and transparent descriptions of the analysis process including unitizing, coding, categorizing, and interpretations. At numerous times, I also situated myself with the study, increasing the accountability of the researcher's contexts, understandings and perspectives. All of these efforts would provide a reader with significant information to make an insightful decision regarding the study's transferability.

### **Consistency (Dependability)**

Consistency in qualitative research tends to differ vastly from the quantitative definition of precisely replicating the findings of the study with the same subjects or similar contexts. Instead, in qualitative research, emphasis is more appropriately placed on learning from participants and not on controlling them. In the end, control within a qualitative study is more of a false projection of the researcher in any case; the main research instruments are themselves both dynamic: the researcher and participants. Consistency was thus proposed by Lincoln and Guba (1985) as the traceable variability to identifiable sources of the findings and research data.

Within this study, the use of overlapping data collection methods such as participant interviews, fieldnotes and analysis of published educational documents as well as the continued comparisons of the constant comparative approach increased the dependability of the data and findings. I also believe specific aspects of the interview process itself added to the dependability of this study. The use of audio recorded transcripts with open ended questions provided rich details in the lived experiences and perspectives of the participants. The use of a detailed interview guide provided consistency in guiding conversations amongst the various interviews meanwhile also allowing flexibility.

Lastly, the prolonged dialogue over a calendar year between the researcher and participants allowed for three critical dependability outcomes. First, it negated any one-time participant fatigue or compromising changes in the participants' life situation. Second, it provided each the necessary time to appropriately reflect and engage more profoundly within the research. And third, it allowed for the methodical coding of data (imperative to the recalling of data for constant comparative approach) throughout the analysis process.

### **Neutrality (Confirmability)**

Neutrality was originally proposed by Guba (1981) as the degree to which the findings are a result of the participants and their conditions and not of other biases, motivations or perspectives. Lincoln and Guba (1985) argue for moving past "researcher neutrality" (a hypothetical stance in quantitative research) and instead prioritizing "data neutrality." This shift in focus to "data" instead of the "researcher" is critically important to qualitative researchers, as they place increasing value on paying attention to their own biases within the study.

With this in mind, considerable effort was placed to ensure a proper representation of researcher biases with acknowledgements and accounts rather than “hypothetically” ignoring them. As previously mentioned, this can be found within numerous sections of the study. To this, a major effort was also exerted to strive for data neutrality. I created an audit trail throughout my study (an account of study’s dates and activities). I engaged in reflective memoing, and triangulated data and analysis. These, alongside of continued engagements and accountability to participants, increased the confirmability of this study.

## **Conclusion**

In this chapter, I identified and expanded on this study’s research methodology. Beginning with the qualitative research design, I presented the characteristics of qualitative inquiry, grounded theory methodology and detailed data collection procedures. I also offered insight into my personal connection with qualitative research as a means of situating myself within the study. In the next chapter, I analyze the data and discuss the emerging themes from the study.

## Chapter Three: Exploring Coding, Emerging Themes & Building a Theory

### **Introduction**

In this chapter I analyze the data through a constant comparative analysis and present the emerging themes from the study. These themes include: the increasing societal and systemic expectations placed on schools and school administrators; the observance of commercial practices in Montreal schools; and the ethical educational leader is critically important in the management of commercial and financial practices in schools.

### **Data Analysis – The Constant Comparative Approach**

In grounded theory data analysis, the analysis is procedural by nature and is by no means separate from the other parts of inquiry. It begins prior to the launch of the study and continues well after the research is completed. It is ruminative and non-linear.

Procedurally, this study followed the well-established analysis approach known as constant comparative. Aptly named due to its rigorous means of coding, unitizing and categorizing of data, its processes allow for the production of meaningful thematic propositions or statements. To begin, I engaged in a process of close readings, re-readings of interview transcripts and field memos to further my understanding of what was assembled. This was then followed by a re-listening and memoing of recorded interviews, listening for specific voice cues, expressions and pauses. After reaching a point of saturation, with the data no longer offering any additional leads or interpretations, I began three phases of coding; open, axial and selective.

I coded each page of the participant interview transcripts and field memos by participant alias, page number and date (month). This resembled, RQ/5/Sept., page five for participant RQ whom was interviewed in September. This seemingly minute coding, allowed for the quick return and reference of raw data to contextualize statements later in the processing.

The next step in the analysis process was the unitizing and coding of raw data. Using the textual formatting feature of Word 2007, I imported raw interview transcripts and field memos into Microsoft Excel 2007 vertically listing line by line each sentence of the initial transcripts. I vertically re-read, line by line, each transcript and grouped sentences on captured meaning and context. To contextualize this, I offer the following example from LS/2/Sept.

*“That's why we have coding. That's why you have to go to tendering. Because how easy it is that my buddy owns a company and even if he could overcharge me and I still chose him, you see its non-ethical.”*

This line by line comparison and grouping was followed by the creation of an open coding name for each statement in the cells adjacent to that column. These descriptive codes represented an interpretation of the meaning behind the transcript data. This initial unitization produced many and varying units, including, -budget; - administrator salary; - communication; - community; - financial management; - governance; - motivation; -personal values; - philosophies; -socioeconomic factors; etc.

After completion, I reengaged with the central phenomenon of commercialism in education as well as the collected data, in a coding process known as axial coding. In axial coding, another review of the raw data is completed, framed in exploring the explanations or relationships in accordance to the central phenomenon; commercialism in education. Within grounded theory research, two predominant axial coding process exist; that according to Strauss and Corbin (1990, 1998) and that of Charmaz (2005, 2006). For Strauss and Corbin (1990, 1998), these explanations and relationship categories are prescribed and the researcher would frame their axial coding through the following categories: causal conditions that influence, strategies for addressing, the context and intervening conditions that shape the strategies, and the consequences of undertaking these strategies on the central phenomenon. This proved to be contextually too rigid for the goals of this study and thus I choose the more appropriate constructivist approach developed by Charmaz (2005, 2006). Charmaz advocates for flexible guidelines, prioritizing emphasis on the views, values, and beliefs of the study participants and allows the researcher to develop categories, questions and advances their own personal values, experiences, and priorities (Creswell, 2007). In utilizing Charmaz's axial coding process, the collected data and researcher create the axial coding categories, which is ultimately used to create the coding paradigm, the theoretical representation of the theory being built or generated.

To axial code, the use of Excel 2007 proved to be invaluable as it allowed for the virtual manipulation of raw and interpreted data and made corrections exponentially more unproblematic than using the traditional approach of using printed materials. Using the suggestions of Maykut & Morehouse (1994), once I grouped six to eight data statements into a category, I created a *“rule of inclusion.”* This rule subsequently served as a guide in the

comparison, grouping or new category creation, of all further data. To exemplify this, in the creation of the conceptual category “*additional school programming, activities and events*” I marked the rule, “*additional activities will include all student-centered activities or programs, school-wide/staff-lead engagements or community and societal involvement.*”

Through this practice, I was able to comparatively group and code, seeing categories develop and narrow throughout the progress. It was thorough and through this process of analysis, descriptive codes identified earlier in the analysis process transformed, in conjunction with the grouping, to conceptual codes. This is exemplified by the following two examples: the twenty-seven raw data statements descriptively coded as “*socioeconomic factors*” evolved into the conceptual category and code of “*school, staff and student backgrounds and adjustments to poverty and affluence.*” And the fifty-three raw data statements descriptively coded as “*school climate*” evolved into the conceptual category and code of “*school challenges, needs and perceptions in accordance to openness, diversity and inclusivity.*” This comparison and exploration with interviewees, transcripts and memos continued until a “*saturation*” of conceptual categories was reached. I considered this as a theoretical interpretive target by which, new data did not provide any further insight into the established categories.

Lastly, I utilized the thirteen axial coding categories to complete the process of selective coding. This third phase of grounded theory coding is the process by which the researcher generates propositions (or hypotheses) or statements that connect the axial coding categories (Creswell, 2007). Here I was able to create three significant conceptually emerging themes: Increasing societal and systemic expectations have notably added extra responsibilities and pressures onto schools and their corresponding administrations; the observance of commercial practices by school leadership in the accounting of resource needs; the ethical educational leader is critically important in the management of commercial and financial practices in schools. Appendix E provides a summary table of a conceptualization of coding progression through initial coding, axial coding and emerging themes.

## Exploring Participant Themes

### Increasing Societal and Systemic Expectations

Increasing societal and systemic expectations have notably added extra responsibilities and pressures onto schools and their corresponding leaderships. This is occurring with increasing frequency, mounting complexity, and limited resources. The “average” school is no longer a place where students simply check in, learn specific curricula, and check out. Schools have evolved to become pillars and social hubs within their local communities. They are often offering students and community members, a variety of resources, programs and services beyond that of regular educational services. In today’s schools, it is no longer a distinguishable mindset to offer or not to offer an extra program, resource or service. There exist already pre-engrained expectations within local communities and from educational stakeholders that schools must maintain a certain stature and offer more programs, resources or services.

*“And it is again, important for all schools, in this very competitive market, of public vs. private, that the schools look good. Right, and that kids and parents when they walk into the building have a certain expectations, as much as when we walk into a hospital we want to see it neat and clean, floors shinny; just waxed.”*  
– Participant #3 in speaking to the competitive market of education and expectations of students and parents.

*“So they spend a lot of time on the train and on the bus because their looking for the type of program that suits their needs...”* – Participant #4 in speaking to the great distances students are willing to travel to attend a specific school with specialized programming.

*“School fees will unfortunately probably have to be increased, if you expect it, parents expect a certain amount of materials in schools, of looks of schools, it takes money.”* – Participant #5 in speaking to parental expectations and school fees.

To this, school administrators are continually balancing the number of programs, additional services and resources they are offering, how diverse they can make them and to what degree they will be effective. To state this as challenging, is a clear understatement. Having fixed resources and the multitude of perspectives makes balancing this feat, extremely taxing and laborious.

To exemplify this dynamic balance, let's highlight an example noted as a shared concern by all administrators, the upkeep of school infrastructure (the building). As highlighted above, all the various educational stakeholders have unique roles and legitimate perspectives within the educational system and thus, have unique views and expectations of their school building. When discussing the various stakeholder expectations with this study's participants, these generalizations were established.

- Students expect space and practicality. They expect access to their lockers in proximity to their classes. They expect ease and access to technology and networks. They expect to feel a sense of ownership and have their work displayed. And they also expect an attractive school and want to be proud of it.
- Parents expect a sense of safety, security and opportunity. When their children are at school, parents want reassurance that their child will be safe and in a positive learning environment. They want to know that the education their child is receiving is worthwhile.
- Staffs expect a professional work environment. They expect their own personal spaces, free from students. They expect clean and maintained structures and also ease and access to technology and networks. They expect a balance between work-place practicality and cosmetic appearance.
- Boards and ministries expect a functional professional work environment. They expect essential systems to operate efficient and maintain a degree of longevity. They expect upkeep and supervision will be maintained and prioritize structure over cosmetics.

Each of the above perspectives has its own merit and each one within its own right can be critical to the overall performance of school operations. An administrator must navigate, prioritize, communicate and find the appropriate balance. This becomes exponentially more difficult when resource limitations (fiscal, material or human) are compounded into the equation.

*“Exactly, and that is hard to maintain in a school when you have sort of minimal budgets to do it.”* – Participant #3 in acknowledging their own challenges.

The challenges faced by administrators are equally seen within other aspects of schools functions such as student supports, programs and services.

## **Student Supports**

Student success and wellbeing is and has always remained at the forefront of educational leadership philosophy. It serves as the guiding principle in the decision-making processes of administrators and is the visionary template of school mission statements.

*“We are above the school board average but it is still not enough, because my ultimate goal, people might think I’m crazy, but what is my ultimate goal? 100% success rate.”* – Participant #2 in speaking to his vision for student success.

However it is apparent that today’s schools are taking student supports beyond guidance, career preparation and academic help. They are providing specialized inclusive programs, resources and services to all students regardless of academic achievement, socioeconomic upbringing or school involvement. Designed with the intent of overcoming personal student challenges, all students now have equitable access to vast networks of student supports services, allowing them each opportunities to individually prosper.

For a struggling student, school supports traditionally meant a one-on-one meeting with a teacher, after-school guidance and/or additional homework sent home to parents; however this is no longer the reality. Today, schools are expected to expend extensive resources, mobilizing action and utilizing educational specialists to find appropriate and personal solutions to student difficulties. Referred to as student interventions, these solutions often include targeted literacy and curricular programs, mentoring and perseverance initiatives, social, behavioral and cognitive development supports, and/or health and wellness programs. These interventions examine and reflect on all aspects of a child’s life and try to provide appropriate solutions or guidance. They may range from basic human needs such as food, shelter and healthcare to more poignant and delicate measures including emotional wellbeing, intimidation workshops and student retention.

*“So that definitely affects lots of things right. It affects how you go about trying to even out that playing field. Because as we know in more affluent schools there is experiences that are happening outside of school that aren’t happening for my kids very much and that definitely shapes their views, shapes how they learn, shapes everything. So to go back to NANS, I receive grants from NANS to help*

*me do that extra stuff.” – Participant #1 in speaking to how poverty affects her students and the need to provide adequate support.*

For achieving students, whom can be often overlooked due to their typically non-confrontational behaviors, they too are gaining access to specialized student supports and enrichment programs. Varying in inclusiveness and depth, enrichment programs typically include experiential learning programs, environmental stewardship programs, cultural exchanges, science and technology initiatives, community outreach and advanced or post-secondary curricula. They are demanding, target exclusive academic or developmental goals and have the potential to create uniquely rewarding experiences for students.

*“I think we are doing very well, but there are pressures to offer more than what we are offering because it’s an affluent community. Because they are motivated to learn and to do other things that may be out of the ordinary for some other schools. And oddly enough the pressure comes from the parents.” – Participant #3 in speaking to the culture for program enrichments.*

Thus regardless of the academic achievement of the students, the socioeconomic situation of the family, or the location of the educational institute, schools are offering a multitude of additional student supports to better serve their students.

### **Extra- and Co-curricular Programming**

As a means of fostering different cognitive, physical and social development outside the classroom, extra- and co-curricular activities have always been an integral part of the educational experience of students. Today, school administrators have readily understood the influence, benefits and personal enjoyment they bring to their student bodies. From this, administrators are readily fostering and supporting their expansion and diversification. School calendars are being filled with extra- and co-curricular activities hosted by student clubs, student associations, special guests, art programs and multicultural groups. The traditional student-centered extra- and co-curricular programs such as student councils, activity days, recreation and after-school clubs are still being offered; however are occurring in conjunction with larger, more elaborate and organized extra- and co-curricular activities including volunteer opportunities, community outreach, charity and awareness campaigns, and large scale school productions.

*“Next year, we are planning on doing an extracurricular activities fair; so many of our extracurricular activities are taking place in the school but are moderated by many people who are not teachers, outsiders if you will, so..... is going to have a couple of booths with the activities that they have, I have hired ..... to do a radio thing”* – Participant #3 in speaking to the support and publicity of extracurricular activities within their school.

*“The goal of the program is to get you involved in your school community and it’s been extremely successful for us and the kids generally enjoy it.”* – Participant #4 in speaking to the goal of extra- and co-curricular activities.

There is clear evidence that schools are consciously attempting to engage all of its students in some form of extra- and co-curricular activity, sometimes at great expense.

### **Student Athletics**

Today, schools are also showing considerable diversification within their respective athletic programs. Like extra- and co-curricular activities, school administrators, understand the influence, benefits and personal enjoyment of playing sports and being a part of a sports team. In this, school administrations are readily fostering and supporting athletic developments and diversifications as best they can. Whereas in the past, athletics programs were closely linked to the neighboring properties that surrounded the school, schools are now providing athletic opportunities both near and far, as well as both traditional letterman school sports (hockey, football, field hockey, rugby, lacrosse, baseball, volleyball, swimming) and new or emerging sports (tennis, cricket, martial arts, squash, skiing, table tennis, diving).

*“We had a huge athletics program and we did a walk-a-thon. And the idea was that all of our athletes, which was probably at any point and time 25% of the school, minimum, they would go and get sponsors. That these sponsors knew, like you know, you go door to door, you get your parents to give you 5 bucks. And we did a whole walk-a-thon, and the police would help out and this kind of thing and they were walking to make money for their school, so it was a school spirit things and parents knew what they were paying into. So that became a fundraiser.”* – Participant #4 in speaking to the grander of the athletics program and a method for funding it.

School administrators are also consistently offering both male and female athletic programs, consciously breaking down societal typecasts and ensuring equitable access for both

genders. These conscious athletic expansions profoundly benefit a student's health and educational experience however for an administrator, implies a considerable extra expenses.

### **Beyond the Role**

In the spirit of developing well-rounded students, school administrators are continually fostering and supporting additional student supports, extra- and co-curricular programming and student athletics as comprehensive foundations of a child's educational experience. However, they have also supported new community initiatives, shifting their philosophical foundations, opening their doors, and are now serving the public at large. As hubs within their respective communities, schools, sometimes with the distinction of community learning centers, are going above and beyond their traditional roles. They are becoming tangible community resources. Under the discretion of school administration and in cooperation with community organizations, some schools are wearing multiple hats and carrying additional responsibilities.

*“Because there is a notion of a community learning center approach to schools and we have some true community learning centers... and so there is definitely liaisons between different partners in the community. And that it is a much more direct benefit, I think, to having these partners; the schools benefit, the kids benefit, and the partners benefit as well” – Participant #4 in speaking to the community learning center approach and benefits.*

As community learning centers, schools are offering library programs, daycare services and adult education to the public. As a community recreation centers, they are opening their gymnasiums, theatres, and mezzanines for public and summer recreation. As community health centers, they are offering space for vaccinations, dental and clinical programs and as community halls, they are offering space for community festivals, meetings, elections, and performances. This is of course above their regular daily function of providing quality education to children. It also excludes specific stakeholder use, such as teachers and staffs, home and school functions, parental organizations and school governance meetings.

*“It works more efficiently in the urban setting than in the rural setting but essentially our mandate is to bring in the community resources as much as possible into the school so the families can benefit from them... So we've got things like French classes going on, for free, on Saturdays that anybody can come*

*and register for.”* – Participant #1 in speaking to the local outreach of community learning centers.

Although, direct cost associated with using the school space can be challenging to calculate, in its minimal, utilities, consumable resources, and infrastructure wear are incurred. Thus, these schools are becoming busy hubs within their local communities however do so by incurring additional expenses on the local educational system.

### **Commercial Practices in Montreal Schools**

The evolution and modernization of school programs, resources and services, noted above, are almost universally seen to be noble, beneficial, worthwhile and meaningful within their educational systems. Each one benefit's a child or community member, each one provides something the others do not, and each one merits an investment of school resources. However, therein lays the challenge. How is an administrator able to resource the many realities, expectations and pressures placed on schools, as well as the multitude of pertinent school needs, which include economic, societal, systemic, and environmental?

It is extremely challenging. Schools are simply offering students, many more programs, resources and services than they are fiscally being financed for by the current governmental allocations. It explains why, when asked about their current financial situations, all administrators, noted fiscally tight or deficit budgets when relying on government allocations alone.

*“Budgets are tight, budgets are very tight... They are getting cut all the time.”* - Participant #3 in responding to their fiscal situation.

*“...because there is so many budget constrictions every year. Last year, for the last two years, it was 5 million in compressions; this coming year, its 3 something. So we are looking 14 million in compression in three years, there has to be an effect, a fallout somewhere and it's not up there that it happens, it's with the kids. It's terrible.”* – Participant #1 in speaking to fiscal compressions.

*“That is, one of our biggest challenges, the amount of money that is provided by the school board and MELS, does not adequately fund that area, we have huge needs in trying to keep up our building and we are not even talking about structural things, so we look for other ways to finance that usually through fundraising”* – Participant #4 in speaking to funding inadequacies.

*“Oh, it was getting tougher all the time, but we had enough money to do the basics. But schools don’t want to do the basics and you want, we also subsidize a lot of kids, because they didn’t have money. So we were always looking for funds. Where we started to feel the pinch, we had a huge athletics program, and we had pretty much always paid for everything, but over time, things were getting a lot more expensive. Gas was getting a lot more expensive. So we saw the cost of busses going up significantly. You know things you just don’t anticipate, they become school realities. When you’re sending these kids off on these busses, and you suddenly notice you are paying hundreds of dollars, extra, where is it going to come from?”* – Participant #2 in speaking to tight fiscal situations and the evolution of financial management.

In Quebec, publically run schools are financed via provincial government allocations (from provincial transfers or collected taxes), managed by the Ministère de l’Éducation, du Loisir et du Sport and distributed through school boards to individual schools. Allocation totals typically take into account various criteria including the number of students, special educational support requirements (special needs), and school geographies. This ultimately leads to a per student capita evaluation (estimated at \$108/student) which, when equated with school enrollment figures, offers a sum total operational budget. Theoretically, a school with an enrollment of 350 students receiving \$108 per student would be offered an operational budget of \$37,800 for the year.

Although at first glance, this budgetary sum might seem as ample resources to fund school operations for a single year; for those administrators in the field, it is simply the contrary. While administrators noted it was enough to fund a basic educational program, the multitude of expected programs, resources and services, offered by schools, are costly and the school budget can be exhausted quickly.

To solidify this with an example, let us reconsider the example of maintaining the upkeep of school infrastructure from above. As noted by administrators, no additional funds are offered for the general upkeep of school infrastructure (special additional funds are typically only allocate for large essential capital campaigns or essential renovations). Thus, if minor renovations and plumbing work is required within one of the school’s washrooms (a faulty or clogged toilet), it is within this operational budget of \$37,800, that it will be paid. As estimated by administrators, having any trade professional come into the school to do contract work is costly. They note cost can easily escalate to \$1,000 per day excluding materials. From this, any

unforeseen renovation, program implementation, or resource requirements, can quickly compromise the budgetary allocations. Theorizing, the above minor washroom renovation, in addition to the planned re-wiring of a classroom for internet access, maintaining the school landscape, and replacing sidewalk stones, would quickly exhaust operational resources before even essential programs, resources and services are financed.

Thus administrators and school leaderships, appear to have no choice; if they want fiscal stability and maintain expectations of programs, resources, and services, they must both continually request and re-request additional funds from their superiors (a behaviour that is diplomatically being practiced by administrators) and rely on their skillful financial management including their capacities to creativity seek out and solidify additional school resources.

It is also in an administrator's best interest to seek out additional resources. Using any such additional resources to diversify programs and services, meeting current and future stakeholder expectations will ultimately increase the school's reputation, allure and enrollments. In a competitive market where enrollments matters, alluring prospective students and meeting stakeholder expectations, only solidifies a schools fiscal stability and performance. This is a direct positive feedback loop. These "*equalizing situations*" faced by school administrators, are leaving educational systems very much open to commercial influences, and it appears, Montreal schools are no different.

This study examined seven of the eight commercial practices found in educational systems including: sponsorships of school programs, exclusive agreements, sponsorships of incentive programs, appropriations of space, sponsorships of supplementary educational materials, fundraising, and digital marketing (Molnar, 2005). After reviewing the accounts, perspectives, and attestations of school administrators, it is readily evident, that within the Montreal schools, commercial practices do exist in varying degree. There are, however, slight variations in the specific commercial practices as pre-defined by Molnar.

## **Fundraising**

With budgets being defined as tight or limiting by administrators, fundraising is easily the most prevalent commercial practice being observed or practiced by school administrators. Molnar (2005) defined this fundraising as the selling, auctioning or marketing to subjects of products and services in return for financial contribution by corporations. In this definition, there

is an explicit external infiltration by corporations. This is in contrast to the experiences of Montreal administrators where instead of an external infiltration of schools; schools are more openly seeking out opportunities in an externalization of fundraising practices.

*“So I can’t say in terms of the monies coming into the school, no, we didn’t get a lot.” – Participant #2*

Schools and administrators were reaching out, more than they were reaching in. In this, a plethora of fundraising practices were observed and being performed by school administrators ranging from charging fees, fundraising by student activities, procuring grants, parental and community fundraisers, school-wide fundraising initiatives, explicit donations and/or the creation of school foundations. These fundraising activities creatively varied, in personnel involved, breadth, financial goals, and accompanying effort.

*“Ok, chocolate bars. I can’t say was ever my decision, so I can’t answer for chocolate bars, no but we did have. No it was just something I inherited. It was always there. All schools had this. That’s what we do in schools right. We prostitute ourselves. Well I just figured you know. We were getting for it... Once, the chocolate bars dried up; everybody was looking for ideas, so selling coffee...”*  
– Participant #2 in speaking to the history of chocolate bar fundraisers and the climate of school fundraising.

At the end of the scholastic year, administrators remarked about the substantial benefits and fiscal contributions gained through fundraising activities.

*“The year that they took away chocolate bars, I have to tell you, I spent 25% of my time as an administrator on fundraising that year.” – Participant #2* in speaking to the amount of required effort for effective fundraising.

However in the same breath, also noted that like all things of worth, the fundraising totals, directly related to the effort their school or staff put forth in their amassing.

## **Sponsorships**

The second most common commercial practice is the use of school sponsorships. Molnar (2005) identified three different sponsorships; sponsorship of school programs, sponsorship of incentive programs and sponsorship of educational materials. These sponsorships typically involves the engagement with schools by external actors, in an attempt to either increase their

marketing reach (increasing brand recognition or improving significance and public relations) or to increase the overall opportunities for profits. However, various other sponsorship-like activities differed slightly from Molnar's categorization. In this, this study also includes the creation of partnerships between schools and external organizations within these categorizations. Partnerships have the ability to achieve the same objectives as Molnar's defined sponsorships. For example, the corporate sponsorship of a school service might, from the perspective of an external actor, increase brand recognition in an attempt to secure future profits. A partnership, on the other hand, might offer the same service, free of charge, in exchange for the space to perform it. In this acquisition of space, the external actor maintains brand recognition, yet lowers the bottom-line expenses, thus securing the same overall profit margins.

Numerous examples were observed and practiced by school administrators for both sponsorships and partnerships within Montreal schools. However in their classification, two general classes emerged: direct and indirect sponsorships.

Direct sponsorships typically included direct contact between local businesses, community organizations, associations or individuals with school programs, resources, or services. Examples varied but sponsorships included student participation in experiential learning projects, athletic services, extra-curricular programming, student support initiatives (perseverance and wellness), and resources.

*"...we have a group that does some kind of martial arts, but they don't have a physical space to do it in. So they use our gym three nights a week for free but they allow our students to participate for free. So there is no money exchange but there is a value there."*- Participant #1 in speaking to a partnership agreement with a local martial arts club.

Indirect sponsorships included educational programs, resources, and services, which benefited from a sponsorship however where not directly associated with the provider. These sponsorships were typically secured by external affiliations to the school, such as boards and associations, and typically included sponsoring athletics (tournaments, equipment, clothing), academic fairs (science, technology, entrepreneurial), and media relations.

*"We are part of the G.M.M.A. ... have their own league for all their sports... but there are sponsors, so you will go to a championship game and you will have a*

*sponsor of the player of the game up. I believe that technically its illegal, but it's done.*" – Participant #5 in speaking to indirect sponsorships.

*"Now that being said, there are things that, you know we took part in science fairs, and regional science fairs have sponsor. I mean that is the way that work; hugely important."* – Participant #2 is speaking to indirect sponsorships.

### **Exclusive Agreements**

Exclusive agreements, defined by Molnar (2005) as corporate contracts bearing specific rights to sell or promote specific products or services with the exclusion of competitors, are rarely observed or practiced within Montreal schools. School administrators indicated that it was no longer part of their fiscal responsibilities to engage in these types of contractual agreements. In the past, more experienced administrators noted a time when they had more prominent negotiating and contractual responsibilities. However, it has since been centralized to school boards officials.

In a time of fiscal restraint and the maximization of educational resources, it appears school board officials prefer to manage exclusive agreements and service contracts jointly. Within this, they can more appropriately advocate for purchasing larger volumes which gives school boards greater negotiating and purchasing power, thus subsequently lowering per resource cost.

*"It's a volume business. They group all the school boards into a purchasing plan and they use that to negotiate; and that is why we are not allowed to purchase apple products anymore. Because apple refuses to give volume discounts and the M.E.L.S has said, that's it, we will not purchase anything."* –Participant #3 in speaking to the purchasing of educational resources by volume.

Interestingly, the majority of potential exclusive agreements and/or service contracts are now being managed in such a manner. Many educational resources are now being purchased in this method. Examples include technology, caretaking supplies, photocopying, office supplies, clothing, travel and telecommunications. Administrators also note that these negotiated exclusive agreements and service contracts do save schools considerable resources. However, at times, they can become frustrating, when wanting to purchase specialized resources, such as in science, vocational or technology programs.

*“People have made those efforts and we’ve benefited but if you want a particular product which teachers are very very good at saying, no no I don’t want that one, I need this one, well then you get frustrated by the system.” – Participant #5 in speaking to frustrations purchasing specialized equipment.*

## **Appropriation of Space**

The appropriation of space is defined by Molnar (2005) as the allocation of school space for corporate logos and/or advertising messages. In Quebec, very pointed legislature was created curtailing advertising to children and this was known, respected and reiterated by school administrators during the study. Thus, as expected, few corporate advertising practices were observed or exercised by school administrators. Innovatively, the school administrators who were engaged in some minor forms of corporate advertising, did so carefully, technically targeting parents, staffs, or community members exclusively. Such commercial practices included adding local business logos to school performance pamphlets/programs, allowing advertisements on specific school webpages or staff mailboxes, and noting corporate logos on sports uniforms.

*“I’ll tell you were we get most... if we are having an event or drama production, there will be sponsorship in the program, generally those are parents or community groups that will advertise in the program. Then again, the people watching the plays are generally parents and not students. But yes, we do receive some of that; Physio-clinic is one of them. But there is some. I can’t deny that.” – Participant #3 in speaking to the allocation of advertising for drama productions.*

In rare cases, some administrators did note participating in reviews for explicit advertising proposals; however these were all subsequently rejected within their review. The two most prominent proposals included the installation of electronic monitors, similar to those found in subway and airport terminals, in school hallways. These monitors would display programming tailored to the school culture, including student work, announcements and messages. They would, however, also display non-commercial advertising. The second proposal included the installation of a commercial billboard on top of the school roof. This school was strategically located within the city, and would offer considerable advertising traffic.

Other administrators with elementary school experience, similarly remarked that Scholastic flyers, touted as having considerable history within Montreal schools, was probably the most explicit form of corporate advertising in the school. To respect consumer law,

Scholastic flyers should be delivered to parents in sealed envelopes via students. This however is a theoretical practice and “enveloping” flyers is rarely observed.

Administrators also remarked that there still exists a continued practice of indirect advertising to students by participation in sponsored events such as athletic tournaments, science/entrepreneurial fairs, or when businesses host extra-curricular activities at their place of work. At these events, companies have their names, logos or advertising messages on display subsequently expanding their marketing reach. These forms of advertisements are illegal under the Consumer Protection if they are directing their messages at children. Nonetheless, the practice still occurs.

Non-corporate advertising was more frequently observed by the school administrators. This advertising is marketing initiated by organizations, associations, and/or specific programs. It focuses less on securing profit than reinforcing messages. This slight deviation, focusing away from profits to reinforcing messages, is equally impactful on students and thus was included in this study.

Non-corporate advertising is centrally monitored by school administrators, sometimes including governing boards, and typically included charity, awareness or community campaigns such as the Heart and Stroke Foundation, Movember, Terry Fox runs, human trafficking, etc. Varying in the amount of solicitation each received for participation, administrators noted considerable personal ethical reflections in deciding which campaigns to engage with and which to mobilize resources.

*“Yes, I look at the situation, is this in the best interest for the child, always; best interest of the school and are we doing a good deed for the community.” – Participant #2 in speaking to their personal reflection.*

*“I had examples of people asking me to fund a particular charity, in doing the research we found that the charity could be linked to funding terrorist organizations.” – Participant #3 in speaking to proper deliberation behind charitable request.*

## **Digital Marketing**

Digital marketing involves providing electronic equipment or programming with input of content to schools. It was the least frequent commercial practice observed or exercised by school administrators. Influencing factors such as technological competencies of school leaderships and

the availability of resources to further develop technologically varied significantly from school to school; and thus might have accounted for its disparity. Only two real tangible examples of digital marketing were identified amongst the administrators. One rejected proposal involved the installation of digital monitors in school hallways, as discussed earlier. The second was a request to sell school merchandise on the school websites.

With a vast majority of digital equipment and software being filtered through government and school board networks and officials, there has not yet been the opportunity for school administrators to engage in digital marketing practiced as described by Molnar. Secondly, all administrators did note a serious and ongoing concern regarding teaching student's appropriate uses of technology, digital citizenships and technology trends progressing forward. This ethical positioning, may too explain the absence of digital marketing within Montreal schools.

*“So that I think is the greatest concern, I think that is the greatest concern amongst many administrators....And some are very, very destructing, very harmful. Yeah, really take no account into people's feelings and lasting of and what kids perceive sometimes as being the anonymity of it makes it even worst. In the end we always find out who it is but that is one of the worst things out there right now.”* – Participant #5 in speaking to the observed behaviors of students in the digital realm and on social media.

There is sufficient evidence from this study to conclude that commercial practices do exist in Montreal schools. These commercial practices however do not appear to stem, as Molnar would expect, from a corporate access of the educational system, but from an internal financial re-adjustment. As an administrator noted, they simply do not feel the corporate pressure or accountability to engage in commercial practices as described by Molnar. In hindsight, the current fiscal landscapes, topped with budgetary restrictions and compressions, compounded with increased educational needs and expectations, do instill enough pressure amongst school administrators to cause an active seeking out of resources, implement financial management systems, and/or to create partnerships to secure additional resources. It is within these activities that the current educational commercial practices are being performed.

### **The Importance of the Ethical Educational Leadership**

It is overwhelmingly clear, that all of the participating administrators, over abundantly value student success and wellbeing, supported their staffs, and care greatly about their

profession and educational systems. Decisions about commercial practices were engaged passionately, collaboratively and introspectively. Managerial responsibilities were seen to necessarily include sound ethical judgement and any explicit or implicit effects of commercial practices undertaken were managed, mitigated, and accounted for.

The required professional capacities of school administrators to navigate the ethically gray landscapes of school leaderships, including school finance, commercialism and school governance, are by no means accidental or wistful. School administrators noted many essential competencies in their implementation of their leadership strategies towards commercialism and education and three equally significant, overlapping competency classifications were created: essential knowledge, professional skills, and personal attributes.

### **Essential Knowledge and Commercial Practices**

Essential knowledge is that which allows administrators to fulfill their respective responsibilities. Being accountable to many different stakeholders, and situated centrally within the hierarchy of the educational system, school administrators are positioned to both acquire and synthesize vast amounts of information. Beginning at the top of the educational hierarchy, administrators need to have an understanding of various ministerial policies. These might include relevant educational and consumer legislature, but also province-wide strategic plans.

*“We are very careful with that, because the law in Quebec, says you cannot advertise to a child under the age of 14. Given that we have grades 7-11, that includes us. There is no way we can advertise to exclude the areas from our grade 7s.”* – Participant #3 in speaking to their understanding of Quebec consumer law.

*“Well in the law, there are a few parent groups, there is the governing boards, who’s mandate is governance over the school, and you have parent advisory (PAC) or some schools will call it PPO, parent participation organization, and their mandate is given to them by the governing board, and some years they will be active and other years they won’t.”* – Participant #4 in speaking to the lawful organization of school governance.

As highlighted within participant experiences, at the school board, administrators need to grasp school board strategic plans, specific board policies and contractual agreements.

*“If you’re going to charge for that, if you’re going to charge for that photocopying, what it should be is that you’re making booklets for kids, consumables that they get to keep.”* – Participant #5 – in speaking to school board policy for charging for consumables.

They must also have an in depth understanding of their respective staff rights and responsibilities, including understanding their union policies, procedures and collective agreements. Administrators need to have firm comprehension of their specific school educational plans, the needs and expectations of their school, school cultures and values, local school policies and professional capacities. They should understand the governance of their governing boards as well as their respective aims, strategic goals and values, especially with respect to commercialism. They must also be familiar with local societal and community consumer trends; as they have a direct influence on their school, students and staffs.

As remarked by participant reflections, administrators need to reflect and understand themselves and their role. They should be comfortable within their own professional responsibilities, their own personal values and the culture they bring to their school. This again is especially important with respect to commercial practices. They should also have developed an understanding of their staffs, professionally and personally.

Lastly, as participants spoke to their responsibilities they noted, administrators must personally be literate and informed in a variety of fields. As expected, these included educational pedagogy, literacy, technology, multiculturalism, and science, to name a few but also economics, consumerism, and finance. Administrators are required to be extremely knowledgeable professionals with a vast array of expertise.

### **Professional Commercial Skills in Education**

As previously explored, commercial practices have the capacity to be integrated within many aspects of the school community culture and thus in examining which professional skills were required to address them, administrators identified a wide array of skills. These skills were subsequently grouped within the five categories. They include: (1) creating a caring, safe, respectful and inclusive learning environment, (2) planning, preparing and assessing to engage students and progress while applying creativity and innovation in teaching and learning, (3)

communicating effectively to build positive relationships, (4) creating a climate of high expectations, and (5) carrying out any other professional responsibilities.

Perhaps the most perceivable to stakeholders, creating a caring, safe, respectful and inclusive learning environment is extremely important. Within this, administrators noted managing and supervising the school environment, students, programs and resources. They also noted the importance of being able to identify and mitigate influential factors, practices or people challenging the accepted school values. In relating to commercial practices, this was often considered challenging and was at the forefront of their personal reflections. Administrators also wanted to offer diverse opportunities to their students but struggled in doing so at the cost of indoctrination or reinforcing consumer values. To them, a safe and respectful environment was one free from both explicit and implicit harms.

*“... I did have somebody come in who had very clashing sets of ethics. And he didn't stay, he didn't stay in administration. It wasn't a very nice thing. I had to due process him and unfortunately, it needed to be done. But you know, you don't pick people who you don't think will have to moral fortitude...”* – Participant #2 in speaking to the challenging nature of removing a colleague for the betterment of the school.

As a school principal, an individual carries the primary and presiding role of an educational leader. More than middle managers in charge of resources and personal, they require strong pedagogic competencies including planning, preparing and assessing to engage students, as well as applying creativity and innovation in teaching and learning. In their supervision of school pedagogy, they must create strategic plans for further improvements and foster a fundamental desire for learning. These sometimes involved the creation of intervening strategies, programs or partnerships, which at their bottom line, costs additional resources.

*“Those we look at all the facts, it really speaking numbers, so we look at what was the passing rate in science, what was the passing rate in history, math, so we look at all those numbers and then I meet with my departments. I said this is what we have; this is what we need to be better. So if each department sets up something were they are looking at 1% increase, then if everybody does their job, then the 86% can become 87%, 88%.”* – Participant #2 in speaking to collaborating with staff to develop strategic plans for student success.

School administrators must be able to maintain organizations, foster perseverance, be adaptive to change and be able to take on new projects as they arise. For an administrator, this requires continually learning new skills and developing professionally all the while doing more with fewer resources.

Administrators are also a public figure with many responsibilities and accountabilities. It is important that they communicate effectively to build positive relationships. School administrators must foster links with a multitude of individuals within the school community; school partners, student families, professional staffs, and governing boards are all regularly engaged. They must be able to carry out both easy and challenging conversations, negotiate concerns and needs, determine motivating factors, and actively listen and work collaboratively.

*“So it was something we really talked about a lot at governing board and I have to say it was something I discouraged them from doing because we did have families that I know that was going to make a difference”* – Participant #2 in speaking to advocating not for charging all students a blanket fee for school yearbooks.

*“So listening to everyone, and then debating, discussing, we have consultative groups, we have a school council that meets at least every month, we have staff meetings, we have governing boards, so I think that we start with a basic understanding...”* – Participant #4 in speaking to the value of openly communicating in their commercial leadership.

Effective administrators are not solo in their leaderships; they build teams, systemic capacities and professional networks all to achieve their school visions. This clear communication is never more important than when engaging with outside partners or programs that may or may not have the same motivations behind their engagements. Clear communication increases efficiency, outlines expectations and mitigates potential commercial problems or harms proactively.

Creating and maintaining a climate of high expectations might be the most arduous responsibility an administrator has to face. They must be vigilant in the identification and mitigation of individual, professional and systemic fatigue continually challenging school effectiveness. When engaging in a commercial practice, they must maintain its expectations and when engaging with partners, ensure they too meet the heightened school climate. An administrator must also be able to balance personal and professional workloads, overcome

challenging situations and be resilient to impeding politics, stereotypes, unprofessionalism and generalizations. They must stay true to their vision and realize its fulfillment.

*“..you always have to hold your school to the highest standards, not you’re lowest. Cause it’s a slippery slope.”* – Participant #4 in speaking to a climate of high expectations.

*“And I think that has to do with a couple of things. One is the values that the school embraces; I guess we tend to be a little bit more conservative than liberal. When it comes to discipline and expectations you know the bar is always here (\*raising hand indicating – high expectations), it’s not midrange.”* – Participant #3 in speaking to school expectations and success.

As all administrators noted within the study, school expectations are high but there is always room to grow and improve.

Lastly, an administrator’s role is dynamic, fluid, and every changing. As exemplified, schools are can become very busy places with many different programs, activities, events and functions occurring at any one time. School administrators must maintain their essential daily operations as well as carry out any other professional responsibilities such as the financial management of their school budgets. Many of these responsibilities are themselves critical, however are not often considered until after engaging within the profession.

The above overlapping categories of professional skills by no means are a complete description all of the professional skills required of a school administrator; that list is vast and expansive. It would also include various localised contexts, where more specific skills such as vocational or cultural assets can be equally as important. However, it does attempt to portray the main reflected professional skills perceived by administrators in the effective management of commercial and financial practices within Montreal schools.

### **Personal Attributes of Ethical Commercial Practices**

Lastly, effective educational leadership is as much about moving forward with others as it is in direction. Leaders must open themselves both visibly and vulnerably. It is through this interpersonal revealing that they will gain the trust and respect of others.

*“Because I think you have to, particularly with our community, you have to show trust too, you know, it’s not meant to be bureaucratic to the point of we are*

*strangers we don't know each other, so everything has to be spelled out, it has to be sort of a collegiality, with the community.”* – Participant #1 in speaking to building trust within the community to move visions forward.

Although, personal attributes can vary from administrator to administrator, overall school administrators do exhibit considerable paralleling attributes in managing commercial practices. In working with an identified vulnerable member of society, children, administrators must be caring, nurturing, empathetic and sensitive.

*“I think that by our nature, educators give tremendous amount. Teachers buy supplies with their own money, teachers feed kids, teachers pay for field trips for kids, so I think, if you quantify all that it would be an incredible amount.”* – Participant 3 in speaking to the nurturing demeanor of educators.

As their profession and engaging in commercial practices requires numerous roles and responsibilities, administrators must be motivated, quick-learners, responsible and respectful. Carrying a fundamental vision of student success and wellbeing, school administrators understand that this goal must be attained and has serious consequences if it is not. As noted by the participants, bottom line profits or consumer values cannot be a goal in public education. Administrators must also be organized, reliable, and results driven. They work in a realm of ethical gray paradoxes occurring on a daily basis and the emergence of continued commercial practices only challenges their leaderships further.

*“I think we are put in a leadership role in part because of our judgement and if you make decisions based on the best interest of the kids, you'll never make the wrong decision. Ok, somebody may not agree with it, the law might not agree with it, but if it's the best thing for the child, then I think it's the right decision...”* – Participant #4 in speaking to the foundation of educational leadership.

Lastly, administrator decision making processes are rarely simple, affect many stakeholders and can be physically, emotionally and mentally taxing. From this, administrators must be courageous, resilient, ethical, reflective and demonstrate good judgement.

## **Conclusion**

In this chapter, I identified and expanded on this study's data analysis approach, the constant comparative analysis. I presented the emerging themes from the study and the

methodical reasoning's for their discovery and generation. They include the increasing societal and systemic expectations placed on schools and school administrators, the observance of commercial practices in Montreal schools and the importance of the ethical educational leader. In the conclusion, I provide an overview of theory generation, its conceptual schema of findings, reflections on limitations and propose implications for relevant stakeholders and future research.

## Conclusions

As previously described, this study embodied a grounded theory research design to examine the commercial perceptions and practices of Montreal school administrators. I investigated the financial situation of their schools, what commercial practices are most common, their significance, and what philosophical foundations ground their leadership. The result of this process was a theory generation conceptualized and expanded below.

### A Conceptual Model of the Integration of Categories

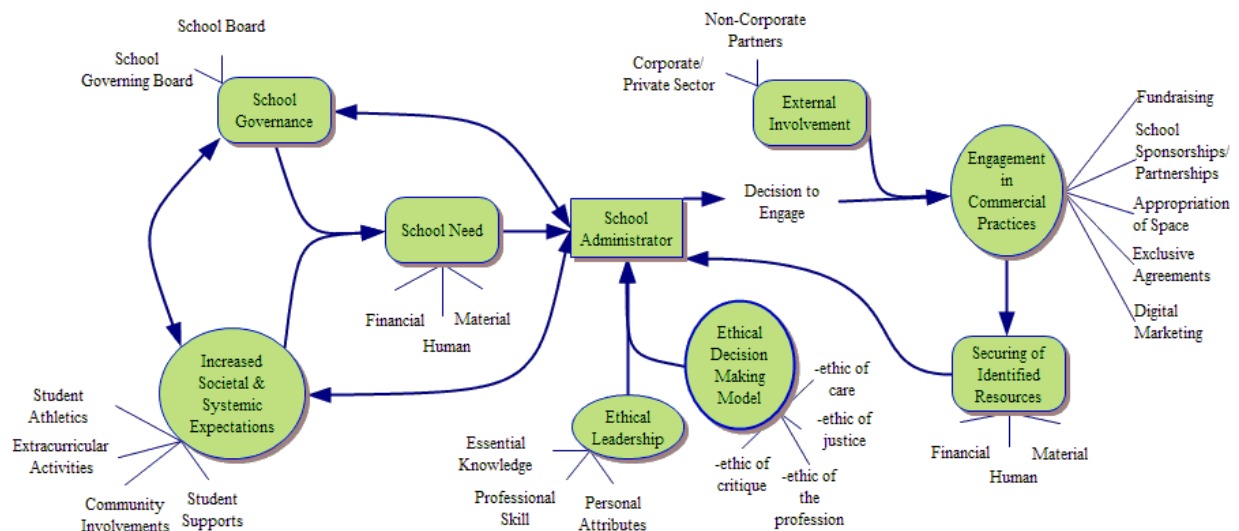


Figure 1: Theory Generation – Developing Educational Commercial Practices

The conceptual model in Figure 1 illustrates how commercial practices are initiated and perceived by Montreal school administrators. When school administrators are faced with increased societal and systemic expectation, and/or financial compressions, they initiate a process of deliberation which takes into account complex ethical considerations. In weighing organizational benefits, competencies and capacities of the school and personnel, as well as personal and organizational values, potential solutions are communicated back to school governance. If a commercial solution is appropriate and agreed upon, the school administrator begins the engagement process. In this process, the administrator sometimes seeks external involvement by business or external partners depending on the initial need. The goal of the

commercial actualization is to secure the identified resources, which in turn, is utilized by the school administrator to fulfil the identified initial need.

It is evident that school administrators find themselves in fiscally tight situations with limited budgets. Montreal educational systems have been experiencing financial reform with many administrators experiencing budgetary compressions. In their role as administrators, school principals are also responding to increased societal and systemic expectations; offering much in terms of additional student supports, athletics, extra- and co-curricular programming and community resources. They do this, while weighing school needs, expectations and fiscal integrity.

Data analysis established the criticality of their ethical leadership while considering these needs, expectations and fiscal integrity. Educational leadership involves facing important ethical challenges and these challenges are increasingly taxing when stressors such as fiscal instability, conflicting moral values, and obscure student harms challenge the realisations of school visions. When addressing an identified school need, administrators contemplated potential solutions based on the essential knowledge available to them (laws, strategic plans, agreements, various levels of governance, pedagogy, etc.). They utilized specialised skillsets such as creating a caring, safe, respectful and inclusive learning environment, communicating effectively to build positive relationships and creating a climate of high expectations to ensure any commercial practice did not compromise their school visions. Lastly they relied upon their personal attributes (nurturing, motivated, organized, courageous, resilient, demonstrated good judgement) to see a successful actualization and completion of a commercial practice. Through these professional competencies, an administrator was able to ethically mitigate, manage and account for their respective commercial practices.

As school administration is a position of moral authority and commercial practices often display consumer-based values not traditionally seen in educational environments; the ethical integrity of the participating administrators was also examined. As previously discussed within the literature review, student success and wellbeing is a fundamental foundation of educational leadership. Within this study, all administrators maintained this ethical integrity by explicitly advocating for their students first and foremost. They subsequently prioritized the wellbeing of their staffs, educational stakeholders (parents, community members) and ministerial, school

board and local policy, respectively. From my interviews, it was clear that these administrators would never sacrifice or compromise student well-being in an effort to secure commercial funding.

*“Well to me, it has to be very clear, it has to have a clear benefit. It can’t have a supposed or hopeful benefit. And I’m not shy about shutting it down if it’s not. Sometimes you have to be a little more direct, you have to cut it a little bit more roughly for people to really understand; that you can’t push on this. Like this is my bottom line, and it has to be your moral compass.”* – Participant #1 in speaking to rejecting a commercial sponsorship with a local media business.

From this, I was also able to draw parallels to Starratt’s (1991) ethical decision making model previously discussed in the literature review. According to Shapiro and Stefkovich (2001); Starratt (1991), these administrators are continually considering –the ethic of the profession, in their decision making process. They are contemplating what their profession would expect and what is in the best interest of students to guide their commercial practices.

Central to this inquiry, was which and with what significance was commercial practices found within Montreal schools. In answering this, the data analysis revealed that all Montreal schools were engaging in some form of commercial practice. Schools attempting to maintain fiscal integrity, offer additional programming and meet evolving needs, is only achievable by proficient financial management and engaging in some form of commercial practices. Schools are receiving enough government allocations to cover essential educational services, however required collecting additional funds from student fees, fundraising, or sponsorships, or reducing expenditures with exclusive agreements and partnerships, to cover additional expenses or resource needs.

Within the examination of Molnar’s eight commercial practices found in educational systems, fundraising was easily the most prevalent commercial practice found within Montreal schools. Schools were observed engaging in a multitude of different fundraising activities including charging student fees, fundraising by student activities, procuring grants, parental and community fundraising, receiving explicit donations or creating school foundations. At the end of the scholastic year, this practice accounted for considerable financial contributions to a school’s budget. School sponsorships, including partnerships, accounted for the second most common commercial practice found in Montreal schools. Meeting a variety of different

scholastic needs, many different sponsorships provided the necessary resources (human, financial or material) and opportunities enabling the enrichment of many additional student programs or services. Lastly, due to the establishment of specific laws and policies, specific ethical foundations or a lack of technological resources or competencies, the commercial practices such as the appropriation of space and digital marketing were not seen with any significant frequency or magnitude.

Altogether, data analysis revealed that the commercial practices in the educational systems of Montreal are not stemming from a corporate or consumer-value driven pressure. There was no identifiable corporate influence on school governance and any accountability to local business was voluntary or in the spirit of community building. More appropriately, the vast majority of commercial practices engaged by school leaderships were due to a school need, financial, human or material. The current fiscal landscapes, topped with budgetary restrictions and compressions, compounded with increased educational needs and expectations, do instill enough pressure amongst school administrators to cause an active seeking out of resources, implement financial management systems, and/or to create partnerships to secure additional resources. It is within these activities that the current educational commercial practices are being performed.

### **Limitations of the Study**

Some of the potential limitations of the study include: sample size, the use of self-reported data and cultural and language biases.

#### **Sample Size**

As discussed in Chapter Two, five secondary school administrators of Montreal agreed to participate in this study. In noting the considerable time, efforts and resources used to conduct multiple interviews, transcribe lengthy interviews and analyze the data through the constant comparative method, this seemed a reasonable amount for a Master's thesis. In this, I also believe that rich descriptions were captured and saturation points of emerging themes reached. In hypothesizing for future research, I believe it important to consider the incorporation of school governing board members and school board officials.

As noted within the study, school governance is a collaborative activity performed via many stakeholders. Although, school administrators are most centrally positioned and hold

considerable influence, the perspectives of other governing members would offer valuable insight into the incorporation of educational commercial practices.

In his grounded theory research guidelines, Creswell (2007) also offered a sample size recommendation of twenty to thirty participants for interview based studies. I believe this to be excessive for this study. In looking forward, I would suggest an ideal sample size consisting of five school administrators, five active school governing board members and five school board officials.

### **The Use of Self-Reported Data**

The use of self-reported data within a methodology so strongly emphasizing strong data as a means of theory discovery or generation can offer potential limitations to the study. According to Brutus (2013), self-reported data potentially contains sources of biases that should be noted as limitations including selective memory (remembering or not remembers certain facts), telescoping (recalling events that occurred at one point of time incorrectly), attribution (marking credit for positive events and assigning negative events to external factors) and exaggeration (embellishing outcomes).

In this account, I maintain my data and emerging themes to be trustworthy. The researcher has to create the trustworthy environment for participants, accept interview data at face value, and use analyzing techniques which both strengthen and support interpretations. I also believe the meticulously thorough methodology of the constant comparative analysis also prevented an overanalyzing of the biases noted above. I believe it circumvented selective memory, telescoping, attribution and exaggeration by remaining focused on meanings and perspectives instead of detailed specifics.

### **Cultural and Language Biases**

With the two noted limitations above being methodological; the last limitation is personal (researcher). Montreal is a diverse, multicultural city however is situated within the province of Quebec that is governed by two main cultures, “the Francophone Quebec” (majority) and “the Anglophone Quebec” (minority). As mentioned within Chapter Two, this study situated itself, due to the researchers’ own language competency (native English speaker) within English speaking school boards; thus, in a minority representation of the population.

To account for this, I did actively seek guidance and insight from four peer debriefers from the francophone educational community as well as completing superficial database searches for relevant research and publications conducted in French. However, this again, noting my own language capacity remained as supporting data. Although, this limitation does not directly affect the achieved results of this study, in looking forward towards potential future research, an account of commercial practices, including discrepancies, within the francophone school systems would be incredibly insightful.

## **Implications**

In the following subsection, I present the implications this study has brought forth for future research, pedagogy and policy. Emerging out of three distinct themes, the study of commercialism in education field from a Canadian perspective, educational leadership, and educational governance. I offer these reflective discussions and suggestions for future research.

## **The Canadian Commercialism in Education Field**

This study exposed a real need for qualitative research and for research that examines Canadian perspectives to commercialism in education. As noted within the literature review, the research conducted to date is primarily quantitative. It lacks the important rich descriptions, meanings and contexts. To me, these absences steadily reinforces the importance of utilizing qualitative research methodology to further support and move the commercialism in education dialogue forward.

Continued North American publications stem largely from an American perspective with a vast majority emerging from the Commercialism in Education Research Unit from the University of Colorado Boulder (Molnar, 2014). This research unit, focused on school commercialism, appears to be the only one in North America, perhaps the World. Notwithstanding, with one collaborative national survey (Froese-Germain et al., 2006) and works by Norris (2011), the Canadian perspective has not been thoroughly investigated. Philosophically, although similarities do exist between Canadian and American educational systems, it is hardly substantive enough to postulate it as being completely transferable. This study, attempted to remedy this by establish a Canadian perspective from the Montreal educational landscape.

## **Educational Leadership**

This study also suggests meaningful implications for educational leadership both current and future. For practicing administrators, it highlights a real need to be reflective in their practices in accordance with commercial practices and financial management. They should be engaging meaningfully within a moral valuation process, recognizing potential impacts, elaborating outcomes and framing courses of action. Appropriate reflective time should also be implemented when engaging with external partners or associations. It is up to the school administrator, in collaboration with the governing board, to identify potentially obscure or harmful motivations. Practicing administrators must also be forthright within their consultations and communications. Engaging in a commercial practice is an ethical gray and potentially challenging situation with multiple stakeholders and outcomes. It would be irresponsible for an administrator to continually engage in commercial governance alone.

This study also marked further implications for pre-service administrators and training programs. As mentioned throughout this study, educational leadership is ethical in nature. Administrators continually rely on their personal values and past-experiences to establish good-judgement in their decision making process. However, do they have the requisite background in ethics to make sound decisions, to communicate those decisions effectively and to feel confident about those decisions? Thus, commercialism and ethics should be substantially addressed within teacher and administrator education programs. This is all the more important in the Quebec context, considering the Ministère de l'Éducation, du Loisir et du Sport requires that teacher education programs develop an ethics competency (Martinet, Raymond, & Clermont, 2001).

A lack of ethical leadership and financial management training was also disclosed by all participants. None had any ethical educational leadership training and many highlighted their parents and past experiences for establishing their philosophical foundations. Equally, none were officially trained in school financial management; they relied heavily on their personal practices or on-the-fly impromptu training. In noting this, a critical reflection on pre-service training programs should be undertaken.

## **Educational Governance**

This study also suggests serious implications for educational governance at both the school board and ministerial levels. School administrators find professional satisfaction in student success and wellbeing. When confronted with an ethically challenging choice, all participants chose student wellbeing; regardless of policy. Although never ignorant to established policy, school administrators “erred” towards student success and well-being. This raises questions about the value and effectiveness of school policy. Is the existing policy adequate? Does it address the ethical challenges faced by school administrators?

The findings of the study indicate that current policies do not address the real life ethical challenges faced by administrators. This deficiency, compounded with the reality that most administrators do not receive formation in commercialism and ethics, only solidifies the importance of developing clear and substantive policies that guide an administrator’s work. Ethical challenges are vast, dynamic, and situational. Investing in a comprehensive commercial policy document could serve as a critical point of reference for discussion ethical dilemmas with educational stakeholders. Comprehensive commercial policies would also have the power to both enhance and facilitate the collaborative nature of the administrator’s work. Thus, a further critical reflection on ministerial and school board policy should also be undertaken.



McGill University

**ETHICS REVIEW  
RENEWAL REQUEST/STUDY CLOSURE FORM**

Continuing review of research involving humans requires, at a minimum, the submission of an annual status report to the REB. This form must be completed to request renewal of ethics approval. If a renewal is not received before the expiry date, the project is considered no longer approved and no further research activity may be conducted. When a project has been completed, this form can also be used to officially close the study. To avoid expired approvals and, in the case of funded projects, the freezing of funds, this form should be returned 2-3 weeks before the current approval expires.

**REB File #:** 451-0413  
**Project Title:** Philosophical Rationales on Commercialism in Education  
**Principal Investigator/Department:** Christopher Turnbull/ Department of Integrated Studies in Education  
**Email:** [Christopher.turnbull@mail.mcgill.ca](mailto:Christopher.turnbull@mail.mcgill.ca)  
**Faculty Supervisor (If student is the PI):** Ronald Morris

1. Were there any significant changes made to this research project that have any ethical implications? ☐ Yes ☒ No  
 If yes, and these have not already been reported to the REB, describe these changes and append any relevant documents that have been revised.
2. Are there any ethical concerns that arose during the course of this research? ☐ Yes ☒ No. If yes, please describe.
3. Have any participants experienced any unanticipated issues or adverse events in connection with this research project?  
☐ Yes ☒ No  
 If yes, please describe.
4. Is this a funded study? ☐ Yes ☒ No.  
 List the agency name and project title and the Principal Investigator of the award. If not yourself. This information is necessary to ensure compliance with agency requirements and that there is no interruption in funds.

☒ Check here if this is a request for renewal of ethics approval.

Submit to Lynda McNeil ([lynda.mcnell@mail.mcgill.ca](mailto:lynda.mcnell@mail.mcgill.ca)), Research Ethics Officer, James Administration Building, 845 Sherbrooke Street West suite 429, MtL, QC H3A0G4; fax: 398-4644 tel: 398-6831. Electronic submissions with scanned signatures are accepted but must come from the PI's McGill email.

(version 12/12)

Figure 3: Renewal Certificate of Ethical Acceptability of Research Involving Humans

## Appendices B: Informed Consent Form



**Christopher Turnbull**  
Master of Arts – Educational Leadership  
[christopher.turnbull@mail.mcgill.ca](mailto:christopher.turnbull@mail.mcgill.ca)

May 29, 2013

### RE: INVITATION TO PARTICIPATE

Dear XXXXXXXXXXXX,

This letter is an invitation to consider participating in a study I am conducting as part of my Master's of Arts degree in the Department of Integrated Studies at McGill University under the supervision of Dr. Ronald Morris. I would like to provide you with more information about this project and what your involvement would entail if you decide to take part.

As the global and Canadian economies continue to evolve, governing bodies are responding with fiscal restraints and careful spending. This economic situation is having a trickle-down effect through all forms of government spending and is being observed in the Canadian public school systems as tightening of budgets and reform. Schools, under the direction of governing boards and educational leadership, are continuing to provide diverse educational programs; however, are faced with the difficult task of funding these programs and balancing school budgets. To do so, this sometimes requires involving external funding from the Canadian private sector or third-party funders. These "equalizing situations" are leaving provincial and territorial education systems vulnerable to commercial influence.

The growing concerns by educational stakeholders about changing economies, government allocations and educational finance creates challenging decision making paradigms which the educational leadership must navigate. Research is concurrently identifying potential outcomes of commercialism in education however yet to be identified are the experiential and philosophical rationales of those strategic individuals who allow or disapprove of commercial influence in education. Thus this study can be used to complete a more comprehensive analysis of commercialism in education by providing the interpretations to support the existing quantitative analysis. The purpose of this study will therefore be to discern experiential and philosophical rationales amongst educational leaders about commercialism in education.

In the broad context of this proposed research, the study can be viewed as how the experience and philosophies of educational leaders affects commercial influence on education. Interviews will focus on specific thematic questions designed to reflect on experiences and philosophies behind the decision making processes regarding commercial opportunities and influences in education. The open-ended questions, such as "how" and "why" will focus on the major commercial opportunities in education, such as appropriation of space (advertising), partnerships & sponsorships, curriculum & classroom supplements, user fees and fundraising. Analogous to this are sub-questions about what extent, if any, do educational leaders struggle with commercial influence and how do educational leaders decide within their autonomy the appropriateness of additional funding sources?

Therefore, I would like to include your valued and diverse experience as one of several individuals to be involved in my study. I believe that because you provide leadership for your school and are actively involved in the management of educational resources, you are best suited to speak to the various issues facing educational administration and commercialism.

Figure 4: Informed Consent Form for Participants (1 of 3)



**Christopher Turnbull**  
Master of Arts – Educational Leadership  
[christopher.turnbull@mail.mcgill.ca](mailto:christopher.turnbull@mail.mcgill.ca)

Therefore, I would like to include your valued and diverse experience as one of several individuals to be involved in my study. I believe that because you provide leadership for your school and are actively involved in the management of educational resources, you are best suited to speak to the various issues facing educational administration and commercialism.

Participation in this study is voluntary. It will involve two interviews (over the course of a year) of approximately 60 minutes in length to take place in a mutually agreed upon location.

- You may decline to answer any of the interview questions if you so wish.
- Further, you may decide to withdraw from this study at any time without any reservations or negative consequences by advising me, the researcher.
- With your permission, the interview will be audio recorded to facilitate collection of information, and later transcribed for analysis.
- Shortly after the interview has been completed, I will send you a copy of the transcript to give you an opportunity to confirm the accuracy of our conversation and to add or clarify any points that you wish.
- All information you provide is considered completely confidential.
- Your name, the name of your school and school board will not appear in any thesis or report resulting from this study.
- Data collected during this study will be retained for eighteen (18) months on a secure password protected computer while I complete the written thesis.
- There are no known or anticipated risks to you as a participant in this study.
- Only I, as primary researcher and the associated Supervisor with this project will have access to data.

If you have any questions regarding this study, or would like additional information to assist you in reaching a decision about participation, please contact me at 1-514-434-8020 or by email at [christopher.turnbull@mail.mcgill.ca](mailto:christopher.turnbull@mail.mcgill.ca). You can also contact my supervisor, *Professor Dr. Ronald Morris* at 514-398-6971 or email [ronald.morris@mcgill.ca](mailto:ronald.morris@mcgill.ca)

I would like to assure you that this study has been reviewed and received ethics clearance through the Research Ethics Board (REB) office at McGill University. However, the final decision about participation is yours. If you have any comments or concerns resulting from your participation in this study, please contact *Lynda McNeil* in the Research Ethics Board (REB) at 1-514-398-6831, or [lynda.mcneil@mcgill.ca](mailto:lynda.mcneil@mcgill.ca).

I very much look forward to speaking with you and thank you in advance for your assistance in this project.

Warmly,

Student Researcher,  
McGill University

Figure 5: Informed Consent Form for Participants (2 of 3)



**Christopher Turnbull**  
Master of Arts – Educational Leadership  
christopher.turnbull@mail.mcgill.ca

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### CONSENT

By signing this consent form, you are not waiving your legal rights or releasing the investigator(s) or involved institution(s) from their legal and professional responsibilities. As a participant you will be provided a copy of this consent form for your own records.

---

With full knowledge of all foregoing, I agree, of my own free will, to participate in this study.

I agree to have my interview audio recorded.

☐ YES ☐ NO

Date: \_\_\_\_\_

Participant Name: \_\_\_\_\_ (Please print)

Participant Signature: \_\_\_\_\_

Figure 6: Informed Consent Form for Participants (3 of 3)

## Appendices C: Participant Interview Protocol

Interview Guide

\*Prior to beginning, review nature of study and research ethics.

Exploratory Questions

1. Participant Demographics:
  - a. Who are you? What is your position?
  - b. Can you speak to the size and culture of your school and community?
  - c. How would you describe your student population?
2. Commercial Practices and School Finance:
  - a. What financial situations are you finding your school in?
  - b. How frequently are you seeking out funding, if any?
  - c. Is there a commercial presence in your or Montreal schools?
  - d. How significant an issue is commercialism in schools?
  - e. Can you speak to the process of beginning a commercial practice? Is there an established policy? What bureaucracy?
  - f. What types of commercial practices is your school involved with or have you noticed?
    - i. What are your views towards the appropriation of school space?
      1. What criteria would it have to meet in order to be approved or rejected?
    - ii. What are your views towards sponsorships?
      1. With sports teams, for school trips, for school clubs, for professional development of staff?
      2. What criterion is involved?
    - iii. What are your views towards curriculum or classroom supplements?
      1. Is there a review process prior to implementation?
      2. Is there an on-going review?
      3. Is there consultation during the creation process?
    - iv. What are your views towards school fees?
      1. What fees are you currently charging?
      2. How are you determining this value?
    - v. What are your views towards fundraising?
      1. Is it taking place now within your school?
      2. How did you determine or approve which fundraising you would do, if any?
      3. What expectations do you have towards the external partners?
    - vi. What are your views towards digital marketing?
      1. Is it taking place now within your school?
      2. How are you determining its value?
3. Philosophies, View and Reaction
  - a. Can you speak to your general views towards commercialism in education?
  - b. As a principal, are commercial practices or school finance something you struggle with?
  - c. Are there benefits to being involved in commercial practices?
  - d. Are there consequences to being involved in commercial practices?
  - e. What does a Principal think about during the decision making process towards commercial practices?
  - f. Are there others involved?

Figure 7: Evolving Interview Guide

## Appendices D: Summary Table of Commercial Practices in Education

<b>Eight Commercial Practices in Education (Molnar &amp; Morales, 2000)</b>			
	<b>Commercial Practice</b>	<b>Definition</b>	<b>Educational Example(s) of Commercial Practice</b>
1	<b>Sponsorship of School Program</b>	Corporate sponsorship or subsidizing of events, contest, entertainment, and equipment.	<ul style="list-style-type: none"> <li>- Channel One (American) or Youth News Network (Canadian) whom gives participating schools a satellite disks and television monitors that cycles news segments and youth advertising (Norris, 2011; Robertson, 1998).</li> <li>- Kellogg's sponsors school breakfast programs and Rice Krispies art sculptures projects (Norris, 2011; Robertson, 1998).</li> <li>- BusRadio offers sound equipment and programming with advertising to school boards free in exchange for air time (Norris, 2011).</li> </ul>
2	<b>Exclusive Agreements</b>	Corporate contracts bearing specific rights such as right to sell or promote specific products or services and the exclusion of competitors.	-School Properties is a firm that brokers with sports companies (Nike/Reebok) for school sports gear; uniforms, bags, shoes, backboards (Robertson, 1998).
3	<b>Sponsorship of Incentive Programs</b>	Programs that provide money, goods, or services when subjects perform a specified activity.	- Pizza Hut's " <i>Book It</i> " program offers pizza reward certificates for reaching literacy goals (Robertson, 1998).
4	<b>Appropriation of Space on School Property</b>	Allocating school space for corporate logos and/or advertising messages.	- Scholastic Book Clubs that promote schools giving advertising flyers to students and obtain rewards for purchases made ("Scholastic Canada," 2014).
5	<b>Sponsorship of Supplementary Educational Materials</b>	Materials created and provided to schools by corporations claiming to have instructional value.	<ul style="list-style-type: none"> <li>- A nutrition unit sponsored by the Dole Food Company (Robertson, 1998).</li> <li>- DeBeers "<i>Books In Homes</i>" supplies 3 books to all staff and students to some Northern NWT Communities (Kruger, 2014).</li> <li>- Campbell's Soups prepared science lessons aimed at viscosity</li> </ul>

<b>Eight Commercial Practices in Education (Molnar &amp; Morales, 2000)</b>			
	<b>Commercial Practice</b>	<b>Definition</b>	<b>Educational Example(s) of Commercial Practice</b>
			curriculum (Norris, 2011).
6	<b>Fundraising</b>	Schools, organizations, or corporations selling or auctioning products, services or marketing to subjects in return for a financial contribution.	- Fundraising activities may include such as walk-a-thons, bike-a-thons, selling products or services, door-to-door vending, school pictures, bottle drives, car washes, raffles, auctions, lotteries, student council activities (Froese-Germain et al., 2006).
7	<b>Privatization (excluded)</b>	Management of school or school programs by for-profit corporations or other non-public entities.	- The creation of private or specialised schools. - School leaders outsourcing plant operations, transportation, food services, student supports, technology, maintenance and school upkeep to companies such as ServiceMaster Canada (Robertson, 1998) and Chartwells ("Dine On Campus: Chartwells - Eat Learn Live Canada," 2014).
8	<b>Digital Marketing</b>	Providing electronic equipment or programming with input of content.	- ScreenAd, a computer screen saver that carries corporate advertising (Robertson, 1998). - Online site sponsors, electronic flyers and emails (Robertson, 1998).

Table 3: Table of eight commercial practices in education (Molnar & Morales, 2000, pp. 3-4)

## Appendices E: Conceptualization of Coding Progression

Conceptualization of Coding Progression				
	Initial Descriptive Codes	Axial Conceptual Codes	Axial Coding – Rules of Inclusion	Emerging Themes
1	Additional	Additional Student-Centered, School-wide or Community-lead Programs, Activities and Events	Statements will center on additional programs, activities or events will include student-centered activities, school-wide/staff-lead engagements or community and societal involvement beyond regular educational requirements.	Increasing societal and systemic expectations have notably added extra responsibilities and pressures onto schools and their corresponding administrations
2	Accomplishments			
3	Community	Community Culture, Governance and Reciprocity	Statements will center on community involvement with the school, the reciprocity of that relationship and its culture and governance.	
4	Family			
5	History			
6	Change			
7	Involvement			
8	Staff			
9	Motivation			
10	Need	Expectations, Needs and School Management Techniques	Statements will center on the expectations felt by administrators, their current school or community needs and specific techniques in overcoming them.	
11	Student Support			
12	Intervention			
13	Challenge			
14	Parents	Parental Impressions and Involvement	Statements will center on parental impressions of the educational systems, their involvement and communication with school administrators and	

Conceptualization of Coding Progression				
	Initial Descriptive Codes	Axial Conceptual Codes	Axial Coding – Rules of Inclusion	Emerging Themes
			their leadership.	
15	School Climate	School Climate Successes, Challenges and Engagements	Statements will center on perceptions of school climates by administrators including their successes, weaknesses, goals and engagements.	
16	Stress			
17	School Demographics	School, Student and Community Profiles	Statements will center on school profile (size, diversity geography), student profile (populations, ethnicities, achievement, socioeconomic) and community profile.	
18	School Profile			
19	Student Centered			
20	Student Demographics			
21	Student Image			
22	Society			
23	Socioeconomic Factor	School, Student and Community Socioeconomic Factors and Adjustments	Statements will center on socioeconomic factors including school, staff and student backgrounds and educational adjustments due to poverty or affluence.	
24	Budget	School Revenues, Expenditures, and Stewardship	Statements will center on school revenue sources, expenditures, and budgetary stewardship and philosophy.	The presence and observance of commercial practices by school leadership in the accounting of resource needs.
25	Fees	Rationale and Classification of School Fees	Statements will center on school fees, their rationales, accommodations and philosophy.	
26	Comparison			
27	Financial Management	Operational Financial Management of Budgets by	Statements will center on administrators actions and strategies in managing budgetary revenues	

Conceptualization of Coding Progression				
	Initial Descriptive Codes	Axial Conceptual Codes	Axial Coding – Rules of Inclusion	Emerging Themes
28	Advertising	Administrators	and expenses.	
29	Foundations			
30	Fundraising			
31	Resources			
32	Sponsorship			
33	Supplemental Materials			
34	Opportunities			
35	Partnerships	School Engagements with External Partnerships	Statements will center on external partnership activities, their creations, motivations, successes and effects.	
36	Learning Opportunities			
37	Competition			
38	Professional Development			
39	Private			
40	Procedure	Commercial Procedures for Educational Stakeholders	Statements will center on specific commercial procedural requirements from staffs, administrators, governing boards, school boards, unions and partnerships.	
41	Security			
42	Board	School and Governing Board Involvement	Statements will center on school and governing board involvements with finances, academic achievements, supports and governance.	The ethical educational leader is critically

Conceptualization of Coding Progression				
	Initial Descriptive Codes	Axial Conceptual Codes	Axial Coding – Rules of Inclusion	Emerging Themes
43	Communication	Communication with Educational Stakeholder	Statements will center on communication with various educational stakeholders including students, staff, parents, boards, partners, community members and governments.	important in the management of commercial and financial practices in schools.
44	Effect	The Effects of Commercial Practices	Statements will center on the noted commercial effects, both positive and negative, of their leadership practices from administrators on educational systems.	
45	Governance	Policies, Practices and Applications of School Governance	Statements will center on the governance of school leaderships in correspondence to educational law, policies, and contractual agreements.	
46	School Operation			
47	Policy			
48	Exceptions			
49	Union			
50	Data			
51	Government	Government Involvement and Implications	Statements will center on the governance and implications on schools from municipal, provincial and federal government policies, plans and behaviors.	
52	Cultural Identity			
53	Personal History	Administrator Profiles	Statements will center on the amount of experience, locations, professionalism and engagement of school administrators.	
54	Admin Salary			
55	Personal Relationship			
56	Philosophies	Educational Philosophy	Statements will center on the philosophies of	

<b>Conceptualization of Coding Progression</b>				
	<b>Initial Descriptive Codes</b>	<b>Axial Conceptual Codes</b>	<b>Axial Coding – Rules of Inclusion</b>	<b>Emerging Themes</b>
57	Relationships		administrators towards their roles and responsibilities, their profession, the educational system, educational stakeholders and society.	
58	Personal Values			
59	Politics	Educational Politics	Statements will center on the various motivators from educational stakeholders 0including school staff, school boards and the ministry of education.	
60	Professional Capacity	Professional Capacities of School Administrators	Statements will center on the required skills, knowledge and attributes required to be considered an effective school administrator.	
61	Training	Administrator Development	Statements will center on the development of school administrators including professional and personal competencies.	

Table 4: Provides a conceptualization of coding progression through initial coding, axial coding, and emerging themes.

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