ICHAK ADIZES'S ORGANIZATIONAL THEORY APPLIED TO

THE CLASSICAL CHRISTIAN EDUCATION MOVEMENT:

A MULTIPLE CASE STUDY

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by

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APPROVAL SHEET

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To God alone be the glory in the church, in the home,

in the academy, and in the world (Ps 115:1).

TABLE OF CONTENTS

LIST OF TABLES

LIST OF FIGURES

PREFACE

If you try to direct a dog by pointing in a direction, the dog will look at the pointed finger rather than the direction. Like dogs, humans can easily miss the larger point. While the dog can only see the physical finger, humans are able to interpret transcendent meaning that goes beyond sensory experience. This work would have remained in my mind without those in my life who are able to look beyond the pointed finger to the transcendent direction. I praise God for those in my life who have shown their belief that nothing is impossible with God. God has placed a number of people in my life to make this work possible.

I would like to acknowledge six earthly parties and two heavenly ones: the Trustees of Coram Deo Academy who supported this endeavor, other leaders in the classical Christian movement like David Goodwin and Keith Nix, Dr. R. Albert Mohler of Southern Seminary who called me after my son died, the Association of Classical Christian Schools, my parents and in-laws who helped with kids (and let me use home office), and most importantly, my nurturing wife, Brooke. The first heavenly party I would like to acknowledge is my son, Knox, who passed away right before starting this process; he reminds me that any man who stands with God, even if he stands alone, stands in the majority. I also want to acknowledge the good and gracious King who saved me when I was 20 and put my feet on solid ground. Now to the King eternal, immortal, invisible, the only God, be honor and glory forever and ever in the church, the academy, and the world. I thank you Jesus Christ for keeping me from wasting my life.

David Seibel

Indianapolis, Indiana

December 2022

CHAPTER 1

INTRODUCTION

The two inciting causes of this research were the work of Ichak Adizes on

leadership in organizational lifecycles and the progress of the classical Christian education

movement in America.[1] This research was built upon the idea that the Adizes program

could be the needed therapy for the perennial organizational leadership problems of the

classical Christian schooling movement.[2] The classical Christian schooling movement

has thrived when it comes to curriculum, pedagogy, and student formation, but the overall

organizational stability, administration, and financial sustainability of classical Christian

institutions has yet to be proven for many young schools.[3] Given that the classical Christian

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[1] Gene Edward Veith and Andrew Kern, *Classical Education: The Movement Sweeping America*, 3rd ed. (Washington, DC: Capital Research Center, 2015). Veith and Kern survey the classical schooling movement that defines education as the cultivation of wisdom and virtue by nourishing the soul on truth, goodness, and beauty. They identify three forms of classical education: democratic, moral, and Christian. This thesis focuses on classical Christian education as defined and delivered by the membership of the Association of Classical Christian Schools.

[2] Ichak Adizes, *Managing Corporate Lifecycles* (Santa Barbara, CA: Adizes Institute, 2004). Ichak Adizes integrates certain stages of the organizational lifecycle with particular management styles: producer, administrator, entrepreneur, and integrator and provides a methodology for diagnosing the stage of the lifecycle as well as the needed therapy to reach the next stage of the lifecycle. This research was ignited by observing how many classical Christian schools were not reaching their full potential and only serving grades K-8 instead of K-12. It is also worth noting that this dissertation will use the words *leadership* and *management* interchangeably. Contemporary management thinkers draw fine distinctions between words like administration, management, and executive leadership, because they, in many cases, are in search of the ideal executive who does not exist. Adizes asserts that the answer to perennial organizational problems is not the ideal executive, but a complementary team that covers the major management roles.

[3] Eileen Joy Dietrich, "Leading Classical Christian Schools: Job Satisfaction, Job Efficacy, and Career Aspirations" (EdD diss., Fordham University, 2010). Dietrich's work on headmasters of classical Christian schools demonstrates the need for improved management of these schools and better training for those in management. She showed that the average tenure of ACCS headmasters was less than five years and that most had little to no training or ongoing support to the lead burgeoning classical schooling movement.

movement is in its fourth generation, more than enough quantitative and qualitative data is available to document the growth process of classical Christian institutions.[4] This research inquires into the validity of the Adizes organizational therapy program as an aid in documenting the growth process and providing the leadership of classical Christian institutions with a map to navigate the road ahead. Like a doctor with a patient, the Adizes program may be helpful in diagnosing the organizational problems and then prescribing a management role to lead the organization back to health.[5]

The Association of Classical Christian Schools (ACCS) Accreditation Standards encourage schools to offer grades K-12, yet more than 50 percent of ACCS member schools only serve grades K-8.[6] The first accreditation standard that encourages offering K-12 is that K-12 is the standard ACCS accreditation, whereas a K-8 school is only able to earn a "limited grade level endorsement," which carries less weight and even requires

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[4] Ravi Jain and Kevin Clark, *The Liberal Arts Tradition: A Philosophy of Christian Classical Education*, 3rd ed., ACCS ed. with Practical Application (Camp Hill, PA: Classical Academic, 2021). The ACCS President David Goodwin, in the preface of this book, describes the recovery of classical Christian tradition over the past fifty years as one that is occurring in generations. Later, this research will describe these generations as stages of the lifecycle using the Adizes language.

[5] Ichak Adizes, *Mastering Change: Introduction to Organizational Therapy* (Santa Barbara, CA: Adizes Institute, 2016), 31. The work of Adizes is the backdrop for this dissertation, which shows how the Adizes program can diagnose a school's lifecycle stage into one of four stages (infancy, go-go, adolescence, or prime) and prescribe an infusion of one of four management roles (producer, administrator, entrepreneur, and integrator) to move the school forward to the next stage in the lifecycle. Although the Adizes program does make some *a priori* anthropological assumptions, the disoriented foundational interpretations about the nature of man do not ruin the accurate observations that Adizes makes about how humans behave during organizational change. He makes accurate insights about how humans behave, but his interpretations of why they behave in a certain way is grounded in natural selection and Pavolovian conditioning.

[6] Chase Tolliver Austin, "Wisdom, Eloquence, and Academic Rigor in ACCS Schools: A Mixed Methods Study" (EdD diss., The Southern Baptist Theological Seminary, 2019), 192. Austin notes that 140 of the ACCS's 290 schools offered grades 9-12. As of 2021, the membership of ACCS schools has crossed 400 total schools due to the number of schools just now starting. Therefore, the number of schools that offer K-8 or less instead of K-12 has increased from 2019 to 2021, and there is a greater need to provide those school leaders with a set of milestones to aim for on the path ahead.

additional authorization if the school becomes K-12 in the future.[7] Second, the ACCS handbook highlights that grades 9-12 represent the third stage, the rhetoric stage of a classical Christian education:

> The recovery of classical Christian education is based on the Trivium, the first three of the seven liberal arts. Dorothy Sayers drew important observations from the Trivium as she described medieval education. She also correlates the Trivium to the developmental stages of a child: Poll-parrot (grammar stage), Pert (logic stage), and Poetic (rhetoric stage).[8]

According to the above quote from the ACCS accreditation Standards, a school with only grades K-8 is only 67 percent complete because they are not guiding students through the final third of the academic program, the rhetoric stage. One factor preventing more schools from offering the rhetoric stage is likely correlated with the under-developed capacity of headmasters to add the 9-12 program. A 2011 quantitative study of 213 headmasters in the ACCS revealed that there is a shortage of well-trained and qualified headmasters yet there is not sufficient training and support to develop these leaders.[9] Adizes's organizational expertise could be an important part of the ongoing leadership development and support of the classical Christian schooling movement.

The infant classical Christian movement is not limited to K-12 though, and a number of educational leaders have founded colleges in the last few decades. Colleges like New St. Andrews in Idaho,[10] Bethlehem College and Seminary in Minnesota,[11]

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[7] Association of Classical Christian Schools, *ACCS Accreditation Handbook*, 2nd ed. (Moscow, ID: Association of Classical Christian Schools, 2019), 5. As of 2021, I am the head of school at the only K-8 in the world that is going through the K-8 limited grade-level endorsement with the ACCS.

[8] Association of Classical Christian Schools, *ACCS Accreditation Handbook*, 21.

[9] Ellen J. Council, Bruce S. Cooper, and Kendra Deboer, "Leading Classical Christian Schools: An Exploratory Study of Headmasters," *Journal of Research on Christian Education* 20 (May 2011): 117-37. This work shows that the average tenure for school heads of school is about 3.5 years and headmasters within the ACCS tend to have less than desired educational experience.

[10] New Saint Andrews College, accessed October 1, 2021, https://nsa.edu/.

[11] Bethlehem College and Seminary, accessed October 1, 2021, https://bcsmn.edu/.

Patrick Henry in Virginia,[12] Hillsdale College in Michigan (a +100 years institution),[13] and The Masters University in California[14] all have overlapping educational priorities with ACCS schools. Although this research is focused on the K-12 side of the classical Christian movement, higher education shapes K-12 philosophy and practice and future research could look into the applications of Adizes's thinking for higher education. Further research could support the ACCS strategic initiative to launch colleges at five high schools by 2028.[15]

The Adizes program has been used to diagnose and transform organizations, including churches, governments, performing arts centers, and more than one thousand companies.[16] This research builds on the work of others who have sought to apply the Adizes framework to Christian education. One example of this would be Simon Jeynes, the executive director of Christian School Management. Jeynes has written "The Christian School Lifecycle," in which he presents a taxonomy of levels of school maturity informed

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[12] Patrick Henry College, accessed October 1, 2021, https://www.phc.edu/.

[13] Hillsdale College, accessed October 1, 2021, https://www.hillsdale.edu/.

[14] The Master's University, accessed October 1, 2021, https://www.masters.edu/.

[15] David Goodwin, *The ACCS Strategy (2021-2026)* (Moscow, ID: ACCS, 2021), 22. The ACCS calls this the K-14 and college program accreditation initiative. Because higher education has so much influence on K-12 and the broader culture, ACCS leadership is seeking to build and accredit programs that can provide teachers for this educational movement. Moreover, many juniors in classical Christian high schools could essentially begin the traditional college experience while technically still in high school. This could be a strategic educational disruption that will happen in the 2020s. In some sense, it is similar to students in high school that earn dual-credit or take AP courses that translate to college credit. The difference would be that the credits are not transferring to another institution but that the school is able to also provide grades 13 and 14. This would increase the speed at which kids can earn a degree and begin their working lives or head to graduate school.

[16] Ichak Adizes, "Boards of Directors in the Performing Arts: A Managerial Analysis," *California Management Review* 15, no. 2 (Winter 1972): 109-16. One of the appeals of the Adizes methodology is its uses in the performing arts, government, and education. Adizes is well aware of the differences between the business world and the nuances of the non-profit education world. He is not rooted in empiricism the way other management writers tend to be.

by the Adizes framework.[17] Although Jeynes accurately describes the stages of the school lifecycle, he neglects to make the connection between lifecycle stage and the four management roles, which are the crux of the Adizes program.

Although Jeynes provides a basic introduction to Adizes's lifecycle theory, Adizes's leadership causes of growth throughout the lifecycle are lost in Jeynes's translation and more work is necessary. Jeynes does not mention that the causal chain of the school leadership's impact on the school is linked to the presence, or absence, of the four management vitamins: Producer, Administrator, Entrepreneur, and Integrator. These vitamins, in Adizes terminology, are simply the four management tools needed to reach the ideal stage in the organizational lifecycle. This is a key insight, the link between management function and lifecycle stage, into the Adizes program that other educational researchers have studied.[18] This research focused on the growing stages of the lifecycle and the four leadership causes of growth toward prime, as shown in figure 1.[19]

To understand the heart of this research, it is essential to grasp the connection between the letters PAEI and the lifecycle stage. Three examples demonstrate this connection. First, in the stage of courtship on the bottom left of figure 1, the letters paEi appear. This means that the Entrepreneurial management role is dominant while the producer, administrator, and integrator are merely present. Second, the stage labeled Infancy is the next level up and it correlates with the Paei management code, which means that the Producer role is dominant while the administrator, entrepreneur, and integrator roles are merely present. Third, the stage labeled Go-Go corresponds to the

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[17] Simon Jeynes, "The Christian School Lifecycle," Christian School Management (blog), December 3, 2019, http://www.christianschoolmanagent.org.

[18] Inna Semenets-Orlova et al., "Functional and Role-Playing Positions in Modern Management Teams: An Educational Institution Case Study," *Problems and Perspectives in Management* 18, no. 3 (October 2020): 129-40. This study focused on schools in Ukraine and used Adizes as one of the authoritative sources for studying management styles. However, this study does not look into the relationship between management styles and their impact on movement throughout the lifecycle.

[19] Figure 1 is taken from Adizes Institute Worldwide, "Adizes Organizational Lifecycle," accessed October 21, 2021, https://site.adizes.com/lifecycle/.

PaEi management code, which means that the Producer and Entrepreneur are dominant while the administrator and integrator are merely present. This particular research focuses on the left side of figure 1 by examining schools that are in either Courtship, Infancy, Go-Go, Adolescence, or Prime. Further research could examine schools in the declining stages labeled Aristocracy and Bureaucracy. The stage right before death, Bureaucracy, is
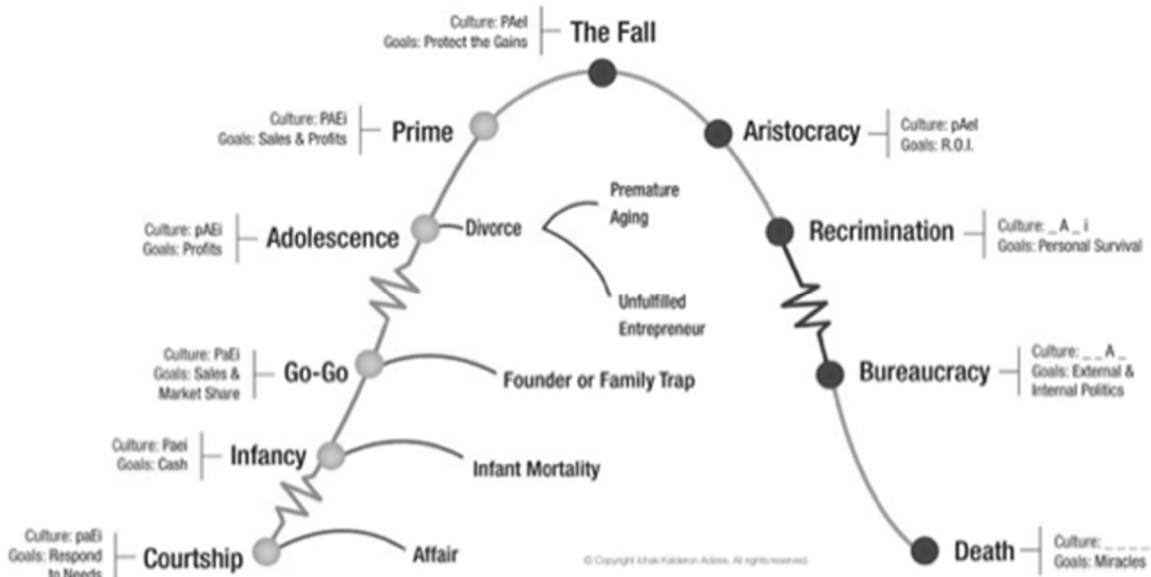
- A- -which means that the Administrator is a dominant yet exclusive management role, which is demonstrated with the symbol of the dash. Whenever there is a dominant yet exclusive management role, Adizes calls this a mismanagement role.[20]

Figure 1. The PAEI management styles throughout the lifecycle

Classical Christian Education in America

In a lecture entitled "30 Years of Renewing Classical Education," ACCS

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[20] Ichak Adizes, "Mismanagement Styles," *California Management Review* 19, no. 2 (Winter 1976): 5-20. The mismanagement styles are whenever one of the management styles, paei, become the dominant and exclusive style of management. While the Arsonist mismanagement style (- - E -) focuses exclusively on effectiveness in the future at expense of efficient and effective production of results in the present, the Lone Ranger mismanagement style (P - - -) focuses exclusively on producing effective results in the present with no regard for efficiency in the present or the future.

President David Goodwin highlights four stages of the classical Christian educational renewal:

> The first generation of classical schools started in the 90s. Dorothy Sayers's 1947 Lost Tools of Learning talk was given. Doug Wilson wrote *Recovering the Lost Tools of Learning*, which then evolved into the ACCS, which launched with 25 schools. Generation two is the interjections of the integration, great books, great ideas, Socratic discussion, and the first three of the liberal arts as things to master (1999-2006 schools). By the third generation we were into the old Augustinian ideas of the cultivation of the affections (sparked by James K.A. Smith). I think there is a fourth generation. I suspect the quadrivium will be part of that. There is a lot more to implement in the quadrivium.[21]

Using the stages of the lifecycle from *Managing Corporate Lifecycles* and the generational description from Goodwin, the following paragraphs describe the lifecycle stages of the classical Christian movement.[22]

Acknowledge that these are the stages of the P (teaching & learning subsystem). The classical Christian schooling movement in America has been a recovery that can be subdivided into four generations: infancy, early go-go, late go-go, and early adolescence.[23] The first generation of the recovery, Infancy, is mostly tied back to two sources and two events. The two sources are the 1991 book by Douglas Wilson, entitled *Recovering the Lost Tools of Learning*,[24] which is based upon the 1947 essay by Dorothy Sayers entitled "The Lost Tools of Learning."[25] Wilson's book was a recovery and recontextualization of Sayers's ideas that was both deconstructive in one sense and reconstructive in another.

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[21] David Goodwin, "Lesson 4: 30 Years of Renewing Classical Education," *ClassicalU* (blog), accessed February 11, 2021, https://www.classicalu.com/lesson/david-goodwin-04-30-years-of-renewing-classical-education/. A similar explanation was also printed in the ACCS edition of the preface to Jain and Clark, *The Liberal Arts Tradition*.

[22] Adizes, *Managing Corporate Lifecycles*, 19. The growing stages of the lifecycle are Infancy, Go-go, Adolescence, and Prime.

[23] Adizes, *Managing Corporate Lifecycles*, 83.

[24] Douglas Wilson, *Recovering the Lost Tools of Learning: An Approach to Distinctively Christian Education* (Wheaton, IL: Crossway, 1991).

[25] Dorothy L. Sayers and E. T. Heron Publisher, "The Lost Tools of Learning," accessed October 21, 2021, https://www.pccs.org/wp-content/uploads/2016/06/LostToolsOfLearning-DorothySayers.pdf.

Wilson's book effectively deconstructs how the governmental educational reforms of the previous age are the problems of the modern age. His work is reconstructive in that he argues for a return to the disciplined classical model of education and introduces a practical and implementable education design used at Logos School. The two events that occurred in the 1990s that represent the first generation of the recovery are the formation of the ACCS in 1994 and the founding of New St. Andrews College NSA in 1994. The ACCS was formed in response to the large number of schools that had formed based upon Wilson's book where he shared the principles and practices that guided Logos School. Visionary parents needed administrative support from the ACCS and ideas for how to market the school and enroll mission-aligned families.

The Infancy of the classical Christian schooling movement is largely tied to Wilson, a Presbyterian pastor in Moscow, Idaho, who in every way meets the Adizes criteria of the Entrepreneurial management style.[26] Wilson and his wife decided to help found a Logos School in 1981, once their children reached school age, and New St. Andrews College in 1994, once their oldest child reached college-age. Over 25 years later, it is quite simple to notice the schools that were formed in the Infancy years of the classical Christian schooling movement. They tend to bear three common marks. First, these schools tend to have been formed between the years 1992 and 2000. Goodwin asserts that there were around 100 schools formed at this time.[27] The second mark is that these schools cite the 1947 essay by Dorothy Sayers as their primary inspiration. It is incredibly common to see the Sayers essay on these schools' websites and Sayers's quotes in their marketing materials. One of the most common quotes from Sayers cited by these schools is, "Is it not the great defect of our education to-day (—a defect traceable through all the

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[26] Ichak Adizes, *The Ideal Executive* (Santa Barbara, CA: Adizes Institute, 2004), 81. The entrepreneur is one who sees opportunities in the future and is willing to be the first one to take a risk. Wilson has been instrumental in starting a school, starting a college, starting the ACCS, and starting a Presbyterian denomination.

[27] Jain and Clark, *The Liberal Arts Tradition*, 6.

disquieting symptoms of trouble that I have mentioned—) that although we often succeed in teaching our pupils 'subjects,' we fail lamentably on the whole in teaching them how to think? They learn everything, except the art of learning."[28] The third mark of these schools is Sayers's stage-based understanding of the language arts of the trivium popularized by Wilson and introduced in these first 100 ACCS schools. In this understanding of the classical trivium, the elementary years are labeled the grammar stage, the middle school years the logic stage, and the high school years the rhetoric stage.[29]

The second stage of the classical Christian recovery, early Go-Go, covers the years from 2000 to 2008 where the classical Christian recovery begins to move beyond its founding stage.[30] During these years, four noteworthy developments took place. First, the ACCS expanded to 200 schools. Second, the increasing popularity of the Society for Classical Learning (SCL) demonstrated that classical Christian schooling was not just a regional phenomenon in the Western United States nor a phenomenon tied exclusively to Sayers and Wilson.[31] The ACCS was formed out of Moscow, Idaho, while the SCL was led by those on the East coast.[32] While the ACCS was focused on a Protestant and Reformed perspective on the classical Christian tradition, the SCL had a more inclusive ecumenical approach grounded in the Nicene Creed and the liberal arts tradition.[33] Third,

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[28] Sayers and Publisher, "The Lost Tools of Learning."

[29] Association of Classical Christian Schools, *ACCS Accreditation Handbook*, 17.

[30] Adizes, *Managing Corporate Lifecycles*, 64.

[31] Society for Classical Learning, accessed October 1, 2021, https://societyforclassicallearning.org/.

[32] Robert Littlejohn and Charles Evans, *Wisdom and Eloquence: A Christian Paradigm for Classical Learning* (Wheaton, IL: Crossway, 2006), 3. Evans and Littlejohn were part of the early days of the Society for Classical Learning which later led to this book.

[33] Douglas Wilson, *The Paideia of God: And Other Essays on Education*, 2nd ed. (Moscow, ID: Canon Press, 2019), 55. In Wilson's essay, "Is Classical Education Reformed?," he demonstrates his protestant approach to classical education that differs from the more ecumenical approaches that can tend to place a bigger priority on philosophy than on theology.

Patrick Henry College was formed in the year 2000, and Larry Arn became the twelfth president of Hillsdale College in the year 2000. While Patrick Henry is a classical Christian college known to educate homeschooled students, Hillsdale College has become a leading classical Christian college under Arn's leadership over the past twenty years. Hillsdale Academy began as a classical Christian K-12 model school on Hillsdale College's campus in 1990 with 45 students. Since then, it has grown in size and influence over the past thirty years.[34] Arn has proved to be a catalyst for classical education in both K-12 and higher education. Fourth is the book *Wisdom and Eloquence: A Christian Paradigm for Classical Learning* written in 2006 by two headmasters, Charles Evans and Robert Littlejohn, the founders of the SCL.[35]

This second stage of the classical Christian recovery should be entitled "early Go-Go" because the movement grew both deeper and wider.[36] Although there has always been some semblance of a classical witness in American schooling, the early 2000s were marked by the emergence of a variety of groups flying the classical Christian banner on both coasts, the north and the south, in K-12 and higher education, and in both charter, homeschooling, and private schools.[37] Go-Go is akin to the toddler stage where the child is "getting into everything."[38] Despite the movement's diversity, the unifying thread in all of this diversity was "integration and great books."[39] The body of knowledge contained in

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[34] This is the K-12 private school that is on Hilldale's campus.

[35] Littlejohn and Evans, *Wisdom and Eloquence*. This study does not include SCL schools for two reasons: they are allowed to receive vouchers, and there is no publicly available data like the ACCS has with the "Find a School" website, https://classicalchristian.org/find-a-school/. Moreover, the ACCS provides a set of accreditation standards and a process for accreditation so their beliefs can be more easily researched, whereas a greater diversity likely exists among SCL schools. Further research could include these schools in a study examining the application of the Adizes program.

[36] Adizes, *Managing Corporate Lifecycles*, 14.

[37] Veith and Kern, *Classical Education*, 76.

[38] Adizes, *Managing Corporate Lifecycles*, 16.

[39] Jain and Clark, *The Liberal Arts Tradition*, 4.

the western tradition known as the great books as well as the integrating nature of the

Christian faith are the ties that bind the many different strands of classical Christian

schooling.

The third stage of the classical Christian recovery, late Go-Go, covers the years

from 2008 to 2018 where the movement continued to grow and expand its influence.[40]

Three noteworthy developments took place in this third generation: the expansion from

200 ACCS schools to 300, the inclusion of the cultivation of virtue, and the emergence of

Barney Charter Schools in 2010.[41] In 2009, James K. A. Smith published *Desiring the*

Kingdom,[42] and in 2016, he expanded those ideas into *You Are What You Love*.[43] Smith

was instrumental in waking up educators to the way routines and habits are like catechisms

that shape what humans love and worship. The seeds of the integration between the

Christian faith and classical learning planted in the first generation were watered in the

second generation and began to bear fruit in the third generation of the recovery. After the

2008 recession, there was a slight lull in the expansion of the movement, but the later Go-

Go stage of rapid growth resumed with the ACCS standing at around 300 schools in

2018.[44]

In 2021, the classical Christian schooling movement reached its fourth stage of

development, early Adolescence. According to Ichak Adizes, adolescence is when "the

(movement) is reborn. This second birth is an emotional time where the (movement) must

find a life apart from that provided by its Founder. This critical transition is much like the

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[40] Adizes, *Managing Corporate Lifecycles*, 76.

[41] David Goodwin, "Lesson 4: 30 Years of Renewing Classical Education," Classical U (blog), December 8, 2020, https://classicalu.com/courses/classical-education-in-america-progress-and-trends/.

[42] James K. A. Smith, *Desiring the Kingdom: Worship, Worldview, and Cultural Formation*, Cultural Liturgies 1 (Grand Rapids: Baker, 2009).

[43] James K. A. Smith, *You Are What You Love: The Spiritual Power of Habit* (Grand Rapids: Brazos Press, 2016).

[44] Jain and Clark, *The Liberal Arts Tradition*, 19.

rebirth a teenager goes through to establish independence from their parents."[45] The classical Christian schooling movement is similar to the excavation process at an ancient archaeological dig. Various educational leaders and institutions have brought forth different treasures at different stages, and the current stage of the movement is establishing its own identity. The movement has several significant voices covering a variety of areas of educational expertise. Classical Academic Press, led by Christopher Perrin, provides Latin, science, and history curricula for schools and also publishes biographies of famous educational philosophers.[46] Circe Institute is headed by Andrew Kern and is directed primarily at composition curriculum and professional development for homeschoolers.[47] The SCL is conferences and cohorts for practitioners,[48] while the ACCS[49] does a school conference as well as school accreditation and a quarterly magazine for parents called the *Classical Difference*.[50] Memoria Press,[51] led by Martin Cothran, produces Western Civilization curriculum and a consortium of Latin schools.[52] In many ways, the sub movements within the larger classical Christian movement have matured and formed their own identities and have moved from under the tutelage of the previous founders.

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[45] Adizes, *Managing Corporate Lifecycles*, 78. In 2021, two strong impulses, secularism and sectarianism, are emerging in evangelicalism that could indicate the movement is in some sort of rebirth. Some leaders in the movement are earnestly seeking to expand the movement's reach into American culture yet are syncretistic and are diluting the quality of the classical Christian vision and mission. The sectarian impulse does just the opposite and seeks to retreat from worldly culture rather than redeem it.

[46] Classical Academic Press, "Our Team," accessed October 1, 2021, https://classicalacademicpress.com/pages/our-team.

[47] Circe Institute, accessed October 1, 2021, https://www.circeinstitute.org/.

[48] Society for Classical Learning, accessed October 1, 2021, https://societyforclassicallearning.org/.

[49] Classical Christian Schools, accessed October 1, 2021, https://classicalchristian.org/.

[50] The Classical Difference, accessed October 1, 2021, https://www.classicaldifference.com/.

[51] Memoria Press, accessed October 1, 2021, https://www.memoriapress.com/.

[52] Classical Latin School Association, accessed October 1, 2021, https://classicallatin.org/.

Although there is far more diversity than unity within the movement than ever before, one common thread is represented by the recovery of the mathematical and scientific arts in the quadrivium as represented by the book initially published in 2013, *The Liberal Arts Tradition*.[53]

In 2021, the ACCS has grown to over 400 schools with an explosion of startup schools being established in 2020 and 2021. The potential impact of improved management practices in school administration is incredibly high as of 2021. The enrollment of classical Christian schools has increased dramatically with COVID-19 restrictions and social issues in public education motivating Christian families to leave public schools in large numbers. In 2022, the President of the Association of Classical Christian Schools authored a book with television host Pete Hegseth, entitled *The Battle for the American Mind: Uprooting a Century of Miseducation in America*.[54] The book gained national attention by becoming a *New York Times* Bestseller.

Understanding the leadership causes of growth and decline within schools throughout the lifecycle will help the movement reach the ideal state that Adizes calls Prime. Is educational leadership any different than industrial leadership or mechanical leadership or corporate leadership?[55]

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[53] Jain and Clark, *The Liberal Arts Tradition*.

[54] David Goodwin and Pete Hegseth, *Battle for the American Mind: Uprooting a Century of Miseducation in America* (New York: Broadside, 2022).

[55] The need for management became incredibly pronounced in the United States after the Industrial Revolution when the factors of production left the home and entered the factory. The centralized inputs of labor needed to be efficiently organized for the most effective economic output. In the twentieth century, the common schools of America were created by Horace Mann and compulsory education became the norm for all of the youth of a community. These centralized government-organized schooling activities required management, just like the manufacturers did after the rise of the Industrial Revolution. In both cases, certain activities were moved out of the home or out of apprenticeship-based relationships and into centralized locations to enjoy greater efficiency and standardization. However, it is essential to note the differences between how industrial leadership is different from educational leadership. Adizes asserts that his methodology works in any industry because it is a neutral process devoid of any of its own socio-political content. Therefore, Adizes maintains that it can be used in profit or nonprofit and in any country. While I appreciate the desire in Adizes to create a universal theory, this is not possible when working with human beings because humans are value-ascribing beings.

Research Purpose

The purpose of this qualitative multiple case study research is to understand leadership throughout the growth process of classical Christian institutions affiliated with the ACCS. Many classical Christian schools are thriving in training students but only surviving when it comes to institutional advancement. One of the classical Christian movement's greatest achievements has been its ability to achieve a sacred synthesis between the truth of God's Word and the truths in God's world through a Christian approach to the liberal arts.[56] The driving concern of this research is that the movement has achieved the sacred synthesis in the classroom but not in the headmaster's office or the boardroom—classical school leaders have neglected the subsystems required for operating a school; classical Christian schools are like an airline that focuses on the pilots and the passengers in the plane yet regularly lose peoples' baggage and make mistakes on scheduling flights and printing tickets. The movement at large has failed to acknowledge that a number of systems need to be in place to ensure that the classroom is well-functioning: admissions, marketing, communications, human resources, accounting and finance, board governance, strategic planning, etc. Unlike classical charter schools, the classical Christian schooling movement is a bottom-up organic phenomenon driven primarily by dedicated parents who want something different for the next generation. This means that there is a lot of entrepreneurial vision but typically little administrative acumen or ability to integrate the diverse functions of the school well.

The classical charter movement schools, like Great Hearts academies[57] and the Barney Charter School Initiative,[58] essentially use a franchise model where they identify

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[56] The Society for Classical Learning, "The Sacred Synthesis: How the Church Transformed the Inherited Thought of Greece and Rome to Create Classical Christian Education," October 23, 2020, https://societyforclassicallearning.org/the-sacred-synthesis-how-the-church-transformed-the-inherited-thought-of-greece-and-rome-to-create-classical-christian-education-2/.

[57] Great Hearts, accessed October 1, 2021, https://www.greatheartsamerica.org/.

[58] Hillsdale College, "Barney Charter Schools Initiative," accessed October 1, 2021, https://k12.hillsdale.edu/Schools/BCSI/.

appropriate markets for their schools, identify a local leadership team, provide the pre-launch standards, and within a couple years, a school can be planted that serves hundreds of students free-of-charge.[59] When these schools are born, they are well-along the optimal path to Prime from an organizational perspective.[60] However, this research agrees with ACCS president David Goodwin's belief that classical charter schools lack one essential thing, Christ. "All forms of Classical education depend on a truth center—'The Logos.' The DNA of classical education— what makes it tick—what makes it work—is the cultivation of a *paideia* that is in pursuit of the Logos."[61] Charter schools are a moral and democratic version of classical as opposed to a Christ-centered version of classical.[62]

Classical Christian schools, in most cases, do not grow along the optimal organizational path like charter schools but mature along the typical path which is much more treacherous.[63] Many classical Christian schools began without any sort of demographic analysis, long-term planning, financial modeling, or curriculum design. Classical Christian schools typically begin with a rejection of the status quo in education and a deep conviction for something better for the next generation. While a classical charter school might begin its first year with an admissions department and their own facilities, it might take a classical Christian school 25 years before they have both an admissions department and their own facilities.

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[59] Hillsdale College, "Barney Charter Schools Initiative."

[60] The majority of Adizes's research is on the typical path that an organization takes from Courtship to Prime. The typical path is his basic lifecyle theory where the PAEI functions and subsystems emerge sequentially one-at-a-time; as these PAEI subsystems emerge over the course of the school's lifecycle, certain predictable tensions occur (e.g., the Founder's Trap, the Unfulfilled Entrepreneur, etc.). However, the optimal path is the one where the school begins with all the PAEI subsystems intact. Adizes asserts that a school can be born in Prime. Franchise operations are often born in Prime because of the administrative support that they have from the parent company.

[61] David Goodwin, "Charter Schools," ACCS Member Resource Center (blog), November 8, 2019, https://mrc.classicalchristian.org/wp-content/uploads/2017/02/classical-charter-schools-1.pdf.

[62] Veith and Kern, *Classical Education*, 72.

[63] Adizes, *Managing Corporate Lifecycles*, 246.

A report conducted in 2018 by Notre Dame, also known as the Good Soils report, has confirmed the effectiveness of what happens in the classroom of classical Christian schools.[64] Controlling for the effect of the school and isolating the effect of the family, the 2018-2019 comparative study surveyed 24-42 year old alumni from public, secular private, Catholic, evangelical Christian, religious homeschool, and ACCS (classical Christian) schools on topics of life-choices, preparation, attitudes, values, opinions, and practices. At least three notable results came from the Good Soils report. First, ACCS alumni are more than twice as likely than any peer group to engage in the Christian practices of regular church attendance, small group Bible study, personal spiritual disciplines, and serve as a volunteer. Second, ACCS alumni are twice as prepared as any group for college and career based upon degree earned, college GPA, and job preparedness. This result confirms that ACCS schools prepare students for college better than private college prep schools. Third, ACCS alumni are the most likely to think independently, accept differences yet are willing to challenge prevailing views.[65] Although SAT/ACT scores had long proven the effectiveness of classical Christian academics, the Good Soils report demonstrated that the benefits of classical Christian schooling are more than academic.

Although the academic and spiritual results of classical Christian schooling have been externally validated, the leadership and institutional health of the movement is yet to be formally proven. In fact, another dissertation on classical Christian written in the early 2010s reveals the need for improved training and support of the leadership of the movement.[66] Another Christian schooling movement, the Association of Christian Schools

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[64] The Classical Difference, "Good Soil-The Classical Difference," accessed October 20, 2021, https://www.classicaldifference.com/good-soil/.

[65] David Goodwin, ed., "Good Soils: A Comparative Study of ACCS Alumni Life Outcomes," January 27, 2020, https://www.classicaldifference.com/wp-content/uploads/2020/06/The-Classical-Difference-Good-Soil-7-outcomes-full-research-report-Draft-3-28-2020.pdf.

[66] Dietrich, "Leading Classical Christian Schools."

International (ACSI), published a report entitled "Leadership for Flourishing Schools" that demonstrated the observable practices of the leadership in flourishing schools in their association.[67]

Lynn Swayner, Cindy Dodds, and Matthew Lee present their findings from the leadership of ACSI schools in table 1. Interestingly, the leader-specific constructs in table 1 bear similarities to the PAEI code from Adizes. Purpose points to the Entrepreneur, Teaching & Learning to the Producer, Relationships to the Integrator, Expertise & Resources to the Administrator. However, the ACSI leadership report is not sensitive to the stage-specific problems that must be navigated throughout the lifecycle. It lacks the situational nuance needed to be actionable for school leaders.

Table 1. Leader-specific constructs from ACSI School Leadership Report

Domain	Construct	Definition
Purpose	Integrated Worldview	Christian worldview changes how we educate; there is no such thing as a secular sphere.
	Responsibility (Leaders)	Leaders feel a sense of shared ownership for school mission, success, and improvement.
Well-Being	Stress (Leaders)	Constant feelings of stress and being overwhelmed accompany a lack of time to focus on physical health for leaders.
Relationships	Leadership Interdependence	Leaders, including board members, have diverse backgrounds and are transparent about and rely on others to offset their weaknesses.
	Community Engagement	The school engages with the surrounding community and local churches, and regularly taps into community resources, including networking and resource-sharing with other schools.
Teaching & Learning	Systems Thinking	When planning for change, the potential impact on the school, the classroom, students, and the overall system are considered.
	Data-Driven Improvement	Data is used to gauge school results and effectiveness, determine goal attainment, and address problems the school faces.
	Outcomes Focus	Process does not matter if it isn't producing results, and change is distracting if it doesn't lead to increases in student achievement.
Expertise & Resources	Resource Planning	A strategic financial plan and master facilities plan is in place, and financial planning is a strength of the board.
	Resource Constraints	The school has financial resources to operate effectively; or, a belief prevails that the school could be more effective if not for fiscal constraints, and it lacks the resources needed to make changes.

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[67] Lynn E. Swaner, Cindy Dodds, and Matthew H. Lee, "Leadership for Flourishing Schools," 2021, https://www.acsi.org/docs/default-source/website-publishing/research/fsci-leadership-report-2021.pdf.

The next stage of the classical Christian movement could be focused on improving institutional leadership by providing a leadership framework for growth throughout the school lifecycle. The rationale for doing research on leadership throughout the lifecycle as opposed to only research on leadership, like ACSI did in their "Leadership for Flourishing Schools," is due to the vast differences between leadership in Infancy schools compared to schools in Adolescence or Prime. What might be a helpful leadership behavior at one stage may be detrimental at another stage. For example, the need for administrative leadership that provides policy and procedures is not high in the Infancy years of the school. The need during Infancy is producing results in the classroom and in getting repeat admissions to meet payroll. However, a school without systems and structures in Adolescence needs a much greater focus on efficient administration and less of an emphasis on effective results.[68]

Research Population

The research population of this study is classical Christian schools that meet two criteria. The first of the criteria is the four aspects of Andrew Kern's definition of classical Christian education. According to author and educational consultant Andrew Kern at the Circe Institute, classical education possess four characteristics: (1) a high view of humanity; (2) logocentrism: that all the diverse areas of truth are united similar to pearls on a string and find their unity in Christ; (3) preserving and refining the western tradition; and (4) the language arts of the trivium and mathematical arts of the quadrivium.[69] Second, this research is limited to schools who are classical and Christian, not just classical. Gene Edward Veith and Andrew Kern, in *Classical Education: The Movement Sweeping America*, distinguish between three forms of classical: Christian as portrayed by Wilson and the ACCS, moral as illustrated by David Hicks' work in *Norms*

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[68] Adizes, *The Ideal Executive*, 34.

[69] Veith and Kern, *Classical Education*, 16.

18

and Nobility, and democratic as characterized by the Barney Charter Schools Initiative and Great Hearts Academies.[70] The focus of this research is on those schools aligned with Classical Christian schools from the ACCS, rather than moral or democratic, expression of classical education.[71] The K-12 schools in this multiple case study are all ACCS schools since the ACCS is the only association that collects data on its member and accredited schools. Similar organizations, like the Society for Classical Learning, were excluded because there is no formal database to analyze. Of the six schools within this multiple case study, three are also affiliated with the Society for Classical Learning. Based upon this my experience, it is not uncommon to see schools affiliated with both the Association of Classical and Christian Schools as well as the Society for Classical Learning.

The purpose of this qualitative multiple case study research is to understand leadership throughout the growth process of classical Christian institutions affiliated with the ACCS. The growth process, or lifecycle, will be generally defined as the sequence of stages that a school passes through in its institutional development. The central pursuit controlling this study is the pursuit of making sense of classical Christian school growth and leadership over the lifecycle. Success in this research would look like a clear taxonomy of the stages of school development and corresponding leadership that apply to the participants of this specific research. The strategy for this research aimed at discovering the meaning behind the disparate outcomes of the chosen participant schools affiliated with ACCS. One of the major benefits of a qualitative multiple case study methodology is that the research design thoroughly appreciates the variety of nuanced contextual factors that impact school outcomes.[72]

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[70] Veith and Kern, *Classical Education*, 18.

[71] Veith and Kern, *Classical Education*, 18.

[72] Pamela Baxter and Susan Jack, "Qualitative Case Study Methodology: Study Design and Implementation for Novice Researchers," *The Qualitative Report* 13, no. 4 (2008): 18.

Similar work to this research has been done with Catholic schools by Susan

Diverio in 2020 on "Stability vs Change in Catholic Schools,"[73] and by Denise Donohue

in 2014 on "Private Independent Catholic Schools: Components of Successful Start-Up

Schools."[74] Catholic schools, due to parish support, have sufficient idiosyncrasies

compared to ACCS schools to necessitate an entire study exclusively to studying ACCS

leadership and growth throughout the school lifecycle.

Research Questions

To understand the process of growth and leadership throughout the lifecycle in

classical Christian schools, the following three research questions provide the organization

of both the literature review as well as the multiple case study research methodology.

1. *Defining Prime*: How does one know when a classical Christian institution is performing at its Prime, and does Prime fit with the philosophy and theology of the classical Christian educational mission?

2. *Early Leadership Causes of School Growth and Aging*: What are the characteristics of schools in Courtship, Infancy, and Go-Go, and what leadership behaviors contribute to growth and aging in these early stages?

3. *Later Leadership Causes of School Growth and Aging*: What are the characteristics of schools in Adolescence and Prime, and what leadership behaviors contribute to growth and aging in these early stages?

The driving belief behind this research is that a robust taxonomy of school

growth and leadership can tie together the many different stages of school maturity to

explain how school growth flowers from one stem—complementary leadership throughout

the lifecycle.[75] Each and every head of school and board member need not figure it out

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[73] Susan T. Diverio, "Stability vs. Change in Catholic Schools" (PsyD diss., Walden University, 2020).

[74] Denise L. Donohue, "Private Independent Catholic Schools: Components of Successful Start-Up Schools" (EdD diss., Nova Southeastern University, 2014).

[75] Adizes, *The Ideal Executive*, 211. In Adizes's dissertation, he observed that the socialist system of industrial democracy promoted shared ownership (I) but discouraged entrepreneurialism (E). Adizes postulates that an organization reaches prime, the ideal state of the organizational lifecycle, when four management functions are present, the producer (P), the Administrator (A), the Entrepreneur (E), and the Integrator (I). This research examines the presence or absence of these management functions in different schools along the stages of the school lifecycle using a multiple case study methodology.

for themselves but rather should travel along the paths of those who have gone before them. Classical Christian educators have chosen to do this in the classroom and they now must do it in the boardroom. It is clear that the stage of the lifecycle has an impact on the style of management, so research questions 2 and 3 should reveal different answers.

Terminology

ACCS. The Association of Classical Christian Schools is an evangelical Christian organization without denominational affiliation. ACCS is the largest and most recognized support and advocacy organization for classical Christian education, boasting more than 400 member schools.[76] All ACCS member schools are strongly committed to evangelical Christianity.

Abnormal problems. There are three types of problems in the Adizes program: abnormal, normal, and pathological. *Abnormal problems* are issues never solved in previous stages of the lifecycle that are manifesting themselves in new versions. These issues cause unnecessary pain and entrap the organization in a particular phase of the lifecycle. Previous interventions from leadership did not adequately solve the problem and now the organization must deal with undesirable side effects. The organization with abnormal problems, like a middle-aged person with unresolved problems of adolescence, is "stuck." Organizations with abnormal problems need interventions from external sources because the organization has not been able to solve the issues with its own internal energy and processes.[77]

Adizes Program: At the principle level, the successful diagnosis of every problem is the correct identification of what is falling apart, and a successful treatment or therapy is the integration of those parts into a new whole. At the practical level, the methodology provides eleven steps that certified Adizes therapists take companies through

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[76] Association of Classical Christian Schools, "The Mission of the ACCS," accessed February 28, 2021, https://classicalchristian.org/the-mission-of-the-accs/.

[77] Adizes, *Managing Corporate Lifecycles*, 37.

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to reach prime. The process begins with the Adizes teaching on problems and change and diagnosing the organization's lifecycle stage. Then change teams are established and structures are synchronized, and each month of the year focuses on one of the eleven steps with the exception of December.[78]

Administrator. *Administrator* is one of the four management types needed to reach Prime, the peak stage of the lifecycle. While the Producing role focuses on what to do, the Administering role focuses on how to do things. The Administering role is developed by activities and functions directed at getting things organized, planned, scheduled, systematized, and generally under control by capturing the learning curve about how to do things right in processes, procedures, and systems.[79]

Adolescence. *Adolescence* is the stage in the lifecycle right before Prime where the company is reborn. This second birth is an emotional time where the company must find a life apart from that provided by its Founder. This critical transition is much like the rebirth a teenager goes through to establish independence from their parents.[80]

Classical Christian school. A *classical Christian school* is a Christian school which holds to evangelical Christian orthodoxy and the Apostles' Creed, as well as incorporates the following aspects of schooling throughout: the unification of truth in Jesus Christ, the integration of faith and learning, and a blending of all contents with the trivium and the quadrivium.[81] A *classical Christian institution* is a social structure, a school in this case, that leverages wisdom throughout the ages, talented educators and administrators, and a variety of resources toward the common purpose of glorifying God in the next

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[78] Adizes, *Mastering Change*. This was significant in the sense that it helped me realize how long meaningful transformation can take.

[79] Adizes Institute Worldwide, "Adizes Management Style," accessed September 27, 2021, https://adizes.com/management_styles/.

[80] Adizes Institute Worldwide, "Lifecycle Page," accessed September 27, 2021, https://adizes.com/lifecycle/.

[81] Austin, "Wisdom, Eloquence, and Academic Rigor," 44.

generation. Just like a soul cannot exist except within a body, neither can the classical Christian vision, mission, and virtues exist apart from its institutions.[82] In this study, the classical Christian schools included do not receive federal funding.

Courtship. Courtship is the first stage of an organization's development. At this stage, the company is not yet born. It exists as a gleam in the Founder's eye. The focus of Courtship is necessarily on dreams and possibilities.[83]

Effectiveness. Effectiveness is the degree to which management is fruitful in results in the short-term through satisfying the customer needs and the organization's purpose. To be effective also entails fruitfulness in the long-term through entrepreneurial foresight and a willingness to take risks.

Efficiency. Efficiency is the degree to which management is fruitful in processes in the short-term through administering procedures and through integrating the people with those processes in the long-term to create a culture of mutual trust and respect.[84]

Entrepreneur. Entrepreneur is one of the four management roles needed to reach Prime. To manage as an Entrepreneur is the third role of any organization, which drives the organization to successfully adapt to change. It is developed in a company through all activities that focus on creating new opportunities or responding to threats. To Entrepreneur requires that organizations have "sight" and the ability to see things that others cannot see, plus the willingness to believe in those visions and undertake significant risks.[85]

Go-Go. Go-Go is the stage in the lifecycle after infancy and before adolescence where the organization has a successful product or service, rapidly growing sales, and

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[82] Gordon Smith, *Institutional Intelligence: How to Build an Effective Organization* (Downers Grove, IL: InterVarsity, 2017), 4.

[83] Adizes Institute Worldwide, "Lifecycle Page."

[84] Adizes, *Mastering Change*, 18.

[85] Adizes Institute Worldwide, "Adizes Management Style."

strong cash flow. The company is not only surviving, but also flourishing. Key customers rave about the products and order more. Even investors are starting to get excited. With this success, everyone quickly forgets about the trials and tribulations of Infancy.[86]

Infancy. Infancy is the stage after courtship where the organization is born. This is the moment financial risk has been undertaken and the Founder quits her paying job, signs loan documents, or promises 40 percent of the company to outside investors.[87]

Integrator. Integrator is one of the four management roles needed to reach Prime. To succeed over a long period of time, organizations need to establish a "life" independent of the life provided by its founder(s). The Integrating role focuses on the development of a cohesive team that makes the organization efficient over the long term. Organizations that are well integrated have a pervasive and persistent culture of mutual trust and mutual respect.[88]

Lifecycle. Lifecycle is the process that describes how all living organisms are born, grow, age, and die. Organizations and their subsystems follow a predictable pattern so leaders can know what to expect, which problems are normal, which problems are abnormal or pathological, what causes those problems, what to do about them, and when to do nothing about them.[89]

Management. According to Adizes in *The Ideal Manager*, *management* "is a process, by which organizational goals are identified and continuously re-identified and eventually achieved."[90] In contemporary theory, *management* is not a group of people nor is unidirectional and purely hierarchical. Workers must be part of the management process in which decisions are made and then implemented or else the organization can never reach

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[86] Adizes Institute Worldwide, "Lifecycle Page."

[87] Ichak Adizes, "Corporate Lifecycles," *Executive Excellence* 15, no. 2 (February 1998): 6.

[88] Adizes, "Mismanagement Styles," 14.

[89] Adizes, "Corporate Lifecycles," 10.

[90] Adizes, *The Ideal Executive*, 82.

prime by becoming effective and efficient in the short-term and long-term. People must be developed and trained whereas processes and plans must be managed. *Management* involves interdependence, which implies that the process of *management* refers to the decisions and implementation done to accomplish tasks that could not be accomplished by one individual. The four tasks of management are Producing, Administering, Entrepreneuring, and Integrating.

Normal problems. There are three types of problems: normal, abnormal, and pathological or chronic. *Normal problems* are transitional issues that an organization can discuss, decide, and solve using its own internal energy with its own particular processes. These unavoidable problems are germane to the stage of development. Like a baby, it must fall to learn to walk.[91] These problems need to be experienced to grow.

Optimal path. The *optimal path* is the shorter route to prime where the organization develops the needed capabilities simultaneously rather than sequentially.[92]

Pathological problems. There are three types of problems: normal, abnormal, and pathological or chronic. *Pathological problems* are distinguishable from abnormal problems by their gravity and chronic nature. These issues endanger the entire organization's ability to survive. These issues require surgical intervention from a turnaround specialist.[93]

Pragmatism. *Pragmatism* is a philosophy that judges the truth of an idea based upon its consequences. Pragmatists are concerned with the process of knowledge as opposed to the content of knowledge. Historically, this has been evident in the emphasis on critical thinking with little concern for the content of critical thought or the ends of critical thought. Moreover, the philosophy is concerned with the relationship of an idea to its implied actions and results, especially in the short-term. In this system, truth is defined

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[91] Adizes, "Corporate Lifecycles," 11.

[92] Adizes, "Corporate Lifecycles," 221.

[93] Adizes, "Corporate Lifecycles," 13.

as "what works" rather than what has been received from sacred revelation in divine texts or the passing down of traditions. Thus, truth is always in flux because it has been democratized and contextualized to a time-space bound experience. With reference to the Wesleyan quadrilateral, pragmatists place emphasis primarily on experience and secondarily on reason with little or no reference to tradition and divine revelation.[94]

Progressivism. Progressivism is a philosophy of education which arose as a reaction against traditional, formal methods of instruction. Knight lists six principles of progressivism: education is child-centered, students are active not passive in learning, the teacher is a facilitator and guide, the school is a microcosm of society, a preference for problem-solving as a method, a cooperative and democratic social atmosphere.[95]

Prime. Prime is the optimal position on the lifecycle, where the organization finally achieves a balance between control and flexibility. Prime is actually not a single point on the lifecycle curve. Instead, it is best represented by a segment of the curve that includes both growing and aging conditions.[96]

Producer. Producer is one of the four management roles needed to reach prime. The first and foremost role of an organization is to produce results. The result to be produced—the basic reason for the existence of the organization—is to satisfy customer needs. This role is developed in an organization through all those activities that focus on producing the product or service being offered to the marketplace.[97]

[94] Michael J. Anthony et al., *Evangelical Dictionary of Christian Education* (Ada, MI: Baker, 2001), 278.

[95] George Knight, *Philosophy and Education*, 4th ed. (Berrien Springs, MI: Andrews University Press, 2006), 108-19.

[96] Adizes, "Corporate Lifecycles," 12.

[97] Adizes, *The Ideal Executive*, 92.

Sacred synthesis. Sacred synthesis is the way in which great ancient and medieval Christians transformed pre-Christian thought by sifting, synthesizing, and transforming it in light of the lordship of Christ the Logos and his gospel of redemption.[98]

Typical path. Typical path is the most common series of steps that leaders take their organizations through on the journey from courtship to prime. Following this sequence, they encounter problems that exist because the organization has yet to develop certain capabilities. By solving those problems, they develop the capabilities they need to advance along the lifecycle. Organizations on the typical path develop capabilities one at a time.

Research Design

The intentional measurement boundaries of this multiple case study logically limit the overall generalizability of the overall research findings. The boundaries in this research were intended to focus on the central phenomenon of the growth process in the chosen ACCS schools participating in the multiple case study research.[99] The schools selected in this research serve as examples of the stages in the sequence of organizational development from Infancy to Prime. Since the particular focus of this research is to qualitatively understand the sequence of stages classical Christian schools pass through over time and the corresponding management, purposeful sampling has been used. The goal of this sampling methodology is to choose participants who will saturate the thesis with data aligned to the overall research purpose, which is to understand leadership throughout the growth process of classical Christian institutions affiliated with the ACCS. This study chose schools that range along the stages of the school lifecycle to maximize the opportunity to learn about the growth process when comparing across the multiple

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[98] The Society for Classical Learning, "The Sacred Synthesis."

[99] John W. Creswell and Cheryl N. Poth, *Qualitative Inquiry and Research Design: Choosing among Five Approaches*, 4th ed. (Thousand Oaks, CA: Sage, 2016), 19.

cases. Moreover, within-case research was done within each of the cases to demonstrate the school's movement from one stage to another over time.[100] To choose schools at various stages of maturity, the researcher considered age of school, total enrollment, leased or permanent facilities, board structure, number of administrators, and tenure of head of school. The qualitative case study methodology has been used to study the leadership causes of the growth phenomenon.

This study is limited in seven areas that other researchers could take up in the future. First, it is not a mixed methods or quantitative study. Second, this research does not include classical charter schools or classical Christian schools (k-12) outside of the ACCS. Third, the multiple case study methodology only samples a small number of schools. A different methodology could study this phenomenon at a larger scale, which could increase the generalizability of these findings. Fourth, a large number of private schooling movements, Christian and secular, are excluded from this research, yet the Adizes program likely has lifecycle and leadership applications to those movements as well. Further research could seek to apply the Adizes lifecycle research to those schooling movements. Fifth, this research seeks to apply the lifecycle research of Ichak Adizes, but excludes the lifecycle theories of others who could make valid contributions to the conversation about how classical Christian organizations grow over time. Others could use different lifecycle frameworks to do the same sort of research. Sixth, this research does not study organizations in the aging stages of the lifecycle. Seventh, the Adizes Program has eleven steps yet this study, due to the duration of the study, only sought to understand the first step, organizational diagnosis.[101]

The decision to exclusively use the work of Adizes was made based upon the

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[100] Creswell and Poth, *Qualitative Inquiry and Research Design*, 82.

[101] Adizes, *Mastering Change*. The initial steps focus primarily, albeit not exclusively, on diagnosing the organization. However, the unique aspect of the Adizes methodology is that the instrumentation used to assess the organization does initiate the process of organizational therapy in its use of the focus group assessment which will be discussed in chap. 3.

wide-reaching scope of his work, the simplicity of his growth stages (Courtship, Infancy, Go-Go, Adolescence, and Prime), and the clarity of his management styles (Producer, Administrator, Entrepreneur, and Integrator). The internal consistency and comprehensive clarity of his works make his framework manageable to apply in a case study methodology. The case study methodology is utilized to describe a phenomenon and Adizes provides a terminology that is useful in two primary ways. First, his descriptions of Courtship, Infancy, Go-Go, Adolescence, and Prime enable the researcher to match an entire school to a stage based upon the problems the school is experiencing. The diagnostic language proved invaluable for this case study research. Second, Adizes's unique insight is that four management roles must be present for an organization to reach Prime and that each management type (Producer, Administrator, Entrepreneur, and Integrator) has a time in the lifecycle where it is dominant.[102] Searching for the dominant management roles was instrumental in diagnosing a school's position in the lifecycle and prescribing next steps.

This researcher initially considered doing a deep archival dive into one single mature school's institutional history, but that methodology fell short for three reasons. First, by only studying one thriving school, there would be a great risk of choosing a school that is benefiting merely from external factors like geography, market competition, or a single generous donor, which would have limited the generalizability of the research. Thus, this research used a multiple case study methodology to appreciate the contextual qualitative factors that impact school growth. Second, the majority of classical Christian schools are still less than thirty years old, which means that most have not developed organized protocols for data management and a multiple case study methodology would better examine the phenomenon under investigation, especially if archival data was not readily available. Third, only studying one school would not necessarily cover the whole range of the lifecycle from Courtship to Prime and would not highlight each PAEI management style. Although the multiple case methodology does not

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[102] Adizes, *The Ideal Executive*, 36.

allow the researcher to inquire as deeply into each case, the ability to do cross-case analysis was essential for understanding the overall growth process throughout the lifecycle. Additionally, the multiple case study methodology was best suited to the particular research questions of this thesis.

This study explored the phenomenon of institutional growth in classical Christian institutions by employing a qualitative multiple case study methodology. The rationale for choosing the multiple case study is fourfold. First, the qualitative nature of this methodology asks open-ended questions that begin with the words "how" and "why."[103] To study a complex phenomenon like institutional growth requires a flexible methodology to account for all of the many causes that lead to the effect of school growth throughout the lifecycle. Second, the case study methodology collects data from a variety of internal sources like financial statements, meeting agendas, and strategic planning documents while simultaneously accounting for relevant contextual factors like location, size of market, and competition.[104] By analyzing archival documents like historic enrollment records and past financial statements, the present state of the school can be analyzed based upon its own internal history as well. Each data source is an individual piece of the larger puzzle. The case study is ideal for this particular study because the boundaries are not clear as to whether the causes for growth are internal decisions of the institution's leadership or external factors in the educational marketplace. Third, the multiple case study methodology analyzes all the collected data in holistic and iterative fashion. With regard to holistic analysis, this researcher seeks to identify patterns, link data to hypotheses, and synthesize data into generalizable theory in chapter 4. As it pertains to iterative analysis, the research findings and conclusions come in waves rather than a singular avalanche. The sequence from collecting data to analyzing to drawing conclusions is far from linear. Fourth, the results of individual case studies can be put

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[103] Baxter and Jack, "Qualitative Case Study Methodology," 18.

[104] Creswell and Poth, *Qualitative Inquiry and Research Design*, 100.

into conversation with one another to propose a taxonomy of school growth that could potentially have wider application.

To enhance understanding of the entire school growth process and corresponding leadership, a three-phase qualitative descriptive case study methodology was employed. Figure 2 is applying the same methodological design used by McGaughey in "Change Management for Christian Leaders: A Multiple Case Study."[105] The same design was also used by McCready in his multiple case study on relay succession in Assemblies of God churches.[106]

Figure 2. Three phases of case study methodology

Phase 1 was all the preliminary work before the cases were selected and studied. This involved getting appropriate approvals and human participant permissions from the leadership teams at the schools as well as scheduling the visits. Moreover, it was important that that all the participant selection criteria are met by the overall sampling of schools. To fail to select schools that cover the range of the lifecycle would further limit

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[105] Kevin Byron McGaughey, "Change Management for Christian Leaders in the Marketplace: A Multiple Case Study" (PhD diss., The Southern Baptist Theological Seminary, 2016), 186.

[106] Robert Collison McCready, "Relay Succession in the Senior Pastorate: A Multiple Case Study Method" (PhD diss., The Southern Baptist Theological Seminary, 2011), 167.

the generalizability of the study.[107] Moreover, poor case selection would not provide adequate data to meaningfully answer the research questions pertaining to the leadership causes of school growth.

Phase 2 involved an onsite focus group with active leaders of the participant schools that represent a cross-section of multiple levels of the organization. According to Creswell, the focus group data qualitative data collection instrument is useful in cases where the participants cannot be directly observed, the participants can provide historical information on the school, and focus groups allow the researcher control over the line of questioning to concentrate on the research questions. This researcher acknowledges the potential limitations inherent to focus groups: participants filtering information, bias due the presence of a researcher acting as facilitator, and not all people are equally articulate and perceptive.[108] The school visit focus group concentrated on discovering in a participative fashion all of the major and minor problems of the entire school, since the Adizes methodology determines lifecycle stage via the problems of that particular stage. The perceived problems from the participants were articulated by teachers, administrators, board members, and support staff during the focus group. The group then diagnosed their stage.

Phase 3 revealed if the participant schools selected were actually in the stages that they seemed to inhabit. The selection criteria categorized a school's maturity based upon the external factors of enrollment, facilities, board governance, and administrative structure. Adizes, on the other hand, categorizes a school's stage in the lifecycle based upon the presence of PAEI and the nature of the problems the school is experiencing. Phase 3 summarizes the school visit and performs within-case and cross-case analysis to see if the participant schools behaved according to the Adizes methodology. Going

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[107] McGaughey, "Change Management for Christian Leaders," 186; Baxter and Jack, "Qualitative Case Study Methodology," 18.

[108] John W. Creswell and J. David Creswell, *Research Design: Qualitative, Quantitative, and Mixed Methods Approaches*, 5th ed. (Los Angeles: Sage, 2018), 188.

through these three phases generated a descriptive growth taxonomy based upon the analysis of findings from the school visits.

CHAPTER 2

PRECEDENT LITERATURE

The purpose of this qualitative multiple case study research is to understand leadership throughout the growth process of classical Christian institutions affiliated with the ACCS.[1] To understand the anatomy of growth and leadership throughout the lifecycle, this research selects case study schools throughout the stages in the school lifecycle. Because leadership is an essential ingredient in the growth process, this research also searches for the presence of four complementary management roles in the leadership teams of the case study schools: Producer (P), Administrator (A), Entrepreneur (E), and Integrator (I). Ichak Adizes writes, "Like a missing vitamin will cause disease, a missing role will produce a pattern of corresponding mismanagement."[2] The four lifecycle stages and the four management roles, or styles, come from more than fifty years of Adizes's research. This chapter show the foundations from theology, philosophy, and the relevant Adizes lifecyle and leadership literature that undergird this entire project on the growth and leadership of classical Christian schools.

Based upon the research questions, the literature review is organized under four headings. First, "Background of This Study" provides context on Adizes and the other

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[1] Ichak Adizes, *The Ideal Executive* (Santa Barbara, CA: Adizes Institute, 2004). In the Adizes lifecycle model, the different stages of growth are correlated with four management functions (PAEI): Producer, Administrator, Entrepreneur, and Integrator.

[2] Ichak Adizes, *Mastering Change: Introduction to Organizational Therapy* (Santa Barbara, CA: Adizes Institute, 2016), 31. Adizes believes that one can look at managerial problems the way a doctor would look at medical diseases, and identify the missing management role causing the organizational problems. That previous sentence is the core of the Adizes program: organizational problems can be tied back to management deficiencies. In the same that a doctor would treat a certain bodily deficiency with a certain vitamin, an organizational deficiency can be corrected by injecting the missing management role into the system to nurse the organization back to health.

voices connected to this dissertation. Second, "Theological and Philosophical Foundations of Prime" defines what fruitfulness, as opposed to mere success or faithfulness, looks like in classical Christian institutions and their leadership from a theological perspective. Third, "Beginning the Journey: Courtship, Infancy, and Go-Go" is focused on uncovering the anatomy of leadership and growth in the initial stages of the school lifecycle.[3] Fourth, "Continuing the Journey: Adolescence and Prime" shows how the principles of growth in the earlier stages are developed in the later stages of the school lifecycle.

Background of This Study

The value of this entire study hinges upon the Adizes methodology being worthy of consideration for classical Christian schools. According to Creswell, one of the purposes of case study research is to challenge whether a theory from the literature actually holds true in practice.[4] Adizes asserts that the presence of four management roles is what makes an organization reach the lifecycle stage of Prime where it is both efficiency and effective in both the short run and long run; this research aims to further describe the extent to which leadership indeed contributes to lifecycle growth for the entire school.[5] The research literature has applied the Adizes program in a number of other industries, but this is the first doctoral research seeking to validate the work of Adizes in the classical Christian schooling movement. For example, John Spillan and Howard Ling do a single historical case study of a corporation using the Adizes lifecyles.[6] They helpfully analyze the stages

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[3] Because of the idiosyncratic nature of the courtship stage, no "courtship" case study school was included in this research. Schools in this stage are also difficult to study because the researcher must measure the leadership team and their plans because the school does not exist yet. Schools in courtship are courting the idea of starting a school, but the school has not yet been born. Instead of including a case study school in this planning stage, this research inquires into how these schools were founded to determine if there is any correlation with how a school starts and the path it takes through the organizational lifecycle.

[4] John W. Creswell and J. David Creswell, *Research Design: Qualitative, Quantitative, and Mixed Methods Approaches*, 5th ed. (Los Angeles: Sage Publications, 2018), 247.

[5] Adizes, *The Ideal Executive*, 26.

[6] John E. Spillan and Howard G. Ling, "Woolworths: An Adizes Corporate Lifecycle Perspective," in *Business History Conference. Business and Economic History On-Line: Papers Presented*

that Woolworths went through in their organizational history, which is a single case analysis instead of the multiple case analysis like this study. A handful of researchers have applied fragments of the Adizes program to the field of education. Dehkordi, Nikkah, and Montazarealzohour surveyed medical school administrators on their decision making using the Adizes PAEI code to analyze which management deficiencies existed at a medical school.[7] Valand and Bjørkkjær studied the teamwork of undergraduate students at the University of Agder in Norway using the PAEI code from Adizes.[8] The issue with these studies is that they are not using both the PAEI management code and the lifecycle descriptions in synchronized fashion but are separating them. This is problematic because the unique contribution of Adizes is the link between lifecycle stage and leadership style (PAEI code).[9]

Although the research on Christian organizations using Adizes remains unpublished, the Adizes program was used in the early 1990s by CRU in Canada, formerly known as Campus Crusade for Christ. Adizes Associate Barry Bowater shares, "While working at CRU, we watched all of the Adizes videos and then had an Adizes Associate

at the BHC Annual Meeting (Wilmington, DE: Business History Conference, 2015), 13:1-11. This case study of one business is similar to the case reports shown later in this research on the multiple schools.

[7] Seyedeh Fatemeh Rafiei Dehkordi, Mohammad Nikkhah, and Ferdos Montazeralzohour, "Investigating the Decision-Making Practices of the Research and Education Managers of Shahrekord University of Medical Sciences Based on the PAEI Model of Adizes Theory," *Journal of Shahrekord University of Medical Sciences* 20, no. 5 (2019): 8. Although their research sought to understand the decision-making of educational administrators, they did not correlate the PAEI code with the organizational lifecycle but rather focused purely on the decision-making of the administrators. This research uses a case study methodology instead of surveys and focuses on the entire institution, not just the managers."

[8] Ida Ulrikke Valand and Tormod Bjørkkj, "Impact of Adizes's Team Roles on Collaboration, Disagreements, and Success in Student Enterprises—Teamwork Pedagogy in Higher Education," *Journal of the International Society for Teacher Education* 23, no. 2 (2019): 14. Their study looks at students within learning groups using teamwork pedagogy as opposed to management of the school. It also does not use the case study methodology.

[9] Lawrence M. Miller, *Barbarians to Bureaucrats: Corporate Life Cycle Strategies: Lessons from the Rise and Fall of Civilizations* (New York: Fawcett Columbine, 1990). Miller identifies a similar correlation yet is less prescriptive in his methodology. He primarily wants to describe, whereas Adizes wants to diagnose and then integrate the broken parts into a new whole.

come out for a three-day retreat to work with our team."[10] Although there is precedent for the Adizes program in education and in Christian organizations, no work has been done to study the applications of the Adizes paradigm for leadership throughout the lifecycle in classical Christian schools. This dissertation seeks to take an initial step toward filling that gap in the literature.

Adizes has established himself as both a scholar and practitioner. Now toward the end of his career in 2021, his legacy will live on through the Adizes Institute, a multinational service organization that has been certifying organizational therapists since the 1970s.[11] The history of the Adizes Institute goes back to the spring of 1966, when Ichak Adizes, as part of his doctoral dissertation in business at Columbia University, studied the Yugoslav industrial democracy-management system. The Yugoslavian democratic approach to management was in stark contrast to the top-down management style used in the United States. In studying these two approaches and evaluating their relative strengths and weaknesses, the Adizes approach to organizational transformation was first conceived. In 1971, *Industrial Democracy: Yugoslav Style* was published to much acclaim and was immediately translated into many languages establishing Adizes as an expert on the subject of the democratization of organizations.[12]

Adizes's vision, from the beginning of his research, was to scale his ideas across industries and across the world. In 1971, Adizes established the Management Development and Organizational Research (MDOR) Institute where he served clients as a consultant and the application of the methodologies were first tested and refined. By 1979, the name

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[10] Barry Bowater, Zoom meeting with author, September 22, 2021. In Bowater's bio (https://adizes.pl/barry-bowater/), his extensive work with Christian organizations using Adizes includes CRU, Youth for Christ, and Christian Embassy in Ottawa. Bowater's work goes beyond the faith-based sector and also worked with the Canadian government and industries in Ireland.

[11] Adizes Institute Worldwide, "About," accessed October 2, 2021, https://adizes.com/about/.

[12] Ichak Adizes, *Industrial Democracy: Yugoslav Style* (Santa Barbara, CA: Adizes Institute, 1971).

MDOR Institute was changed to the Adizes Institute and Adizes had already begun publishing more books. As his popularity grew in the early 1980s, he resigned at UCLA Graduate School of Management to dedicate more of his time to developing and documenting the Adizes Methodology.[13]

The Adizes lifecycle framework is useful for scholar-practitioners because of its wide-reaching applications across industries and lifecycle stages. Adizes first started training and certifying others in the Adizes Methodology as far back as 1977. Since then, hundreds of individuals have been trained and certified in the Adizes Methodology, establishing offices around the world.[14] Adizes has written twenty books that have been translated into twenty-six languages, and he has been awarded seventeen honorary doctorates. His principles have been applied in hundreds of corporations, governments, and churches worldwide.[15] However, no peer-reviewed research has been completed to document the applications of his work in the classical Christian schooling space. This researcher utilized the Adizes lifecycle and leadership theories on multiple classical Christian schools to understand the anatomy of school growth.

As mentioned in chapter 1, the classical Christian schooling movement in America appears to be past the Go-Go stage and into its early Adolescence. This time of early adolescence has seen an outpouring of doctoral works pertaining to classical Christian education, such as "A Comparative Analysis of the Integration of Faith and Learning Between ACSI and ACCS Accredited Schools" (2012) by Daniel Peterson[16]; "Leading Classical Christian Schools: An Exploratory Study of Headmasters" (2011) by Eileen

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[13] Adizes Institute Worldwide, "About."

[14] Adizes Institute Worldwide, "About."

[15] Adizes Institute Worldwide, "About."

[16] Daniel Carl Peterson, "A Comparative Analysis of the Integration of Faith and Learning between ACSI and ACCS Accredited Schools" (PhD diss., The Southern Baptist Theological Seminary, 2012).

Council, Bruce Cooper, and Kendra Deboer[17]; "Leading Classical Christian Schools: Job Satisfaction, Job Efficacy, and Career Aspirations" (2010) by Eileen Dietrich[18]; "Teacher Self-Efficacy in a Classical Christian Environment versus a Traditional Christian Environment" (2016) by Emily Anderson[19]; "The Effect of Team Sports in Classical, Christian Education" (2018) by Hannah Grey[20]; "Wisdom, Eloquence, and Academic Rigor in ACCS Schools: A Mixed Methods Study" (2019) by Chase Austin[21]; "Spiritual Formation: A Comparative Study of Modern and Classical Christian Schools" (2013) by Timothy Dernlan[22]; "Classical Christian Education and Racial Representation: A Mixed Methods Study" (2019) by Miranda Webster[23]; and "Understanding the Influence of Secondary Classical Christian Education on Faith Adherence Experiences of High School Alumni: A Mixed Methods Study" (2020) by Matthew Breazeale.[24]

Although much has been written about classical Christian schooling, relatively little has been written about leadership or lifecycles within the movement with the

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[17] Eileen J. Council, Bruce S. Cooper, and Kendra Deboer, "Leading Classical Christian Schools: An Exploratory Study of Headmasters," *Journal of Research on Christian Education* 20, no. 2 (2011): 117-37.

[18] Eileen Joy Dietrich, "Leading Classical Christian Schools: Job Satisfaction, Job Efficacy, and Career Aspirations" (EdD diss., Fordham University, 2010).

[19] Emily Rose Anderson, "Teacher Self-Efficacy in a Classical Christian Environment versus a Traditional Christian Environment" (PhD diss., Liberty University, 2016).

[20] Hannah Grey, "The Effect of Team Sports in Classical, Christian Education" (PhD diss., Liberty University, 2018).

[21] Chase Tolliver Austin, "Wisdom, Eloquence, and Academic Rigor in ACCS Schools: A Mixed Methods Study" (PhD diss., The Southern Baptist Theological Seminary, 2019).

[22] Timothy James Dernlan, "Spiritual Formation: A Comparative Study of Modern and Classical Christian Schools" (PhD diss., Ashland University, 2013).

[23] Miranda Renea Webster, "Classical Christian Education and Racial Representation: A Mixed Method Study" (PhD diss., The Southern Baptist Theological Seminary, 2019).

[24] Matthew Aaron Breazeale, "Understanding the Influence of Secondary Classical Christian Education on Faith Adherence Experiences of High School Alumni: A Mixed Methods Study" (PhD diss., Drexel University, 2020).

exception of Dietrich's "Leading Classical Christian Schools: Job satisfaction, job efficacy, and career aspirations"[25] and Council, Cooper, and Deboer's work in "Leading classical Christian Schools: An Exploratory Study of Headmasters."[26] Both of these resources refer to the need for support for the leaders of this growing movement. This research has taken their recommendations and is focused on studying the leadership and growth of classical Christian schools through a multiple case methodology using the Adizes program.

In the Adizes program, as outlined in the *Ideal Executive: Why You Cannot Be One and What to Do About It*, the link between the entire movement's behavior can be traced back to the presence or absence of four management types.[27] At this stage in the classical Christian schooling movement, there appears to be deficiency in administrative (A) and integrative (I) management. The deficiencies in integrative management and administrative management deal with efficiency in the short-term and the long-term. The administrative management type is focused on efficiency in the short-term. While the producing (aka performing) role focuses on what to do to be effective in the short-term, the administering role focuses on how to do things to become more efficient in the short-term. The administering role is developed by the activities and functions directed at getting operations organized, planned, scheduled, systematized, and generally under control by capturing the learning curve about how to do things right in processes, procedures, and systems.[28]

The classical Christian movement as a whole has been strong on productive management as well as entrepreneurial vision. Moreover, the classical Christian movement has demonstrated a strong integrative management component in its approach to

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[25] Dietrich, "Leading Classical Christian Schools."

[26] Council, Cooper, and Deboer, "Leading Classical Christian Schools," 117-37.

[27] Adizes, *The Ideal Executive*.

[28] Adizes, *The Ideal Executive*, 34.

curriculum, instruction, assessment, theology, and philosophy, but has shown less fruit in the institutional integrative management role, as evidenced by the small number of accredited schools and the large number of schools stuck at K-8. The Integrating role focuses on the development of a cohesive team that makes the movement efficient over the long term. Movements that are well-integrated have a pervasive and persistent culture of mutual trust and respect.[29]

Before choosing the Adizes lifecycle model, several other theories and models were examined but were all dismissed because they did not meet at least one of the essential criteria for this multiple case study methodology of classical Christian schools. Other models considered include *Barbarians to Bureaucrats,* Greiner's model in "Evolution and Revolution," *Nonprofit Lifecycles Stage-Based Wisdom*, *Five Life Stages of Nonprofit Organizations*, Kotter's change theory, Drucker's work on nonprofits, Lewin's change theory, and church growth literature.[30] The Adizes lifecycle model met all three criteria that this researcher used for selecting a model to be tested on the classical Christian schooling movement. These criteria were formed based upon the signature pedagogy of the EdD program at Southern Seminary.[31]

Table 2. Criteria for lifecycle model selection

	Term	Description

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[29] Ichak Adizes, *The Pursuit of Prime: Maximize Your Company's Success with the Adizes Program* (Santa Barbara, CA: Adizes Institute, 2005), 6.

[30] Miller, *Barbarians to Bureaucrats*; Larry E. Greiner, "Evolution and Revolution as Organizations Grow," *Harvard Business Review*, May-June 1998, https://hbr.org/1998/05/evolution-and-revolution-as-organizations-grow; Susan Kenny Stevens, *Nonprofit Lifecycles: Stage-Based Wisdom for Nonprofit Capacity* (St. Paul, MN: Stagewise Enterprises, 2001); Judith Sharken Simon, *Five Life Stages: Where You Are, Where You're Going, and What to Expect When You Get There* (St. Paul, MN: Turner, 2001); John P. Kotter, *Leading Change* (Boston: Harvard Business Press, 2012); Peter Ferdinand Drucker, *Managing the Nonprofit Organization* (New York: HarperCollins, 1990); Bernard Burnes, "The Origins of Lewin's Three-Step Model of Change," *The Journal of Applied Behavioral Science* 56, no. 1 (March 2020): 32-59; Carl F. George and Warren Bird, *How to Break Growth Barriers: Revise Your Role, Release Your People, and Capture Overlooked Opportunities for Your Church* (Grand Rapids: Baker, 2017).

[31] School of Theology and Billy Graham School of Missions, Evangelism, and Ministry, *Ed.D Program Handbook* (Louisville: Southern Baptist Theological Seminary, 2017).

1	Scholarly	cited by other authors in peer-reviewed research
2	Practical	used by leaders in the academy, the church, and in the world
3	Contextual	applicable to the researcher in a classical Christian school setting

Adizes is familiar with the nonprofit space as evidenced by his work with performing arts organizations. Moreover, Adizes's footnotes at the end of chapter 1 of *Managing Corporate Lifecycles* mentioned almost every author that this researcher had been studying to understand leadership throughout the lifecycle.[32] Finally, Duane Brown's work studying leadership throughout the lifecycle of the Wesleyan Church movement using Adizes provided additional evidence of the far-reaching applications of Adizes.[33]

Theological and Philosophical Foundations of Prime

How should a Christ-centered and classical educational institution measure its success? To what standards should these institutions be held accountable? Are enrollment, endowment, buildings, and budgets all worldly endeavors that serve to distract boards and heads of school? Is the test of leadership success simply faithfulness to God as measured by integrity, spiritual disciplines, and love toward neighbor, or do institutional performance indicators play a role? Although Ichak Adizes does not write from an explicitly Christian perspective, the complementarian nature of his leadership model makes it a useful tool for heads of school, boards, and school administrators. The goal of this section of the literature review is to examine whether Adizes's term Prime is consistent with a biblical definition of fruitfulness.

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[32] Ichak Adizes, *Managing Corporate Lifecycles* (Santa Barbara, CA: Adizes Institute, 2004), 15-19.

[33] Duane E. Brown, "Life beyond the Launch: Case Studies in Post-Launch Vitality, Adaptation, and Identity Formation of New Wesleyan Congregations" (PhD diss., Asbury Theological Seminary, 2009). This dissertation examines the post-launch lifecycle stage of ten selected new churches launched from 1996-2005 within the Wesleyan Church of North America. The purpose of the study is to better understand the factors of vitality for the pivotal post-launch stage of church planting within Wesleyan church-planting movements.

For Adizes, Prime simply means that the organization is both effective and efficient in the short-run and the long-run. Effectiveness is the degree to which management is fruitful in results in the short-term through satisfying the customer needs and the organization's purpose. To be effective also entails fruitfulness in long-term through entrepreneurial foresight and a willingness to take risks. Efficiency is the degree to which management is fruitful in processes in the short-term through administering procedures and through integrating the people with those processes in the long-term to create a culture of mutual trust and respect.[34] Prime is the optimal condition of the lifecycle, the achievement of a balance between self-control and flexibility.

According to Adizes, to hit the stage of prime, four management conditions must be present. Much of Adizes's thought was crystalized in the late 1960s while he was completing his doctorate on industrial democracy in Yugoslavia. He writes,

> Observing organizational behavior in Yugoslavia, I discovered that if a certain role of management, say entrepreneurship, is suppressed, organizations develop certain predictable management "diseases." . . . The point is that I discovered a diagnostic and therapeutic methodology. Because I could see the relationship between each role and specific kinds of organizational behavior, I was able to identify which role deficiency causes which managerial diseases.[35]

The beating heart behind this research is the causal connection between role deficiency, managerial disease, and organizational behavior. Adizes's link between lifecycle and leadership stands alone in this regard. In socialist Yugoslavia, Adizes noted that shared ownership of property eliminated the entrepreneurial spirit and prevented companies from advancing forward to their full potential.[36] Adizes sees the four management styles like four vitamins that enable an organization to reach the optimal state of organizational health, Prime. Table 3 below demonstrates the four management conditions to be present.

[34] Adizes, *Mastering Change*.

[35] Adizes, *Managing Corporate Lifecycles*, 18.

[36] Adizes, *Industrial Democracy*.

Table 3. The PAEI code

Dominant Management Role	Makes the organization	Time range
Purposeful Producer	Efficient	Long run
Entrepreneurial	Effective	Long run
Administrative	Efficient	Short run
Integrative	Effective	Short run

Is Adizes description of Prime helpful for leadership throughout the lifecycle in classical Christian schools? Yes, because Prime accounts for character, conditions in the educational marketplace, the local community of families, and the competence of school leadership. In an article on judging the effectiveness of ministers, Timothy Keller writes,

> A biblical gauge for ministerial evaluation would be neither faithfulness nor success but fruitfulness—Paul uses this criterion (Romans 1:13 "that I might have some fruit among you") and to see the growth of godly character (Gal 5:22 fruit of the spirit and Rom 15:25-27 good deeds called fruit). The doctrine of election assures fruit (Acts 18:9-10, Acts 13:48, John 15:16).[37]

The biblical witness of fruitfulness accounts for both individual character via the fruit of the Spirit (Gal 5:22) and effectiveness in cultivating results in others (Rom 1:13).

Paul's words in 1 Corinthians 3:6 (I planted, Apollos watered, but God gave the growth) must be considered before the Adizes methodology can be deployed in a Christian context. In his commentary on 1 Corinthians, Thomas Schreiner observes that there were major divisions within the Corinthian congregation over the perceived rhetorical effectiveness of Paul compared to Apollos: "Strife was precipitated by evaluating the rhetorical ability of different ministers."[38] The first century context obsessed over rhetorical style much like contemporary followers might obsess over an individual's organizational leadership style. Schreiner continues, "Differences exist among scholars regarding specifics, but there is remarkable agreement that Paul criticizes a dependence

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[37] Timothy Keller, "Ministry and Character," Redeemer City to City, accessed April 8, 2021, https://redeemercitytocity.com/articles-stories/ministry-and-character.

[38] Thomas. R. Schreiner, *1 Corinthians*, The Tyndale New Testament Commentary, vol. 7 (Westmont, IL: IVP, 2018), 38.

upon Greek rhetoric here. Winter argues that it was the Second Sophistic movement that existed in the first century to which the Corinthians were attracted and which Paul resists."[39] The Corinthians' attention to rhetoric rather than God's sovereign activity is evidence of their immaturity. Schreiner writes, "The Corinthians believed their partisanship reflected their spiritual perception, but Paul says that it points to their spiritual poverty; they are actually living on a human level instead of relying on the Holy Spirit."[40] The social scientific study of leadership, due to its positivistic assumptions about human nature, tends to prioritize observable human experience and marginalize authoritative divine revelation. This is relevant to the Corinthians' overemphasis on human rhetoric because the Adizes methodology could, in like manner, exclusively attribute organizational growth due to human management rather than divine sovereignty. For this reason, this research has sought to identify the contributions that leaders can make to organizational growth in the lifecycle rather than to identify a determinative causal relationship from merely a human perspective.[41]

Although Adizes identifies complementary leadership as fundamental to growth, he, like the spiritually immature Corinthians, does not see God behind the growth. Humans are the immediate earthly conduits, not the ultimate divine cause. Schreiner states, "It does not follow that the work of Paul and Apollos was uniform. The diversity of ministries does not contradict but accords with the Lord's work in Paul and Apollos. The growth in ministries comes from God, though the particular ministries exercised by Paul and Apollos

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[39] Schreiner, *1 Corinthians*, 39.

[40] Schreiner, *1 Corinthians*, 40.

[41] The word contribution better acknowledges the divine sovereignty and human responsibility component of human leadership. When Paul wrote, "I planted, Apollos watered, but God gave the growth" (1 Cor 3:6), it seems that his intention was to correct the Corinthians' narrow perspective of only focusing on particular human characteristics. The Corinthian problem is also evident in Adizes in the sense that his methodology is correlating growth in the lifecycle with humanly observable management styles. Although Adizes does not explicitly acknowledge the sovereignty of God in all human and organizational growth, his framework is still usable.

were distinct."[42] Craig Keener expresses the same idea: "The focus must not be individual ministers but God who gives growth."[43] David Prior, in his commentary on 1 Corinthians, makes the explicit connection to leadership as well: "They were far too ready to put the spotlight on individuals, to play one off against another, to compare this person with that person. They needed straight teaching on the nature and the function of Christian leadership."[44] This is significant for the correlation Adizes makes between PAEI management styles and overall organizational growth and how this theory is challenged in the multiple case study design with classical Christian schools.

Adizes identifies PAEI as the four critical roles needed to reach Prime. He asserts that a culture of mutual respect and trust is critical for achieving a complementary model. It seems that Adizes is striving for respect and trust being the ultimate power rather than a connection to a sovereign God. Prior states,

> They [the Corinthians] were constantly looking over their shoulders at one another, envying the gifts of others. There was little love at Corinth, only competitiveness. There was no appreciation of the different contributions brought under God by people like Paul himself and Apollos—only breaking off into cliques and refusing to mix with certain people of different views.[45]

Those planting and those watering are both completely dependent upon God and on one another. When school leaders acknowledge that they are dependent on both God and one another, it removes the opportunity for unhealthy pride, competition, and envy, and leads to productive collaboration.

Reformer Wolfgang Musculus expresses similar ideas to Schreiner, Prior, and Keener:

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[42] Schreiner, *1 Corinthians*, 40.

[43] Craig S. Keener, *1-2 Corinthians*, New Cambridge Bible Commentary (Cambridge: Cambridge University Press, 2005), 52.

[44] David Prior, *The Message of 1 Corinthians* (Westmont, IL: InterVarsity, 2020), 38.

[45] Prior, *The Message of 1 Corinthians*, 40.

> This analogy of planting and watering is the most beautiful of all analogies. . . . First, Paul declares the reason for the ministry of the Word, why ministers of Christ are necessary, when he attributes to them planting and watering, thus making them the farmers of his garden and cultivators of the kingdom of heaven, which are their twin functions. . . . The entire ministry is comprised in these two functions, and ministers must be engaged in them constantly.[46]

Musculus saw the entire life of ministry tied to the functions of plating and watering. Paul and Apollos were like runners in a relay race where Paul did the initial running (planting) while Apollos came in after him for the next leg of the relay race (watering) with the leadership of the Corinthian church. To interject Adizes categories in the Corinthian scenario, it seems that Paul oversaw the transition from both Courtship to Infancy and Infancy to Go-Go whereas Apollos helped the Corinthians deal with conflicts of immaturity in their Adolescence.[47] In this sense, the degree of spiritual fruitfulness can be likened to stages in the congregational lifecycle.

Paul speaks explicitly about fruitfulness in Romans 1:13. Paul in Romans 1:13 indicated he wanted to come to Rome to reap some harvest, or fruit, among the Romans. John Calvin writes on this verse: "He no doubt speaks of that fruit, for the gathering of which the Lord sent his Apostles, 'I have chosen you, that ye may go and bring forth fruit, and that your fruit may remain.' (John 15:16.) Though he gathered it not for himself, but for the Lord, he yet calls it his own."[48] Douglas Moo explains,

> With the last clause of v. 13, Paul expresses the purpose of coming to the Romans—to "have a harvest" among the Romans. "Harvest" refers to the product of his apostolic labors (cf. Phil. 1:22), including here probably both an increase in the number of Christians through evangelization "among" the Romans and a strengthening of the faith of the Roman Christians themselves (cf. v. 11b).47.[49]

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[46] Wolfgang Musculus, *First Corinthians*, Reformation Commentary on Scripture (Westmont, IL: InterVarsity, 2017), 87.

[47] Courtship, Infancy, Go-Go, and Adolescence are the first four stages before Prime in Managing Corporate Lifecycles.

[48] John Calvin, "Commentary on Romans," accessed October 21, 2021, https://www.ccel.org/ccel/calvin/calcom38.html, 445.

[49] Douglas J. Moo, *The Epistle to the Romans* (Grand Rapids: Eerdmans, 1996), 43.

"Fruitfulness" is a helpful term for understanding Prime in classical Christian schools because it aligns with the Pauline idea of reaping a spiritual harvest among a people.

Fruitfulness is not mechanical. The purpose of the classical Christian schooling movement is to produce a certain type of student, which is an organic process, not a mechanistic or industrial one. Therefore, teachers must ensure that learning happens with their students. To judge a teacher by faithfulness alone would mean that the administration would have little to no concern for student learning outcomes academically or spiritually but was only preoccupied with the dutiful activities of the teacher in praying, planning, and instructing. On the other end of the spectrum, the administration could only be concerned with numeric success like GPA, college placement data, assessment scores, professions of faith, church attendance, student retention, and total enrollment. The biblical use of the term *fruitfulness* is ideal for the classical Christian movement because it avoids the ditches of a "faithfulness alone" criterion on one hand and the error of a "success alone" criterion on the other.[50]

The tension to choose between success or faithfulness is not unique to the contemporary educational moment. Charles Spurgeon writes,

> It takes more than faithfulness to make a minister: Certain good men appeal to me who are distinguished by enormous passion and zeal, a conspicuous absence of brains; brethren who would talk forever and upon nothing— who would stamp and thump the Bible, and get nothing of it all; earnest, awfully earnest, mountains in labor of the most painful kind; but nothing comes of it all. . . . Therefore I have usually declined their applications.[51]

Charles Spurgeon exposes the poverty of only evaluating ministers based upon faithfulness and instead proposing that performance matters too. As mentioned, *fruitfulness* is the term that captures this essence, and it is critical in every phase of the lifecycle that classical

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[50] In Matthew 25, in the parable of the talents, the word "faithful" is used in a way that accords with what I mean by "fruitful" because the faithful steward is the one who invests and gets a return on his master's resources. The idea of return on investment is thus used in a way that is avoiding the modern ditches that I am seeking to avoid in this research.

[51] Charles H. Spurgeon, "Lectures to My Students: Volume 1," accessed October 21, 2021, https://www.google.com/books/edition/Lectures_to_my_students/SXtP6DSz_fUC?hl=en&gbpv=1&printsec=frontcover.

Christian school leaders evaluate themselves by more than numeric success or faithfulness, but instead capture the metrics of efficiency and effectiveness in both the short-term and the long-term. To be both efficient and effective in the short-term and long-term is what Adizes means for an institution to be in its Prime.

Complementary leadership was not Adizes's idea but was first evident in the body of Christ metaphors in 1 Corinthians 3 (the field, the temple), Ephesians 4 (the body), 1 Corinthians 12 (the body), and Romans 12 (the body). Adizes's PAEI framework for complementary leadership provides a trellis on which the vine of the classical Christian schooling movement can fruitfully grow.[52] One way that the Adizes program is strikingly consistent with regard to internal cohesion and biblical leadership is revealed in *The Ideal Executive: Why You Cannot Be One and What to Do About It*. Adizes outright dismisses the idea in modern management that one person can do it all, which accords well with 1 Corinthians 3:6: "I planted, Apollos watered, but God gave the growth." Paul and Apollos are complementary in their different stages of the Corinthian church congregational lifecycle. In fact, Paul even refers to the Corinthians as spiritual infants in both chapter 3 and 14 because of their focus on earthly teachers and the division its causing.[53] Although Paul's idea of congregational infancy refers to their collective spiritual maturity, it does bear similarities with Adizes's concept of organizational infancy where the life of the organization is totally dependent upon the life of the founders. In both cases, a set of corporate behaviors indicate certain deficiencies.

Another Adizes idea that was first evident in Scripture is that every living thing has a lifecycle in which it is born, grows, ages, and eventually dies. This idea of lifecycle stages is evident in 1 Corinthians 3:6 where Paul writes, "I planted, Apollos watered, but God gave the growth." Acts 18 is the story of where Paul took the Corinthian church from

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[52] Colin Marshall and Tony Payne, *The Trellis and the Vine: The Ministry Mind-Shift That Changes Everything* (Boardman, OH: Matthias, 2009).

[53] If the Corinthians were to use the Adizes methodology, they would see that they were in a founder's dilemma where the church struggled to break free from the style of its founding leader.

the stage of Courtship to its Infancy through the conversion of Crispus the synagogue ruler (Acts 18:8). Paul uses an agricultural metaphor and likens his own work in Corinth to planting seeds and Apollos' work to watering those seeds and nurturing the church from infancy to later stages. It is clear though that the Corinthian church is still in a stage of spiritual immaturity as evidenced by his use of the word infant in 1 Corinthians 3:1 and 1 Corinthians 14:20.[54] This idea of spiritual infancy is also evident in Hebrews 5:13 ("for everyone who lives on milk is unskilled in the word of righteousness, since he is a child"), 1 Peter 2:2 ("Like newborn infants, long for the pure spiritual milk, that by it you may grow up into salvation), and Ephesians 4:14 ("so that we may no longer be children, tossed to and fro"). One aspect of classical Christian education that is similar to local church ministry is that the student is a living being and can be influenced, inspired, and instructed but not manufactured, produced, or assembled.[55]

The Adizes methodology on leadership throughout the lifecycle is worthy of both commendation and caution. As far as commendation, Adizes is accurately describing from a sociological perspective the way in which individuals form institutions and the institutions advance through various stages of development marked by certain leadership styles and particular stage-specific problems. John David Trentham writes, "Blindness to saving truth does not entail blindness to all truth."[56] Not only does Adizes accurately observe with penetrating insight the lifecycle progression, but he rightly dismantles the myth of the ideal executive by extolling the virtues of complementary management styles with the PAEI code. This bears similarities with the metaphor of the body of Christ in 1

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[54] Unless otherwise noted, all Scripture quotations come from the English Standard Version.

[55] Modern American management paradigms love efficiency and reporting results in the short-term. Because of Adizes's personal background as well as his international professional experience, his writing has much different emphases than those of contemporary management authors in America. Therefore, there is a greater appreciation for the ancient worldview depicted in Scripture.

[56] John David Trentham, "Reading the Social Sciences Theologically (Part 1): Approaching and Qualifying Models of Human Development," *Christian Education Journal* 16, no. 3 (2019): 464.

Corinthians 12, Romans 12, and Ephesians 4 where the diverse members of the body serve under unified purpose. In this sense, Adizes makes commendable insights that align from a temporal perspective with redemptive patterns of human behavior.[57] Although Adizes merits commendation for his insights, his interpretations about ultimate reality require caution. Adizes does not acknowledge the theological interpretive categories to understand that God ultimately gives the growth (1 Cor 3:6-7). He makes accurate insights about how leadership and growth move together throughout the lifecycle, but his methodology is not interested in the principles of divine sovereignty that undergird his methodology.

The Adizes methodology and the term Prime accord not only with the theology behind the classical Christian movement but also with its educational philosophy. The cult of efficiency has been a major force for the weakening of American education and has led to the emergence of the classical Christian movement.[58] Adizes understands the issues with an efficiency-only approach to management that modern education has failed to recognize. There are at least four problems with an efficiency-only approach to educational leadership outlined by Glenn Hewit in reviewing its impact on churches in Florida.[59] His insights on the corrupting influence of efficiency have application for education as well. First, the goal for a classical Christian leader is not to hear well-done good and efficient servant, but well done good and faithful servant (Matt 25:23).[60] Second, the example of

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[57] Trentham, "Reading the Social Sciences Theologically (Part 1)."

[58] Raymond E. Callahan, *Education and the Cult of Efficiency* (Chicago: University of Chicago Press, 1962).

[59] Glenn Hewitt, "The Efficiency Movement in Florida Baptist History," accessed October 21, 2021, http://floridabaptisthistory.org/wp-content/uploads/2017/08/efficiency_movement.pdf, 11.

[60] The way that Matthew here uses the term "faithful" does not negate what has already been said about the problems with faithfulness-alone criteria because of the way in which he is using the term with the parable of the talents. The faithful servant is the one who invests his talents for his master and gets a return on his master's investment. This is the same idea that the term "fruitfulness" conveys so there is no issue with Matthew's use of "faithfulness" when the content of the parable is considered. A return on investment of certain talents resonates with the idea of fruitfulness.

Mary is superior to that of Martha despite Martha's efficiency (Luke 10:38-42). Third, the fruit of the spirit are love, joy, peace, patience, etc., not efficiency (Gal 5:22-23). Fourth, Jesus did not teach on any doctrine of efficiency but rather showed the importance of love over efficiency. Jesus does not want us to be wasteful—after all, he did collect twelve baskets of leftovers—but he reprimanded Judas for objecting to the use of costly perfume in anointing him (John 12:5-8). All of this is consistent with the outcomes achieved by ACCS alumni as shown in the Good Soils Report.[61]

Although the Adizes program would fall into the contemporary category of social sciences in the modern educational curriculum, this sort of thinking would be placed into moral philosophy within the classical curriculum. Within the field of moral philosophy would be economics, ethics, and political science. The Adizes program is an important field of knowledge, or *scientia* in the ancient Latin. According to Aristotle, *scientia* (or *episteme* in the Greek) referred to "a demonstrable knowledge of causes."[62] The Adizes methodology asserts that four management roles are the invisible relationships behind the appearances seen in organizations. Adizes falls short here philosophically from a classical perspective because his notion of cause is limited to only what is empirically observable (PAEI). For Aristotle, there were four causes: the material, formal, final, and efficient. Table 4 shows these causes.

Table 4. Aristotle's four causes

Aristotle's Four Causes	
Material	What is the phenomenon made of?
Formal	What is the essence of the phenomenon?
Final	What is the phenomenon's purpose?

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[61] The Classical Difference, "Good Soil: A Comparative View," accessed October 20, 2021, https://www.classicaldifference.com/good-soil/.

[62] Kevin Clark and Ravi Jain, *The Liberal Arts Tradition: A Philosophy of Christian Classical Education* (Camp Hill, PA: Classical Academic, 2019), 8. The three branches of philosophy (the unity of knowledge that covers all subjects) are natural (the physical sciences), moral (social sciences: political science, economics, psychology, sociology, ethics, etc.) and divine (metaphysics, theology, aesthetics). All the areas of truth in the ancient curriculum were integrated into a holistic wisdom.

| Efficient | What made this phenomenon occur? |

Unlike many contemporary management thinkers, Adizes does account for the "final cause" in his lifecycle and leadership framework by his definition of the Purposeful Producer management role. He asserts that the organization must produce results that align with its overall *telos*, or reason for existence. In fact, Adizes sometimes refers to the Producer role as the Purposeful Performer. However, he does not adequately account for Aristotle's "formal cause" because he does not correctly diagnose what a human is and what a human is for. Adizes regularly likens humans with plants and other biological systems rather than acknowledging that they are made in the image and likeness of God and are the pinnacle of His creation. Like Adam Smith and Machiavelli, he patterns his understanding of human beings after natural sciences and is only concerned with his observations of how humans behave. This researcher agrees with Kevin Clark and Ravi Jain's goal that "all four of these causes should be recovered in order to restore a holistic approach to natural, moral, and divine philosophy. When science is understood merely as technology, it only cares about how to control things. It does not care about what a thing is and what its purpose is in God's broader creation."[63] By neglecting to account for the nature of a human being, the Adizes program could be used to increase the efficiency and effectiveness of organizations in the short and long run for evil groups like the Nazi regime or an underground sex-trafficking racket. All that to say, the Adizes methodology is not ultimately grounded in a biblical anthropology. Despite its disorientation, discontinuity, and disorder from ultimate eternal purposes concerning the nature and purpose of man, the Adizes program can be productively appropriated in a classical Christian context.

[63] Jain and Clark, *The Liberal Arts Tradition*, 9.

Moreover, the term Prime accords with the biblical ideal of fruitfulness even though it falls short in an ultimate sense.[64]

In conclusion, none of the flaws of the Adizes's program are fatal. Adizes credits "change" as the source of all organizational problems when it is clear from Scripture that many of humanity's problems come from human sinfulness. Humanity's biggest problems stem from man's declaration of independence from his Creator. Adizes also has an evolutionary perspective on humanity and does not see a sovereign God as the unchanging source of all change in organizations and in human history. The beauty of his methodology, as has been shown, is the complementary nature of leadership due to various spiritual giftings as well as the acknowledgement that leadership is not a lone marathon but a relay race. John David Trentham describes this tension well: "Of course, confessional Christianity insists the light of nature may never contradict the light of Scripture. True knowledge may be extra-biblical; it may never be unbiblical. The book of Scripture thus always takes interpretive priority in the exegesis of the book of nature. This is to say that Scripture is normative."[65] It is possible and even advisable for classical Christian schools who are grounded in a biblical idea of fruitfulness and governed by a theological framework to be guided by the extra-biblical light of Adizes in their journey toward Prime.

Beginning the Journey: Courtship, Infancy, and Go-Go

The remaining sections of this literature review correspond to the research questions on the leadership contributions to organizational growth in classical Christian schools. While the first sections corresponded to the background of Adizes and philosophical considerations, these sections provide the categorical Adizes knowledge to understand chapters 3 through 5 of this research. Classical Christian schools appear along

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[64] John David Trentham, "Reading the Social Sciences Theologically (Part 2): Engaging and Appropriating Models of Human Development," *Christian Education Journal* 16, no. 3 (December 2019): 476-94.

[65] Trentham, "Reading the Social Sciences Theologically (Part 2)," 484.

a spectrum of maturity known as the lifecycle. While it is convenient to categorize a school's stage in the lifecycle based upon numeric success (budget, enrollment, building, square footage, age, etc.), the first section of the literature review has demonstrated that numeric success or faithfulness alone are inadequate measures to evaluate the lifecycle stage of a school. Based upon a biblical understanding, a better category for maturity is fruitfulness. Adizes's four management styles and lifecycle stages provide helpful boundaries for identifying where a school is in the organizational lifecycle. The utility of the Adizes lifecycle model is that his categories can diagnose where a school is at in maturity on factors other than age or size.

Adizes's laws of organizational transformation provide a summary of the infrastructure of his entire program. The following laws of organizational transformation are most relevant to understanding Courtship, Infancy, and Go-Go:

1. All living systems seek to be effective and efficient in the short and long run.

2. The factors that determine effectiveness and efficiency in the short and long run develop and get integrated in a predictable pattern. That pattern is the lifecycle.

3. Whether the lifecycle will follow the longer typical or shorter optimal route depends on how much Integration the system has; the more Integration it has, the less energy it needs. The more Integration the system has, the shorter the route to Prime will be.

4. As long as there is change, there will be problems. All problems are created by disintegration. (subsystems getting out of synchronization and falling apart).

5. The role of the leaders of organizations is to lead change, to integrate to solve the problems created by change, and to prepare the system for the next disintegration introduced by the next change.[66]

This section of the literature review will further describe the early stages of school growth: Courtship, Infancy, and Go-Go. These terms are used throughout the rest of this multiple case study research to describe the lifecycle stages of schools.

Courtship

The first stage of the organizational lifecycle, entitled Courtship, is where

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[66] Adizes, *Managing Corporate Lifecycles*, 401-2.

founders are focused on dreams and possibilities, but the organization has not yet been born.[67] Although this research contains no case for a classical Christian school in the courtship stage, it is necessary to understand the characteristic problems of this stage because they will show up in Infancy, Go-Go, and Adolescence if not addressed sooner. The normal problems in this stage are over-excitement, uncertainty, and a lack of clarity surrounding several details. Abnormal problems in this stage are low commitment and stalling due to details. The key treatment for nascent schools in the Courtship phase is to develop a founding team with sufficient commitment to carry out their ideas.[68] Courtship is the first phase where the founders are prone to romanticize and idealize what a classical Christian school could look like for their own kids and the kids in their neighborhood. Adizes calls this an affair—lots of enthusiasm but no commitment.[69]

Adizes's prescription for success in this stage is to answer five key questions. The list below presents the five questions with the corresponding management role:

1. Why are we doing this?   Entrepreneur
2. Who is going to do it?   Integrator
3. What exactly are we going to do?   Producer
4. How are we going to do this?   Producer/Administrator
5. When should we do it?   Administrator[70]

The dominating management style in the courtship is that of the entrepreneur who is focused on the opportunities and threats in the future and is willing to take the risks associated with a new endeavor. During the courtship phase, the entrepreneurial management style must be reality-tested before implementation can successfully begin.

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[67] Adizes, *Managing Corporate Lifecycles*, 46.

[68] Adizes, *Managing Corporate Lifecycles*, 49.

[69] Adizes, *Managing Corporate Lifecycles*, 50.

[70] Adizes, *Managing Corporate Lifecycles*, 112.

Many schools in this stage do not subject themselves to adequate reality testing to determine the feasibility of planting a school in their marketplace. The key to moving from Courtship to Infancy is the leader's commitment to bringing together the money, the market, and the good idea. According to Adizes, "Without substantial commitment, organizations break apart when they encounter rough times."[71]

Adizes makes an important point about the difference between a startup entrepreneur and a startup prophet: "Entrepreneurs who start companies focused on needs that have yet to be identified are product-oriented rather than market-oriented."[72] Those courting the idea of starting a school must examine whether there is really an expressed need for classical Christian education in their area. Although there *should* be a need for a classical Christian school, that does not mean that there *is* an expressed need. Those in Courtship must synchronize their idea to launch a school with both the market and the money needed to operate the school. Many school founders have the bent of the prophet where they love dreaming about the future. This is critical in the courtship phase, but the ideas and plans must survive the scrutiny of the market and the challenges of funding. Adizes remarks that the founder should be "someone who has fanatically strong beliefs and is still able to listen to reason."[73]

The basic ingredients of all four PAEI roles must be present at the founding stage for the Courtship to successfully transition into infancy. Although the Entrepreneur management role is the dominant emphasis during the courtship phase, the Performing, Administering, and Integrating roles must be present to reality-test the romantic ideas of the Entrepreneur. The business plan is the artifact that a school must create to ensure that

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[71] Adizes, *Managing Corporate Lifecycles*, 24.

[72] Adizes, *Managing Corporate Lifecycles*, 26.

[73] Adizes, *Managing Corporate Lifecycles*, 27.

they can transition from Courtship to Infancy. Adizes writes, "The seeds of future subsystems must exist at conception."[74]

Certain archetype founders are almost assured to prevent their school from successfully transitioning to Infancy, according to Adizes. In his mismanagement styles, he categorizes the leader who is exclusively entrepreneurial in focus as the "arsonist." The only consideration in the arsonist's managing perspective is effectiveness in the long run without any regard to administrating efficiently in the short-term, performing effectively in the short-term. or integrating efficiently in the long-term. In other words, this person is so concerned with the value of certain ideas that they are completely unaware of the costs that reality imposes on implementing those valuable ideas. Adizes illustrates the arsonist with the image of a high-flying eagle:

> Picture (--E-) as an eagle, flying thousands of feet over the mountains and seeing the big picture but not the small details. From up there everything looks simple; with one movement of its wings it can fly from one boulder to another. The eagle cannot comprehend that down on the ground, in order to make the move from one location to the other, you have to go up and down mountains and canyons.[75]

This is often the description of professors who work in business schools or teaching colleges. They are scholars but not practitioners, because they have not been involved in the implementation stage. A successful transition from Courtship to Infancy involves synchronizing the money, the market, and the mission.

Infancy

The school founder's focus immediately changes from ideas and possibilities to the production of results once students are in the classroom, the faculty and staff are on payroll, and the parents are paying tuition. The biggest issues in the early years of launching a school have to do with fulfilling the bold promises made in the admissions

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[74] Adizes, *Managing Corporate Lifecycles*, 238.

[75] Adizes, *The Ideal Executive*, 103. The code (-E--) should look like this (paEi) to indicate that the management types reach the minimum threshold. The dashes in the arsonist code (-E--) indicate the absence of the other management types. In turn, the organization is set to be inefficient and effective in the long-term but ineffective and inefficient in the short-term. The arsonist management type leads to an affair.

process, hiring and training faculty to deliver the mission, and enrolling enough students to balance the budget. This is not to mention responding to the many issues that happen during a school year with facilities, scheduling, field trips, parent conferences, *et cetera*. During Infancy, the focus changes from generating ideas about the future to producing results in the present. The Production role is similar to the mother with a newborn infant. Adizes writes, "She is always feeding, rocking, and changing her baby."[76] The focus during Infancy is not on the social or cognitive needs for thriving but on the basic human needs for surviving.

Schools in the classical Christian movement are prone to having very different stories regarding their founding. While some schools are a ministry of a local church, others are independent from a local body but were initially funded by a wealthy philanthropist. Moreover, the differences between a rural, urban, or suburban school can be substantial. In most cases, schools in the classical Christian movement are built upon the backs of committed parents that later transition the school to be managed by professional educational leaders in later stages.

Although production is the dominant managerial function in the Infancy stage, it can become dysfunctional if administration, entrepreneurship, and integration are completely absent. Adizes calls this mismanagement style the lone ranger—they hate to deal with uncertainty, alternatives, or ambiguity. They see everything as either black or white.[77] As is demonstrated in the case studies, the structure of school leadership in the infancy stage shows a bias toward the Producer management role. It is not uncommon that the leader of a school in Infancy would wear the title head of school but also do the work of the principal, admissions director, and development director while also

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[76] Adizes, *Managing Corporate Lifecycles*, 240.

[77] Adizes, *The Ideal Executive*, 91.

functionally chairing the board. Moreover, boards in this stage tend to be operational

rather than governing because the administration of the school is under-developed.[78]

Concretizing the institution's purpose is essential during the early years of

infancy. Unless purpose is made clear, external success metrics will likely become the

bottom line for judging effectiveness of leadership. Success is when the organization

performs its purpose. Adizes writes,

> Let's think about the earliest stages of courtship when founders are dreaming about
> starting their organizations. What do they see in the future? Profits? That's possible
> but that's not what gets them out of bed in the morning. They see opportunities to
> make profits. Notice my choice of words: opportunities to make profits. Profit is an
> output; opportunity is the input. We have to focus on the input if we want the output
> to occur.[79]

The opportunities that inspire founders of organizations are the needs in the world that they

know that they can satisfy. Narrow business thinking can easily crowd out fruitfulness

criteria in the Infancy and Go-Go stages.[80]

On first reading, it might seem that this only applies to organizations that make

a profit. However, Adizes goes on to say, "From a managerial point of view, the distinction

between profit and nonprofit organizations is no longer valid. Both organizations have

clients and both organizations, to be effective, must satisfy clients' needs."[81] One evidence

that Adizes's lifecycle and leadership frameworks apply outside the corporate for-profit

world is his study on performing arts organizations that ultimately resulted in the first

Master's program in the world in Management of the Arts at UCLA in 1969.[82]

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[78] Stevens, *Nonprofit Lifecycles*, 16.

[79] Adizes, *Managing Corporate Lifecycles*, 195.

[80] Callahan, *Education and the Cult of Efficiency*, 18.

[81] Adizes, *Managing Corporate Lifecycles*, 195.

[82] Adizes, *Managing Corporate Lifecycles*, 204.

Go-Go

Adizes writes, "Go-Go companies are like babies first learning to crawl. They're into everything."[83] Experiencing some growth gives school leaders confidence to tackle new initiatives like enhancing athletics, launching more academic programming, etc. Schools in this stage are oriented toward growth in enrollment and other results yet lack organizational structures that define who should do what.[84] For a school to expand, it must reinforce the foundation, yet many schools add students, programs, and grades without restructuring and strengthening the operational base. Adizes writes, "Go-Gos are like growing children who keep outgrowing their clothes. Pants that last week were dragging along the floor, this week are barely grazing the ankles."[85] At this stage in the school's development, the management is focused on the world of marketing, admissions, and fundraising as opposed to internal infrastructure, student information systems, budgets, and disciplined attention to detail. Go-Go's are driven by opportunities within their environment rather than driving the opportunities in the environment around them.

The first of these management roles, purposeful performance (aka Producer), is about effectively producing results in the short run. Adizes writes, "If the organization performs the P function, it will be effective because it satisfies the needs for which it exists. We measure effectiveness in terms of repetitive demands for the organization's services."[86] In the Adizes program, he postulates that everything is created for some explicit purpose. For example, a pen's purpose is to write. Although it might also function as a head scratcher, its effectiveness is judged by its ability to write. In like manner, the classical Christian schooling movement exists to teach and train students in the liberal arts within a

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[83] Adizes, *Managing Corporate Lifecycles*, 59.

[84] Adizes, *Managing Corporate Lifecycles*, 59.

[85] Adizes, *Managing Corporate Lifecycles*, 60.

[86] Ichak Adizes, "Corporate Lifecycles," *Executive Excellence* 15, no. 2 (February 1998): 6.

Christian paradigm. Although classical Christian institutions might also provide times of entertainment for students, the ultimate purpose is to educate and not to entertain.

Adizes demonstrates an Aristotelian teleology when he discusses the producer management role: "The lamp is here to shine light so I can type. The food I just ate is to nourish me. The bed across the room is for me to rest and sleep upon. Nothing in life exists for itself. Anything that serves only itself is like cancer which serves no function but death. Some people are cancerous."[87] As mentioned in the section on the philosophical and theological foundations of Prime, this broad definition of the Producer management role entails that the organization never pursue results that are at odds with its ultimate reason for existence. The school exists for students in the community; the bottom line is much bigger than metrics that only benefit the institution.

One issue that plagues schools in Go-Go is the founder's trap where the bottleneck for expansion is at the top in either the board or administrative leadership of the school. This can happen when the parents who founded the school for their kids transition to watching their kids head off to college yet are still on the board. Adizes's language in Go-Go is especially clothed in business language so there is a need to examine the case of a school in Go-Go to determine whether the founder's trap happens in classical Christian schools, and if so, where. During the founder's trap, the school is unable to relieve itself from its dependency on the founder, or an individual leader with tremendous influence. This can occur because the organization is unable to develop the abilities needed to replace the unique skills of the founder. One issue can be the transition from schools who had an operating board than transitions toward being a governing board.[88]

The key to transitioning from Go-Go to Adolescence is moving from entrepreneurial and opportunity-driven management to professional and opportunity driving-management. Go-Go's organize around people instead of organizing around tasks,

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[87] Adizes, *The Ideal Executive*, 211.

[88] Adizes, "Corporate Lifecycles," 6.

so the organization is effective in the short-run but not efficient. Adizes writes, "Instead of allowing the organization to structure around people, people should structure around the organization's needs. Instead of sacrificing the needs of the organization to accommodate people, people now have to accommodate the needs of the organization."[89] This can be an especially hard shift for those who have been at the school for a long-time and love the small and personal feel to the school.

Go-Go is usually a time of expanding in enrollment, which has a few significant impacts on the culture of a classical Christian school. In fact, the transition from one size of school to another could have a bigger impact on a classical Christian school than transitioning to an entirely different educational philosophy. Timothy Keller writes on this phenomenon of "size culture" in churches:

> The difference between how churches of 100 and 1,000 function may be much greater than the difference between a Presbyterian and a Baptist church of the same size. The staff person who goes from a church of 400 to a church of 2,000 is in many ways making a far greater change than if he or she moved from one denomination to another.[90]

The reason for size dynamics is because overall size has an enormous impact on how a church or school makes decisions, how relationships are sustained, how effectiveness is measured, and how roles within the organization are structured. Once a school expands, there is a necessity to understand organizational techniques for hiring, organizational structure, and planning, yet the danger is that the school can drift into being too focused on external success criteria like enrollment, budget, and fundraising, and pay too little attention to outcomes of graduates, the quality of faculty, and the fidelity of the curriculum and programming to the school's classical Christian mission.

As schools grow in size, there is an increasing need to reorganize for better decision-making and implementation. Adizes's perspective on go-go is especially

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[89] Adizes, *Managing Corporate Lifecycles*, 122.

[90] Timothy Keller, "Leadership and Church Size Dynamics," 2006, accessed October 1, 2021, https://seniorpastorcentral.com/wp-content/uploads/2016/11/Tim-Keller-Size-Dynamics.pdf.

relevant to examine how case study schools reacted to the post-covid increases in private school enrollment. The increased enrollment exposed the lack of institutional infrastructure of many classical Christian schools and crossed them into go-go territory. Organizations in go-go cope with their inefficiencies through sporadic attempts at delegation where what they really need is decentralization. Adizes writes, "Decentralization provides a centrifugal force which requires management to impose a centripetal force if it hopes to contain control."[91] In other words, the boards of classical Christian schools must adequately transfer decentralized authority to their heads of school or else they will be the bottleneck to future expansion. In like manner, the heads of school must decentralize to their leadership teams to provide meaningful leadership for ongoing expansion toward adolescence and prime. A classic reason that many organizations stay in Go-Go for too long is the inability or unwillingness for leadership to hand over both responsibility and authority to mid-level management. Separating authority from responsibility is a classic reason for being stuck in Go-Go and succumbing to the founder's trap.[92]

Schools in go-go need to move from absolute monarchy to constitutional monarchy.[93] The founder's trap is often evidenced in the board-head relationship. During go-go, the school needs to move from an absolute monarchy to a constitutional monarchy. This is a difficult system because leadership during the go-go feel as if they are losing control. They need to transfer from having control to having systematic controls, instead of ad hoc information. Depersonalization is key to transferring out of go-go and into adolescence.

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[91] Adizes, "Corporate Lifecycles," 6.

[92] Adizes, *The Ideal Executive*, 93.

[93] Adizes, *Managing Corporate Lifecycles*, 187.

Continuing the Journey: Adolescence and Prime

Adolescence

The key identifying feature to look for in adolescent schools is that they have made it past the founder's trap milestone as evidenced by the presence of decentralized authority. There has been a transition away from absolute dependence upon parents. Adizes writes, "Adolescence is an emotional rebirth: companies find life apart from its founder or from any management that behaves like a founder."[94] Similar to teenagers who earn their driver's license, they are less dependent upon their parents than in their go-go years of pre-teen growth, but they are still not yet out on their own. Although the school that has made it to adolescence may appear to have transitioned toward a new model of leadership, it may only be an administrative structure placed on top of the same cultural assumptions about decision-making and process of implementation from the past. A school in adolescence is structured for stronger conflict and more intense growing pains than in infancy or go-go. The school has gained a level of strength but lacks the wisdom and maturity gained through years of experience. The most similar transition is the transition from courtship to infancy where the school was born. This is why Adizes calls this stage the second birth or the coming of age.[95]

The three principal challenges away from go-go to adolescence are delegation of authority, change of leadership, and goal displacement. Regarding delegation of authority, this move is similar to the transition from absolute monarchy to constitutional monarchy.[96] This is the stage in the organization's history where a revolution would be most likely to happen. Parenting a cute little baby and parenting a teenage daughter are very different tasks. An inability to adjust will bring about abnormal problems and prevent the organization from reaching the stage of prime. If the main leadership is unable to share key

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[94] Adizes, *Managing Corporate Lifecycles*, 77.

[95] Adizes, *Managing Corporate Lifecycles*, 77.

[96] Adizes, *Managing Corporate Lifecycles*, 78.

data for decision-making, train up more leaders, and decentralize key functions, then the organization will succumb to the founder's trap where the "child rebels against the parent."[97]

The second principal challenge in moving from Go-Go to adolescence is the move from entrepreneurial to professional management. The job of the leader during this transition is to solve the main problems of go-go and bring about the bigger and better problems associated with adolescence. Adizes writes, "The new leader should create systems, design compensation packages, redefine roles and responsibilities, and institutionalize a set of rules and policies."[98] Management during go-go is oriented toward expansion and is the age of the producer management style who achieves results aligned with the purpose. When management transitions into dealing with the normal problems associated with adolescence, there is a shift away from the producer who is effective to the administrator who is efficient, which can be a source of great internal tension.[99]

Adizes makes an important distinction when he describes the difference between healthy adolescence and adolescence headed toward a divorce. Adolescence headed toward a divorce is when management tries to reduce the Entrepreneurial function to increase the administrative function of management. Instead, the focus should be on reducing the producer function. Adizes writes, "A healthy adolescence is when the growth in administrative effort (A) is at the expense of producing results (P). Management consciously decides to invest time necessary for entrenching—getting organized."[100] In other words, the focus must be on quality instead of quantity in order to transition well.

The third principal challenge in moving from go-go to adolescence is goal

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[97] Adizes, *Managing Corporate Lifecycles*, 80.

[98] Adizes, *Managing Corporate Lifecycles*, 81.

[99] Adizes, *Managing Corporate Lifecycles*, 91.

[100] Ichak Adizes, "Organizational Passages—Diagnosing and Treating Lifecycle Problems of Organizations," *Organizational Dynamics* 8, no. 1 (Summer 1979): 6.

displacement. The confluence of the three aforementioned factors—delegation of authority, change to professional management, and goal displacement—can make this stage in the organizational lifecycle particularly volatile for a classical Christian school. Between the go-go stage and prime is a rite of passage known as Adolescence where the school must lessen its focus on expanding into new programs and increasing student enrollment and concentrate on improving the structure of roles and responsibilities as well as improved execution of particular processes. Prime is the right balance between form and function, between flexibility and control. Go-Go is about flexibility and adolescence is about control; therefore, without slowing down and increasing internal discipline, the school will remain in perpetual adolescence or enter a pathological set of problems leading to divorce.[101]

Therefore, the key to navigating the passage from go-go to prime and surviving the adolescent years is to institutionalize the entrepreneurial function while administrative management grows. Adizes recommends a key to treating organizations in adolescence: "Management should spend time defining an organization chart. It should determine a corporate mission."[102] Similar to parenting an adolescent, more rules and structure may not necessarily help the organization reach prime, especially if the early years were marked by permissiveness and a lack of any formal restrictions. Adizes writes, "Extra rules and controls are necessary only for those who lack a system of values to support them."[103] In other words, a high sense of integrative management guides an organization to fall back

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[101] Adizes, *Managing Corporate Lifecycles*, 88.

[102] Adizes, *Managing Corporate Lifecycles*, 356. To institutionalize E, the organization must depersonalize and move toward principles, vision, and values. This means that additional hires need to be made so that the founder is not monopolizing the entrepreneurial function in the areas of technology, finance, marketing, and human resources. The first step for a school treating adolescence might be to establish well-defined units like Admissions, Advancement, Finance, and Academics and appoint a director for the area that the founder finds the least interesting.

[103] Adizes, *Managing Corporate Lifecycles*, 357.

upon identity, affinity, and rituals as opposed to rigidly needing the training wheels of rules and procedures.

The characteristic struggle that the case studies will look for in adolescence is the struggle between efficient administrative management and effective entrepreneurial management. These two conflicting tendencies can manifest themselves in serious relational strife even in classical Christian schools. Adizes describes it well: "For an entrepreneur, every problem is an opportunity. But, for an administrator, every opportunity is a problem."[104] These are not complementary perspectives when one is held by the head of school and the other is held by the board. What tends to happen is that that entrepreneurial head of school who is best positioned to understand the market comes toe to toe with the board and is either forced to resign or removed. Adizes calls this pathological problem a divorce. This researcher has also seen the opposite happen where the entire board resigns. If no resignations or removals take place and the school leadership does not reconcile the entrepreneurial and administrative tension, then the school will enter premature aging and not reach prime.

Prime

The deeper causes of prime in classical Christian schools are summarized by the word "balance" or "equilibrium." Schools in Prime have strong vision, values, and culture, as well as excellent operational execution and developed internal systems.[105] With vision and values, the school is walking the talk and the graduates actually exemplify the portrait of the graduate and the employees actually live out the core values. The what, the why, and the how are all in sync.[106] The culture and the business practices are both operating optimally. This is especially important in nonprofits where a private

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[104] Adizes, *Managing Corporate Lifecycles*, 211.

[105] Adizes, *Managing Corporate Lifecycles*, 96.

[106] Adizes, *The Pursuit of Prime*, 127.

school will tend to excel in either vision and culture *or* business practices and systems, but rarely both.

Prime is not simply go-go plus a building. Some schools may be gifted a building by a donor, but they are still in go-go. They did not have to do the capacity-building work to get to prime. The main difference between go-go and prime is that "Go-Go's can tell you how and why they made money. Primes can tell you how and why they made money and why they are going to make money."[107] Although it is slightly different for classical Christian schools in prime, the focus is on ongoing mission-centered success rather than being content with past wins. An organization in prime must have a youthful hunger for ongoing fulfillment of the mission with a mature demonstration of competence in the market.

The hardest part of prime is staying in prime. Schools begin to age and fall out of prime when the drive to continue to improve and change begins to reduce.[108] The great irony is that those in the leadership of prime classical Christian schools are often in the middle or later stages of their careers, which may correspond to decreased levels of energy. The desire to retire might be stronger than the desire to see the institution continue in Prime. Adizes writes, "At a certain age, chronologically different for different individuals, people wish to enjoy rather than add to their accomplishments."[109]

Schools in prime are organizationally fertile. Adizes writes, "Like a mature tree, fruits of a company in prime contain the seeds of new saplings."[110] Although Adizes likens these organizations to mature trees, the ACCS likens them to cathedrals. The ACCS Cathedral School Handbook says,

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[107] Adizes, *Managing Corporate Lifecycles*, 98.

[108] Adizes, *Managing Corporate Lifecycles*, 99.

[109] Adizes, "Organizational Passages," 11.

[110] Adizes, *The Pursuit of Prime*, 25.

> Just as the Cathedral in the ancient church served as a center for learning and coordination and as the Medieval cathedrals inspired vision that directed the hearts and minds of believers throughout Christendom, ACCS wants to partner with these mature schools so that the can become a hub of inspiration, instructions, and so that our shared vision can grow and inspire our movement.[111]

Schools in prime are at peak performance and inspire the broader movement of classical Christian schools. A school in prime has a facility where it can host visitors, a faculty that is worthy of imitation, and training resources that could be scaled into other schools.

Adizes believes that organizational therapy should focus on the system, not the individual. He writes, "The general culture of a company is never the problem of a single individual: It's a problem of the system."[112] For a school in prime, this means that all the conditions are right for ongoing growth toward the mission. To liken this to agriculture, the soil, the sunlight, and the moisture are all in right proportion. In infancy, go-go, and adolescence, the proportions between function and form are not quite right and performance does not reach full potential. In the early stages of growth, the organization is built functionally around the needs of individuals and form suffers. If the organization successfully manages adolescence, then the administrative function will have adequately developed the internal form and structure to become efficient. Once the organization is in prime, it is both efficient and effective in both the short term and the long term. Prime is not a point in time but a process by which decisions are made and implemented within the overall system. The Adizes methodology is aimed at creating an atmosphere of mutual respect and trust, not managing individual behavior.[113]

The literature review has shown that a gap in the Adizes literature and thus reveals a need for applying his model to the classical Christian schooling movement. Research has demonstrated the need for improving the leadership of ACCS schools.

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[111] The Association of Classical Christian Schools, *ACCS Cathedral School Handbook* (Moscow, ID: ACCS, 2020), 1.

[112] Adizes, *Managing Corporate Lifecycles*, 248.

[113] Adizes, *Managing Corporate Lifecycles*, 252.

Although school leadership research has been done in the ACSI, it has not yet been completed in the ACCS. The Good Soils Report confirms the legitimacy of the classical Christian methodology in the ACCS through the outcomes of alumni. The Adizes methodology could be an important part of improving the quality of the institutions that enable these outcomes. Moreover, it has been shown that the theological foundations of prime correspond with the biblical idea of fruitfulness based upon interacting with scholarly commentary on specific verses from Romans and 1 Corinthians.

CHAPTER 3

RESEARCH DESIGN

The purpose of this qualitative multiple case study research is to understand leadership throughout the growth process of classical Christian institutions affiliated with the ACCS. Using a multiple case-study methodology, this research analyzes school leadership and school growth by examining a sample of schools positioned at different stages of the organizational lifecycle. Because different leadership styles are required at different stages (e.g., infancy compared to prime), a school perceived to be at each of the growth stages was included for within-case and cross-case analysis with the aim of describing leadership throughout the school growth process. Due to the abundance of literature on the organizational lifecycle, this research utilizes the terminology and methodology of organizational scholar Ichak Adizes in order to understand the phenomenon of school leadership and growth.

The methodology of this research is informed by the research design of three other scholar-practitioners who have used multiple case study methodologies. Melody Smith studied classical Christian schools in the ACCS using a multiple case study methodology. The research design decisions from Smith's dissertation were instrumental in choosing to use purposeful sampling in the participant selection and also in the language for informed consent participant agreement to conduct qualitative interviews.[1] Although Smith uses private interviews instead of focus groups, her language around qualitative data collection was an illuminating source for the data collection procedures.

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[1] Melody Kay Smith, "Classical Christian Education and Students' Christian Formation" (EdD diss., Liberty University, 2020).

As mentioned in chapter 1, the overall three phases of design were influenced by McGaughey and McGready.[2]

Delimitations

The intentional measurement boundaries chosen, or delimitations, of this multiple case study logically limit the overall generalizability of the overall research findings.[3] There are three primary delimitations of this study.

First, only six ACCS-affiliated schools are included in the multiple case study, which means that a number of regions of the country and other school types are not represented in the sample. Although the schools chosen represent different stages of the organizational lifecycle, the study does not include different types of classical Christian schools at each of those stages but only a sample of those affiliated with the ACCS. For example, the study does not include any classical Christian colleges, so the overall generalizability is intentionally limited in that regard. After reading Daniel Peterson's dissertation comparing ACCS schools to another private K-12 Christian model, it became clear that a meaningful comparison must prioritize depth over breadth and thus, colleges were excluded.[4] Peterson's work carefully compared the levels of faith integration between two educational models within K-12 schooling.

Second, this research is interested in the relationship between leadership and school growth throughout the lifecycle, which means that schools that appeared to be on the aging section of the lifecycle curve were excluded. In other words, the cases all

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[2] Kevin Byron McGaughey, "Change Management for Christian Leaders in the Marketplace: A Multiple Case Study" (PhD diss., The Southern Baptist Theological Seminary, 2016), 186; Robert Collison McCready, "Relay Succession in the Senior Pastorate: A Multiple Case Study Method" (PhD diss., The Southern Baptist Theological Seminary, 2011), 167.

[3] John W. Creswell and Cheryl N. Poth, *Qualitative Inquiry and Research Design: Choosing among Five Approaches*, 4th ed. (New York: Sage, 2016), 71.

[4] Daniel Carl Peterson, "A Comparative Analysis of the Integration of Faith and Learning between ACSI and ACCS Accredited Schools" (PhD diss., The Southern Baptist Theological Seminary, 2012).

demonstrate greater characteristics of growing as opposed to aging or dying.[5] Therefore, the findings of this research are limited in their applications to schools in the aging portion of the organizational lifecycle.[6]

Third, although the multiple case study methodology is useful for appreciating the variety of contextual factors that may cause school growth, this study does not include a formal quantitative element that could expand the reach of its generalizability.[7] The study is a qualitative descriptive multiple case study so there is no intent to generate a grounded theory that is explanatory over some causal relationship. Instead, the research seeks to describe what is happening in a handful of schools rather than what happens at all schools in all places.

Research Questions Synopsis

The following questions directed the data collection and analysis phases of the case study research:

1. *Defining Prime*: How does one know when a classical Christian institution is performing at its Prime, and does Prime fit with the philosophy and theology of the classical Christian educational mission?

2. *Early Leadership Causes of School Growth and Aging*: What are the characteristics of schools in Courtship, Infancy, and Go-Go, and what leadership behaviors contribute to growth and aging in these early stages?

3. *Later Leadership Causes of School Growth and Aging*: What are the characteristics of schools in Adolescence and Prime, and what leadership behaviors contribute to growth and aging in these early stages?

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[5] Ichak Adizes, "Corporate Lifecycles," *Executive Excellence* 15, no. 2 (February 1998): 6.

[6] Studying aging schools would admittedly be difficult, because they likely would not see the value of participating in leadership focused on growth because aging organizations value control. Unless there was a crisis, the school's leadership likely would not see external intervention as necessary and even as a potential threat to managerial control. The highly administrative culture of aging organizations places more value on legal, finance, and human resources than research, development, admissions, and fundraising.

[7] Pamela Baxter and Susan Jack, "Qualitative Case Study Methodology: Study Design and Implementation for Novice Researchers," *The Qualitative Report* 13, no. 4 (2008): 18.

Adizes asserts that the way organizations behave at various stages in the organizational lifecycle is tied back to certain styles of leadership.[8] Research questions 2 and 3 are interested in understanding both the diagnostic and the therapeutic, or transformational, aspects of school growth. Diagnostically, the research seeks to accurately identify where the school is at in the organizational lifecycle based upon certain characteristics observed during the case study. Therapeutically, or transformationally, the research is interested in understanding which leadership behaviors have contributed to moving the organization from one level of maturity to a more advanced level.[9] By using Adizes's four stages of growth (Infancy, Go-Go, Adolescence, and Prime) and four leadership styles (Producer, Administrator, Entrepreneur, and Integrator), the research qualitatively describes the leadership causes of school growth throughout the organizational lifecycle.[10]

Research Design Rationale Overview

This study explores the phenomenon of the leadership contributions to institutional growth throughout the lifecycle in classical Christian institutions by employing a qualitative multiple case study methodology. The rationale for choosing the multiple case study is fourfold. First, the qualitative nature of this methodology asks open-ended questions that begin with the words "how" and "why."[11] Second, the case

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[8] Ichak Adizes, *The Ideal Executive* (Santa Barbara, CA: Adizes Institute, 2004), 19.

[9] Due to the short window of time for this research, the only data collected from the schools was via the pre-visit questionnaire, the focus group, and examination of any other pertinent archival documents. The traditional Adizes methodology partners with organizations for at least one year; therefore, further research could utilize a longitudinal methodology to perform more comprehensive within-case analysis. The strength of this research design is the cross-case analysis, not the within-case analysis due to the limitations of time.

[10] Ichak Adizes, *The Pursuit of Prime: Maximize Your Company's Success with the Adizes Program* (Santa Barbara, CA: Adizes Institute, 2005).

[11] Baxter and Jack, "Qualitative Case Study Methodology," 18.

study methodology collects data from a variety of internal sources like financial statements, meeting agendas, focus groups, and strategic planning documents while simultaneously accounting for relevant contextual factors like location, size of market, and competition.[12] Third, the multiple case study methodology analyzes all of the collected data in holistic and iterative fashion.[13] Fourth, the results of individual case studies can be put into conversation with one another to describe a taxonomy of school growth that could potentially have wider application.

This research employed a multiple case study methodology in order to understand the process of the leadership contributions to school growth over time. The primary data collection methodology was in-person focus groups with six different schools across the United States along with questionnaires that were filled out before the visit. Three schools were chosen from the ACCS West Region, two schools from the ACCS Midwest Region, and one school was from the Southeast Region; the ACCS Regional Map is displayed below in figure 3.[14] To answer the research questions effectively, three of the schools were less than 20 years old and PK-8 or less. The other three schools were 20+ years old and served students through the end of 12th grade.[15]

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[12] Creswell and Poth, *Qualitative Inquiry and Research Design*, 100.

[13] Baxter and Jack, "Qualitative Case Study Methodology," 18.

[14] Classical Christian Schools, "Find an ACCS Accredited School," accessed December 3, 2019, https://classicalchristian.org/moving/.

[15] The gap that incited this research was the number of ACCS schools that were K-8 yet had not been able to find a way to add grades 9-12. As shown in chaps. 4 and 5 of this thesis, this research makes a step of progress for these schools by defining the key issues when in four areas: Classical Christian Teaching and Learning (P), Operations and Finances (A), Fundraising and Facilities (E), and Marketing and Admissions (I). All four of these organizational functions must be present for the school to sustainably add grades 9-12.

Figure 3. ACCS regional map

To answer the research questions regarding the characteristics of each lifecycle stage as well as the leadership factors that contribute to school growth, the researcher visited each school to conduct a focus group with a cross-section of people from the school. At each of the six meetings that occurred in the Spring of 2022, there was a combination of parents, board members, administrators, and teachers. The main data points collected during the focus group included: (1) each individual's PAEI code, (2) a list of participant-generated school problems that were coded using the school problem grid shown in table 5, and (3) the participant's diagnosis of the school's stage in the lifecycle. All of these pieces of data were written by the participants on index cards and then transcribed into an aggregate spreadsheet by the researcher. To analyze the data from the exercise where the participants generated school problems, the research coded the problems using the school problem grid (see table 5).

Table 5. The school problem grid for coding organizational problems

	Culture of People Column 1(paeI)	Structure of People Column 2 (pAEi)	Process for People Column 3 (pAEi)	Symptoms of People Column 4 (PAei)
Row 1	Faculty Behaviors	Board Governance	Strategic Planning	Facilities Quality
Row 2	Student Behaviors	Committees & Advisory	Financial Planning	Financial Ability
Row 3	Parent Behaviors	Executive Leadership	Campus Planning	Donor Engagement
Row 4	Admin Behaviors	Academic Leadership	Internal Marketing	Enrollment Management
Row 5	Board Behaviors	Operations Leadership	Training & Development	Student Life
Row 6	Micro Behaviors	Volunteerism	Financial Stability	Faculty Life
Row 7	Macro Behaviors	Student Support	Communications	Operations

During the six focus groups, participants wrote problems on cards and then the researcher categorized them using the school problem grid. For example, one school shared, "There is a need for external board members at the school." After the card was submitted by the participant in writing on the index card, the researcher read the card aloud to the group and then silently coded that particular card as a 2.1; the first number is the column (2 in this relating to structure) and the second number is the row (1 in this case related to board governance). This process and the School Problem Grid come directly from step 1 of the Adizes methodology where the researcher conducts "an organizational diagnosis to pinpoint the problems facing the company and the root causes of those problems. . . . The diagnosis involves an analysis of both the company's structure and the processes it uses to identify and accomplish its intended mission."[16] Adizes calls these

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[16] Adizes, *The Pursuit of Prime*, 215.

problems the potential improvement points; he believes that pulling together these complementary teams from across the organizational boundaries for the diagnosis stage fosters organizational potency to solve the institutional problems affecting the whole.[17]

The School Problem Grid was constructed using the Adizes organizational diagnostic categories as well as the ACCS Accreditation Standards and the Independent School Management (ISM) Stability Markers. According to ISM, "the ISM Stability Markers' fourth iteration comprised 18 variables, each of which, according to ISM's internal reviews, correlated with private-independent schools' ability to sustain excellence over time."[18] One example of the ISM Stability Marker's influence on the School Problem Grid is 4.1, "Facilities Quality," which uses the exact language in Stability Marker H. One example of the ACCS Accreditation Standards impact on the School Problem Grid is 3.5, "Training and Development," which is "Faculty and Instructional Resources."[19] The names of the columns on the School Problem Grid, namely "structure" and "process," were driven by the steps to conduct an organizational diagnosis in *The Pursuit of Prime*.[20]

This data collection protocol constructed using the categories from the literature review that examined the Adizes methodology with the aim of providing meaningful qualitative descriptive data to answer the research questions. The driving aim was to identify the relationship between leadership and lifecycle as described in the

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[17] Adizes, *The Pursuit of Prime*, 212-13. The Adizes logic is that if different people can agree on the diagnosis of the problem, then they will implement solutions more effectively once the problems are diagnosed and prioritized. These are the people whose cooperation is critical for bringing about organizational change.

[18] Independent School Management, "The ISM Stability Markers: The Fifth Iteration," accessed December 1, 2021, https://www.fcis.org/uploaded/WORKSHOPS/2018_Convention/Stability-_Markers-The-Fifth-Iteration.pdf.

[19] Association of Classical Christian Schools, *ACCS Accreditation Handbook*, 29.

[20] Adizes, *The Pursuit of Prime*, 215.

Adizes literature.[21] This researcher sent the risk assessment and instrumentation requirements to the Research Ethics Committee of the Southern Baptist Theological Seminary and received approval to work with human participants during the focus group portion.

Population

Purposefully selected cases that represent the early and later stages of growth were incredibly important for the research questions to be answered and the data to be descriptive.[22] Therefore, the rubric in table 6 was used to purposefully select the six schools in this study. Within the multiple case studies, there is a diversity of locations, ages, grades served, administrative structures, and board governance models. Although the lifecycle stages are predicted in this table, lifecycle stage is far more sophisticated than the columns listed in this table; a school's lifecycle stage is determined by its problems which are due to the presence or absence of the PAEI managerial vitamins.

Table 6. Case study participant selection criteria

	Faculty Structure & Grades Served	Admin Structure	Facilities	Board Governance
School 1 (Infancy, Paei)	Less than K-8	Part-time admin	Rented	Operational
School 2 (Go-Go, PaEi)	At least one shared grade	Single Admin	Rented	Operational
School 3 (Adolescence, pAEi)	No shared grades but less than K-12	Single or multiple admin	Rented or permanent	Strategic
School 4 (Adolescence, pAEi)	K-12, one or two sections	At least 2 admin (Principal & Head of School)	Rented or permanent	Operational or Strategic
School 5 (Prime, PAEi)	No combined grades and multiple sections per grade, at least 5 graduating classes	Head, Principal, and at least one more admin	Permanent or rented facilities	Strategic
School 6	No combined	Head,	Permanent	Strategic

[21] Adizes, "Corporate Lifecycles," 6.

[22] Creswell and Poth, *Qualitative Inquiry and Research Design*, 19.

(Prime, PAEi)	grades, single section, at least 5 classes graduated	Principal, and at least one more admin	facilities	

In the far-left column in parentheses, the school number has both the predicted Adizes lifecycle stage (e.g., Adolescence) and the corresponding Adizes management code (e.g., pAEi).[23] Using the actual Adizes language in the case selection as faithfully as possible is important for the results to be sustainable. The lifecycle predictions were merely projections based upon administrative structure, grades served, age of the school, governance model, and the overall enrollment of the school. Table 6 was useful to the researcher in purposefully recruiting schools that would saturate the research questions with pertinent data. The degree to which the lifecycle projections conform to the results of the school visit focus group and data analysis is discussed in chapters 4 and 5 of this research.

The school visit and subsequent data analysis analyzed how the participant schools reached their current lifecycle stage. The within-case and cross-case analysis provides a measure of insight into answering the transition from courtship to infancy by understanding their history; this research included an infancy school in order to better document the organizational passages in the early years of a classical Christian school. The pre-visit questionnaire also invited participant schools to submit documents that could be helpful in diagnosing where schools are in the lifecycle and the leadership factors that contributed. This within-case research is done for each of the cases to demonstrate the school's movement from one stage to another over time.[24]

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[23] The Adizes methodology diagnoses a school's lifecycle stage by working with the school's management in a focus group fashion to describe all their major problems. Thus, the school's stage is diagnosed internally based upon the scope of the problems they are experiencing. In the same way that the toddler years are marked with problems of obedience or cleanliness, schools in infancy are plagued by establishing a market, undefined roles, and a lack of financial support. Categorizing these problems as normal, abnormal, or pathological, and identifying which PAEI leadership deficiencies are the causes of the manifestations of the problem, is what the focus groups do with the cases.

[24] Creswell and Poth, *Qualitative Inquiry and Research Design*, 17.

The case study participant selection criteria (see table 6) were created based upon the most common problems associated with key passages throughout the organizational lifecycle after interviews with veteran heads of school. First, the organizational passage from combined sections (e.g., combined grades 5-6) to one section per grade stretches school resources. One of the schools in table 6 has at least one combined grade. Second, the process of adding grades 9-12 and graduating students can be tremendously difficult. One school in table 6 is adding grades or has completed the process. The fifth and sixth schools were both projected to be in Prime yet have a different facilities scenario and total enrollment. The rationale for this is to show that Prime is not based on total enrollment. A school in a rural community is almost always smaller than a school in an urban or suburban context. The size or location of a school has nothing to do with Prime, but rather Prime is an expression of balance, equilibrium, maturity, and fruitfulness. As mentioned in chapter 1, each of these schools is either an ACCS member or accredited school. The desired outcomes of table 6 were achieved because a great diversity of ages, stages, facilities scenarios, governance structures, and admin teams were represented in the sample.

Since the particular focus of this research is to qualitatively understand the sequence of stages that classical Christian schools pass through over time, purposeful sampling was used. The goal of this sampling methodology is to choose participants who will saturate the researcher with data aligned to the overall research purpose, which is to understand leadership throughout the growth process of classical Christian institutions affiliated with the ACCS. This study chose schools that range along the stages of the school lifecycle to maximize the opportunity to learn about the growth process when comparing across the multiple cases. Moreover, within-case research is done to demonstrate the schools' movement from one stage to another over time.[25] In order to choose schools at various stages of maturity, this researcher considered age of school,

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[25] Creswell and Poth, *Qualitative Inquiry and Research Design*, 62.

total enrollment, leased or permanent facilities, board structure, number of administrators, and tenure of head of school.

Further Research

This study is limited in eight areas that other researchers could take up in the future.

1. It is not a mixed methods or quantitative study.

2. This research does not include classical charter schools or classical Christian schools (k-12) outside of the ACCS.

3. The multiple case study methodology only samples a small number of schools. A different methodology could have been used to study this phenomenon at a larger scale, which could increase the generalizability of these findings.

4. The exclusion of classical Christian schools that accept government funding limits the overall generalizability of this study as well.

5. A large number of private schooling movements, Christian and secular, are excluded from this research, yet the Adizes program likely has lifecycle and leadership applications to those movements as well. Further research could seek to apply the Adizes lifecycle research to those schooling movements.

6. This research seeks to apply the lifecycle research of Ichak Adizes, but excludes the lifecycle theories of others who could make valid contributions to the conversation about how classical Christian organizations grow over time. Others could use different lifecycle frameworks to do the same sort of research.

7. This research does not study organizations in the aging stages of the lifecycle, which could be included in future research.

8. The Adizes Program has 11 steps yet this study, due to the duration of the study, is able to understand the first two.[26]

For further Adizes research, it is important to read all his major publications but also to understand the work of the institute and the associates. The Adizes Institute trains associates around the globe and even has a university so the books are the entry point into understanding his methodology. The decision to exclusively use the work of Adizes was made based upon the wide-reaching scope of his work, the simplicity of his growth stages (Courtship, Infancy, Adolescence, and Prime), and the clarity of his management styles

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[26] Ichak Adizes, *Mastering Change: Introduction to Organizational Therapy* (Santa Barbara, CA: Adizes Institute, 2016).

(Producer, Administrator, Entrepreneur, and Integrator). The internal consistency and comprehensive clarity of his works make his framework manageable to apply in a case study methodology. The case study methodology was utilized to describe a phenomenon and Adizes provides a terminology that is useful in two primary ways. First, his descriptions of Courtship, Infancy, Go-Go, Adolescence, and Prime enable this researcher to match an entire school to a stage based upon the problems the school is experiencing. The diagnostic language proved invaluable for this case study research. Second, Adizes's unique insight is that four management roles must be present for an organization to reach Prime and that each management type (Producer, Administrator, Entrepreneur, and Integrator) has a time in the lifecycle where it is dominant.[27] Searching for the dominant management role was instrumental in diagnosing a school's position in the lifecycle and prescribing next steps.

This researcher initially considered doing a deep archival dive into one single mature school's institutional history, but that methodology fell short for three reasons. First, by only studying one thriving school, there is a great risk of choosing a school that is benefiting merely from external factors like geography or market competition or a single generous donor. Thus, this research uses a multiple case study methodology to appreciate the contextual qualitative factors that impact school growth. Second, the majority of classical Christian schools are still less than thirty years old, which means that most have not developed organized protocols for data management and a multiple case study methodology would better examine the phenomenon under investigation, especially if archival data was not readily available. Third, only studying one school would not necessarily cover the whole range of the lifecycle from Courtship to Prime and would not highlight each management style. Although the multiple case methodology does

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[27] Adizes, *The Ideal Executive*, 36.

not allow me to inquire as deeply into each case, the ability to do cross-case analysis is essential for understanding the overall growth process throughout the lifecycle.[28]

Research Instrumentation and Procedures

In order to provide the opportunity for this study to be replicated by another researcher, the research design overview describes the steps to complete the research on the leadership causes of school growth. The three phases of this research design overview are: (1) define and design, (2) prepare, collect and analyze data, and (3) present findings relevant to the research questions on the leadership causes of school growth. Multiple steps were taken within each phase.

As shown in figure 1 in chapter 1, there are three phrases to this multiple case study methodology: Define & Design in phase 1, Prepare, Collect, & Analyze Data in phase 2, and Present Findings in phase 3. In phase 1, this researcher examined the literature and found a gap in the area of leadership causes of school growth in classical Christian schools. Moreover, there were no peer reviewed Adizes articles or dissertations on leadership throughout the lifecycle in the context of a school.[29] With purposeful sampling, a participant profile was drafted, and schools were chosen based on the possibility of providing meaningful data to answer the research questions. Once the schools were identified, a two-step engagement protocol was established: pre-visit questionnaire, and onsite focus groups.

In phase 2, this researcher prepared, collected, and analyzed the data from the

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[28] There would be great risk in only using one sample because the researcher could unintentionally choose a school that is not as far along in the lifecycle as it appeared from a distance. As will be shown in chaps. 4 and 5, a school's maturity in the lifecycle is not determined by size, age, location or budget, but on the scope of the problems that they experience. Moreover, the researcher facilitates the focus groups that lead to the internal diagnosis. This cannot be pronounced from a distance.

[29] Duane E. Brown, "Life beyond the Launch: Case Studies in Post-Launch Vitality, Adaptation, and Identity Formation of New Wesleyan Congregations" (PhD diss., Asbury Theological Seminary, 2009). Brown draws from Adizes to a degree but is interested in the organization as a whole instead of the relationship between the organizational vitality and its correlation with leadership. Moreover, the dissertation is written on churches instead of schools, which have some idiosyncrasies.

pre-visit questionnaires and the focus groups. The pre-visit questionnaires were sent in advance of the visit with an informed consent participation agreement. During the visit where the focus groups were conducted, all participants completed an informed consent participant agreement to ensure ethical research with human participants. With the iterative nature of the research design, the researcher was able to analyze the questionnaire, document observations, and focus group data after it is collected in order to diagnose the school's lifecycle stage and identify the PAEI leadership contributions to school growth. The end of phase 2 was creating a case narrative on each of the participant schools. These reports in chapter 4 provide an overview of the school's data from each phase of the process along with a description of the leadership styles in that stage of the lifecycle. Each of the reports is organized under four category headings: (1) teaching and learning, (2) operations and finance, (3) fundraising and facilities, and (4) marketing and admissions.

Before describing phase 3 of data collection, it is essential to note that the focus groups are the central feature of this study. Why was it necessary for this researcher to log 1000s of miles traveling to schools when a set of electronic surveys could have been sent? The focus groups were comprised of a small group of people who do not tend to come together in one meeting: teachers, parents, administrators, and board members. The participants did three crucial activities together: articulated their individual PAEI codes, described the school's potential improvement points in an environment of mutual respect and trust, and self-diagnosed the school's overall lifecycle stage using the Adizes lifecycle descriptions. According to Adizes in *The Ideal Executive*, "The problem is we usually have one executive or manager chasing ten problems rather than 10 managers chasing one problem."[30] The magic that happens when individuals are brought together is that they see that nobody can solve the school's major problems can be solved by one individual or by a single department of the school. The school's teaching and learning is impacted by

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[30] Adizes, *The Ideal Executive*, 29.

marketing and admissions and the school's fundraising and facilities is directly related to its operations and finances.

The choice of the focus group as the needed data collection instrument to answer the research questions was informed by best practices on focus groups as well as a key insight from the Adizes methodology. Julius Sim and Jackie Waterfield provide consent and participation agreement strategies needed to construct a meaningful and ethical focus group data collection instrument.[31] A focus group "a type of group discussion about a topic under the guidance of a trained group moderator."[32] Because of the spontaneous and open-ended nature of a qualitative focus group, the moderator aligns the group with the purpose of the study and the need for mutual respect and trust. Adizes has tried several methodologies for lifecycle diagnosis such as individual interviews, analysis of performance indicators, and various questionnaires and surveys, but has found the focus group data collection methodology to be the most effective. This collaborative process allows the group to auto-diagnose the company's stage in the lifecyle.[33] The focus group allows leaders to arrive at a common understanding of the weaknesses and problems impacting the organization and what it must do to overcome them. Surveys cannot align people because they increase autonomy and confidentiality, which are impediments to shared organizational clarity.

For Adizes, the focus group methodology exposes the broader picture to all the parties needed for cooperation. The focus group also creates an environment where participants are empowered to make needed changes. The focus groups possess four important features: (1) assemble the management team and some additional key players from other levels of the organization in an interactive session for one day; (2) facilitate a

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[31] Julius Sim and Jackie Waterfield, "Focus Group Methodology: Some Ethical Challenges," *Quality & Quantity* 53, no. 6 (November 1, 2019): 3003-22.

[32] Sim and Waterfield, "Focus Group Methodology," 8.

[33] Adizes, *Mastering Change*, 271.

constructive environment where problems can be discussed and identified without it becoming a finger pointing session; (3) use the Adizes PAIE code and lifecycle stages to create a new understanding of what problems are, what causes them, how they are interrelated, and how they relate to the organization's stage in the organizational lifecycle; and (4) leverage the school leaders' organizational knowledge and experience in real-time learning environment.

In phase 3, the presentation of the findings shows the extent to which the Adizes methodology helped to answer the research questions. Through within-case and cross-case analysis, the aggregate data of the six case study schools revealed a descriptive taxonomy of school growth. Although it is not comprehensively explanatory or a grounded theory, it makes a significant confirmation of the Adizes methodology in a new context. Here is just one example of the potential impact of the descriptive taxonomy. As schools move from courtship to infancy, they can see how important it is to focus on the Producer function: to produce results consistent with the school's overall purpose. Without this knowledge, the entrepreneurial management style that was dominant during Courtship could continue to destructively guide the school's leadership. Once schools transition from Courtship to Infancy, the management must prioritize P over E. Similar transitions will need to occur at other important passageways throughout the organizational lifecycle.

In future Adizes research on step 1 of the Adizes methodology, it is essential to remember that all of the key players must be part of the focus group. Adizes writes that the focus group must include all of the people whose cooperation is needed in order to solve a problem, which is called Coalesced Authority Power and Influence (CAPI).[34] During the focus group, participants will list all of the problems that the organization faces. The desired impact for each participant is to shift from thinking that the issue is the organization's problem to adopting the mindset of, "This is our problem." CAPI is the

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[34] Adizes, *Managing Corporate Lifecycles*, 211.

reason Adizes does not use private interviews or institutional performance metrics. Although surveys are ideal for anonymity, they can stifle the cooperative spirit needed to manage difficult change.[35] According to Adizes, the biggest problem any organization faces is their inability to solve their own problems. The focus group empowers them to overcome that. The challenge is getting the individuals whose cooperation is needed to find the solution and implement it.

For qualitative data analysis, Mulatu's multi-step procedure in "Transitioning from a theological college to a Christian University in East African context: A multi-case study" was appropriated with slight modifications.[36] The five steps of Mulatu's procedure are outlined in the next sections.

Step 1: Organize and Prepare the Data for Analysis

The qualitative data comes from two sources: the pre-visit questionnaires, the focus group data from the school visit, and observations from any institutional documents submitted. For each case, the researcher is searching for two elements: PAEI management characteristics and Lifecycle stage-specific problems. In step 1, the researcher seeks to get all the relevant data out on the table.

Step 2: Read through the Data

By becoming familiar with the three sources of qualitative data from the six cases, the researcher begins to gain an overall sense of the data from the participant schools.

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[35] John P. Kotter, *Leading Change* (Boston: Harvard Business Press, 2012), 8. Kotter emphasizes the need for a guiding coalition during times of change. This is the same idea Adizes is going after with the synergetic focus group.

[36] Semeon Mulatu, "Transitioning from a Theological College to a Christian University in East African Context: A Multi-Case Study (PhD diss., The Southern Baptist Theological Seminary, 2012), 63. http://ezproxy.sbts.edu/login?url=https://www.proquest.com/dissertations-theses/transitioning-theological-college-christian/docview/1019281945/se-2?accountid=14061.

Step 3: Begin Detailed Analysis
with the Coding Process

Like Mulatu, this researcher imitated Creswell's[37] qualitative data analysis procedure categorizing the textual data from participants into Adizes PAEI and lifecyle categories. The researcher enters the coded data into an aggregate spreadsheet based upon the codes from the School Problem Grid.

Step 4: Within-Case and Cross-Case Analysis

Once the three sources of data are coded, the participants' reports of the organization's movement across stages over time need to be taken into account through within-case analysis. During the focus group, participants self-diagnose their school's stage based upon the problems the participants recorded. During analysis, the researcher looks to see how leadership navigated the passages from one stage to another based upon the participants' descriptions of the past. Additionally, the researcher compares how leadership navigated organizational passages across cases to see the degree to which the Adizes PAEI and lifecycle stages accurately describe the school's journey.

Step 5: Interpret the Meaning
of the Data

In qualitative focus group research, it is not possible to remove the researcher's own experiences and biases. This researcher's experiences as a headmaster in a classical Christian school consultant to schools impacted interpretation. To limit bias, this researcher sought to use the Adizes definitions of problems, lifecycle stages, the PAEI code, the Adizes literature, and the School Problem Grid to be the aggregate evaluative standard for answering the research questions. Moreover, this researcher sought to take seriously the way participants made meaning of their own experiences at the case study schools.

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[37] Creswell and Poth, *Qualitative Inquiry and Research Design*, 186.

CHAPTER 4

ANALYSIS OF FINDINGS

The aim of this study was to add to the body of knowledge that may aid in guiding leaders of classical Christian schools. This research intended to understand and document the growth process of a classical Christian schools at each stage of the school lifecycle. The research findings in this chapter were analyzed using the Adizes lifecycle and PAEI management categories presented in the previous chapters of this research. The qualitative descriptive case study methodology helped to discover leadership trends of six different classical Christian schools at sequential stages of the school lifecycle. This chapter of the research presents the findings from the six different schools and describes the relevant strengths and weaknesses of this design methodology.

Each school's case report is organized under four category headings that emerged iteratively during the data collection phase. The four category headings are: (1) classical Christian teaching and learning (P), (2) finance and operations (A), (3) fundraising and facilities (E), and (4) marketing and admissions (I). Several organizing category headings were attempted before this configuration fell into place with the help of the president of the Adizes Institute, Shoham Adizes. In an email correspondence, Dr. Adizes's son, Shoham Adizes, shared,

> Every profit center must have access to all four subsystems at birth to be successful. The problem is that each subsystem grows at different speeds through the lifecycle. The gaps in development show up as operational or symptomatic problems. They are symptomatic of the fact that the organization did not plan on how to develop them together.[1]

This quote was helpful in realizing that PAEI is not just for diagnosing an individual's

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[1] Shoham Adizes, e-mail to author, June 1, 2022.

management style but also structuring responsibilities right. Adizes writes, "The organization must be structured to attract and nurture those complementary management styles."[2] This means that there is a sufficient PAEI-diverse atmosphere present throughout the various units of the school so that each PAEI individual style can thrive. The school is not overly-bureaucratized by the operational and financial types nor is it glutted on the entrepreneurial spirit that dominates fundraising and facilities.
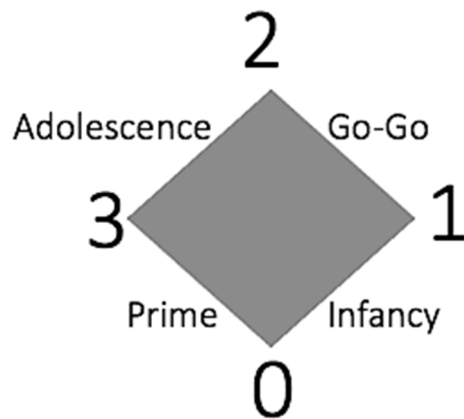
Figure 4. The four corners of a healthy Christian classical education institution

In the middle of figure 4 is a diamond with four corners. The four corners represent the four domains that are the category headings of the six schools' qualitative data in the case narratives. These four stages were helpful in suggesting a leadership taxonomy of growth throughout the lifecycle that is marked by four transitions. The four corners are school-specific domains whereas the four transitions are Adizes-specific language from the PAEI code and the lifecycle stages. Transition 1 focuses on teaching and learning. Transition 2 focuses on marketing and admissions. Transition 3 focuses on finance and operations. Transition 4 focuses on fundraising and facilities. The diamond was chosen to harken to the sport of baseball. Over the years of a school's lifecycle, the

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[2] Ichak Adizes, *The Ideal Executive* (Santa Barbara, CA: Adizes Institute, 2004), 159.

school as a whole is rounding the four corners of the diamond in order to reach Prime. Each journey from one base to another has a specific focus that corresponds to the PAEI code from Adizes. This visual emerged by constructing the case narratives shown in the subsequent sections.

Compilation Protocol

The data of this research was collected in the form of a series of six focus groups guided by the case study protocol. The research methodology included three phases: (1) define and design; (2) prepare, collect, and analyze; and (3) analyze and present conclusions. This section describes the process for each of those phases. This phase of the study began with a review of the relevant Adizes literature in the field of organizational leadership and lifecycles. A framework for diagnosing leadership and lifecycles through PAEI codes and the five growth stages (Courtship through Prime) emerged from an examination of the literature. This was examined using philosophical and theological categories to show that the Adizes methodology requires caution but is still applicable theoretically to the case study schools. The case study protocol guided the data collection process for the six groups.

Based on the literature review and the research questions, four clear categories emerged for organizing the case study data: (1) teaching and learning, (2) marketing and admissions, (3) finance and operations, and (4) fundraising and facilities. The data collected from the focus groups was coded during the visits using the School Problem Grid. The School Problem Grid was created through a synthesis of the ISM Stability Markers and the ACCS Accreditation Standards, as well as the Adizes organizational diagnosis categories.

Prepare, Collect, and Analyze

The second phase of the study was to prepare, collect, and analyze the data. The case study protocol and focus groups were designed to guide the interviewer in

answering the research questions and saturate the categories with data from the schools. The focus group time was comprised of three sections: individual PAEI self-diagnosis, collective potential improvement point generation, and institutional lifecycle auto-diagnosis. During the individual PAEI self-diagnosis, participants were presented with the Adizes content on the four management roles within an organization and then asked to write what they thought their individual PAEI code was by writing it on the back of an index card. During the potential improvement point generation activity, participants followed the process laid out by Adizes in the *Pursuit of Prime* to clarify the major problems preventing the organization from reaching Prime.[3] Individuals wrote the potential improvement points on index cards and the researcher coded them using the School Problem Grid. During the institutional lifecycle diagnosis, individuals were presented with the Adizes institutional lifecycle categories from *Managing Corporate Lifecycles* and then asked to self-diagnose what stage they thought the school was in by writing it on an index card.[4] At the end of the process, the researcher collected all the index cards along with their codes and entered them into an Excel spreadsheet organized by the codes on the School Problem Grid. This process was replicated for all six case study participants.

Analyze and Present Conclusions

The final phase of this study was to analyze the data and present the conclusions of the research. Once each case study was complete, the data was analyzed to determine if meaningful answers were provided to any of the three research questions. The explanations and case study narratives reflect the degree to which the Adizes organizational diagnostic categories are useful to classical Christian schools. Moreover, the results imply a need for

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[3] Adizes, *The Pursuit of Prime*, 74.

[4] Adizes, *Managing Corporate Lifecycles*, 18.

further research on organizational change and behavior in the fledgling classical Christian movement.

Findings

As the data was collected, transcribed, and analyzed, it was grouped into four categories to provide a process of managing the acquired data. In the subsequent section, the narratives of each case study are presented with the data from the focus groups and pre-visit questionnaires. The next section, then, provides analysis, describing the relationship of these studies to the research questions. To protect the identity of the schools, anonymity in reporting results was granted. In addition, the data tables are provided to assist in drawing appropriate conclusions to one's context.

School 1

School 1 is in its first year with eighteen total students in grades K-7 and is located in Illinois. According to one of the founders, "The school was established in August 2021 with a group of eight pioneer families, eighteen students and six faculty. Our conviction for starting a classical Christian school in our area was influenced by the fact that there are limited classical Christian educational offerings that are affordable and accessible to families." The school uses classroom space from a church where some of the founders are members. The founding administrators are also teaching at the school. School 1 is committed to an educational approach that blends the enduring elements of classical learning and the eternal message of Scripture within the context of a supportive community. According to the pre-visit questionnaire, the main problems right now are finding a facility, raising funds, and establishing a classical Christian identity. There are three very capable board members; two of them had three dominant management (PaEI, pAEI) traits that seemed to be confirmed by the group. This was relatively unique to this particular school, yet makes sense given the type of a characteristics required to build a school. One of the board members is not a parent but a local businessman, one has Doctor

of Leadership and has a well-connected family in Christian education, and the other is a successful businessman. They also have ties to a local seminary in Illinois—one of the teachers is from the seminary. Additionally, it is important to note that there is basically no private school competition in School 1's location where there is a general population of 555,285 with a family median income of $92,984.[5] School 1 went from eighteen students in year 1 to fifty-eight kids in year 2.

The four category headings are (1) teaching and learning, (2) finance and operations, (3) fundraising and facilities, and (4) marketing and admissions. These organizational inputs correspond the four external outputs as show in table 7. Each of the school case narratives seeks to provide a general reporting of the outputs followed by a summary of the data from the inputs.

Table 7. The four subsystems

	Inputs	Adizes Management Role	Outputs
1	CC Teaching and Learning	Producer	Total Faculty, Staff, and Admin Grades Served, Teacher Retention
2	Finance and Operations	Administrator	Total Budget, Hard Coverage
3	Fundraising and Facilities	Entrepreneur	SP/SFP, Square footage/acreage, Annual Fund/Capital Campaign
4	Marketing and Admissions	Integrator	Enrollment, Capacity, Retention

Adizes asserts that the school must be born with these subsystems intact, similar to a baby being born with ten fingers and ten toes. If these subsystems, or departments, are entirely absent in the transition from courtship to infancy, then it will be difficult for them to develop later or they will develop unevenly, which will generate problems. Table 7 demonstrates that the Adizes PAEI code is more than just individual orientations, but an

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[5] The demographic numbers in the research were provided by the school leaders in the pre-visit questionnaire.

institutional orientation. A school with a dash in its PAEI code is a school that is missing a finger. School 1 is organized under the four category headings presented in table 7.

Classical Christian Teaching and Learning (Producer). Because this research was conducted on leadership throughout the organizational lifecycle by means of a focus group with school leaders, the researcher had no first-hand experience observing the teaching and learning in the classrooms of the school. This was not the case in some of the other schools where the researcher did get to sit in on classes. Moreover, no formal or informal assessment of student outcomes has been performed on School 1 for this research. Instead, the data sources are the pre-visit questionnaire, the lifecycle diagnosis, the PAEI codes, and the potential improvement points. Several pieces of data for School 1 seemed relevant when it comes to classical Christian teaching and learning. This area is comprised of areas related to faculty training, student life, curriculum, instruction, assessment, and educational philosophy. It is worth noting that the school's principal is Paei while the school's dean is Pa--. One staff member in the focus group was pAei and one teacher was PaEi. Overall, the group was strongest in the Producer orientation, which makes sense given that the school is in its first year. The Teaching and Learning function of the school is most like the Adizes P function because the purpose for which the school exists is to educate students. Therefore, School 1's main business is in producing academic results in students' lives.

Other aspects of School 1's teaching and learning were relevant for answering the research questions. The participants reported the following potential improvement points related to classical Christian teaching and learning:

1. We do not have a plan to onboard and integrate new students with little or no Classical Christian educational background.

2. We do not have time to observe other classroom and teaching styles for purposes of both quality control and learning from one another.

3. We do not have a plan for robust classical training for teachers.

These potential improvement points match with the stage of infancy where the school lives for being effective in the moment; it is survival mode in that tomorrow is not a concern but just making it work today.

4. We do not have a way to ensure that teacher training adequately equips teachers to teach according to classical.

5. We do not have habit training for students' respectful interaction with authority.

6. We do not have a plan to find teachers in all fields of study that will help advance the North Star vision.

7. We do not have an established scope and sequence for a complete high school program.

These potential improvement points seem to indicate that School 1 is not on the Adizes Optimal Path when it comes to classical Christian Teaching and Learning. There have been problems finding teachers, training teachers, and providing curriculum for teachers.

8. We have limited academic support for struggling students.

9. We do not yet have a clear approach to navigate and decide between advice from other authorities and guidelines in printed materials. .

10. We do not have established criteria for evaluating all staff.

These potential improvement points show that the management of School 1 is still in its infancy when it comes to the industry of private education. Despite the many giftings in the group, none have started a school before, so the school was "born" with various unplanned functions of the school.

School 1 lacks plans, processes, and time, which all bear the marks of infancy. With administrators also teaching classes and the board also doing administration, School 1 was in survival for its first year. These potential improvement points in the area of teaching and learning reveal that School 1 is simply inexperienced. The school lacks the internal capabilities and functionality to care for itself and needs help from others outside the organization. They lack the standards, structure, and organization that will come once the school has some more time in the world. During infancy, the focus changes from generating ideas about the future to producing results in the present. The Production role

is similar to the mother with a newborn infant. Adizes writes, "She is always feeding, rocking, and changing her baby."[6] The focus during Infancy is not on the social or cognitive needs for thriving but on the basic human needs for surviving. School 1 started as a K-7 and was able to reenroll the majority of the existing families as well as triple their enrollment for the second year of operation. This is a strong confirmation of their success in the Producer role in their first year of operation.

Thus far, this research has only described the typical path that organizations take through the school lifecycle but has not mentioned the optimal path in the Adizes literature. This was added in later editions of his book after studying franchises and new businesses that were started by businesses in Prime. Adizes defines the optimal path as "the shorter route to prime where the organization develops the needed capabilities simultaneously rather than sequentially."[7] The main evidence that School 1 is not on the optimal path when it comes to the Teaching and Learning (Producer) subsystem is that none of the teachers are experienced or experts in the classical Christian methodology. Although School 1 has done ad hoc training through school visits, conferences, and videos, they do not have experienced academic leadership. The teaching and learning will be developed sequentially in subsequent years rather than simultaneously. As the school grows from K-7 to K-12 in future years, they will be developing capabilities one-by-one, which is the typical path. This assertion is made based upon the lack of a scope and sequence, unclear classical Christian academic identity, and the backgrounds of the school leaders as homeschooling moms fairly new to the classical methodology.

Marketing and Admissions (Integrator). This subsystem of the school refers to the school's capabilities in three areas: (1) to craft messaging and communications consistent with the school's classical Christian mission identity, (2) to effectively

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[6] Ichak Adizes, *Managing Corporate Lifecycles* (Santa Barbara, CA: Adizes Institute, 2004), 240.

[7] Adizes, *Managing Corporate Lifecycles*, 127.

internally communicate that message to their faculty and families with the goal of retention, and (3) to effectively externally communicate the message through the website, word of mouth marketing, and strategic enrollment events to recruit and enroll new families. Parent retention and education is quite difficult for most classical Christian schools because it is a niche educational model. School 1 articulated a number of potential improvement points in this area:

1. Parents do not yet have a solid understanding of our identity and who we are.

2. We have not yet established our own identity and brand within the spectrum of Christian classical education.

3. We do not have consistent alignment or buy in with parents about expectations and standards for work/assignment completion outside of the classroom.

One of the ways a researcher can diagnose a school is by looking at how the problems are solved, improved, or remain unchanged over time. Given the time limitations of this study, only time will tell how management will solve these parent engagement and institutional identity issues. These issues seem germane to infancy in that the market of parents is still in the process of validating the new school's educational offering—classical Christian education can be difficult to understand when so few of the parents went through it themselves. It is promising that the school's leadership has created a portrait of the graduate, which shows that there is an entrepreneurial orientation toward the future and not merely an attitude of getting tasks done. One other potential improvement point in this area was:

4. We lack a robust marketing strategy to enhance and expand our brand and to clearly and broadly imprint who we are in the hearts and minds of perspective students and families.

Although the school does have a professional website, it is clear that the school is still figuring out what they mean by classical and Christian. They are still taking steps to move from the abstract to the concrete. They have developed a vision for graduates but are still working to operationalize that vision. It is interesting to note that they hired an administrative staff rather than one that is academically minded. Most signs point to

infancy in this area as well yet there is at least one sign of Go-Go: the school has consistently done information nights to show and tell the school to outsiders. These events have gained traction over the course of the year and the school is seeing the benefits of their consistency in this area.

Adizes writes, "We have to focus on the input if we want the output to occur."[8] School 1 is not merely seeking to fill seats so that they can get a building and turn a profit—their goals go far beyond the pragmatic and are aimed at the transformation of students' lives as evidenced by their vision for graduates and their discipleship model. As far as outputs, the school has +90 percent retention, a tripling of enrollment from year 1 to year 2, and all of this at a much higher tuition price in year 2. From a business perspective, it seems that the local market, which is quite large at over 500,000 general population, is validating their offering. School 1 shows high levels of Integrative management internally but has also demonstrated the internal capability to integrate the school with the local market beyond the school's four walls.

Finance and Operations (Administrator). Even though the main point of the academy is teaching and learning, the finance and operations component ensure that the means are in place that guarantee the organization produces results that satisfy the clients' needs. Similarly, an airline's focus is employing pilots who transport passengers, but the pilots represent the smallest amount of employees for an airline due to many tasks associated with transporting passengers: ticketing, scheduling, baggage, marketing, pricing, and many more. Finance here refers to the administrative systems associated with tuition, expenses, and payroll. Operations is primarily referring to all the backstage work that needs to be done to make the school run. Operations also includes human resources, contracts, handbooks, building and grounds, and similar tasks where the employee is not working directly with the student; tasks where employees are working directly with the

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[8] Adizes, *Managing Corporate Lifecycles*, 195.

student fall under teaching and learning. The problems of School 1 seem consistent with the fact that they are in their first year:

1. We have too few people being involved, and existing staff have to do many things that they are not equipped to do well, or lack the necessary experience.

2. We are concerned that with many people doing many roles, attention is divided and not everything is being done well. They're getting done but not well, just good enough.

3. We are concerned about the high potential for burnout among our early stage administrators/staff

Each of these problems shows signs of Infancy. The problems that emerge throughout the lifecycle are due to the fact that the four subsystems are developing unevenly at different speeds. Adizes regularly compares the infancy stage to the process of raising a newborn and that is exactly what these potential improvement points sound like. The founding board, admin, and teachers are constantly responding to the operational needs of the new school. This means that there is little margin for doing long-term work in the areas of facilities planning and fundraising (E) and marketing and admissions (I). These three potential improvement points make sense that there are less than ten employees of the school and less than twenty students in its the first year; none of the individuals involved have experience leading a school so they are learning on the job.

The focus group potential improvement point generation revealed issues related to the economic model of the school:

4. We do not have a sustainable funding model for the schools long-term needs including competitively paid teaching staff.

5. We do not have one person over seeing culture and flow. Everyone on campus is in their classroom. We need someone who is just an administrator.

6. We are concerned that the school can't continue because tuition seems so low.

The hard income coverage of School 1 during its first year was less than 50 percent, which is extremely low and poses significant risks for the sustainability of the school.[9]

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[9] Independent School Management recommends that this number be above 90 percent. That being said, School 1 was burdened with extra one-time costs due to starting the school; and the leadership of the school had done multi-year financial modeling to show that the first year would be an investment in

Fortunately, this will change during year 2 of the school where there are triple the amount of students and a higher tuition cost. One of the difficulties that School 1 experienced in year 1 was startup costs with little upfront investment from donors. Additionally, having only eighteen students with well-below-market tuition makes meeting payroll difficult.

Overall, School 1 shows more signs of Go-Go than Infancy when it comes to operations and facilities based upon three observations. Go-Go is the stage in the lifecycle after infancy and before adolescence where the organization has a successful product or service, rapidly growing sales, and strong cash flow.[10] First, School 1 has partnered with a third-party organization to handle much of their administrative tasks. Second, School 1 has hired a full-time staff person to handle a lot of the backstage operational work so that the principal and dean can manage academic activities. Third, School 1 has three very administratively savvy board members. Right now, they are functioning like administrators but are aware of the need to shift toward governance once the school's operational and academic administrators are more mature. Of the six schools who participated in this study, the most organized and responsive by far, was School 1. It is not surprising to see the school tripling in size going into its second year based upon the commitment of its backstage leadership.

The Optimal path is "the shorter route to prime where the organization develops the needed capabilities simultaneously rather than sequentially."[11] Based upon their partnership with a third-party group who is both expert and experienced, it is likely that School 1 is on the Optimal path when it comes to finance and operations. They have multi-year financial modeling and have adjusted their tuition for year 2 to move the school out

the future of the school. Based upon the tripling of the school's size and the increased tuition, the school's financial and operational leadership has already demonstrated an ability to collectively solve problems and successfully realize a change initiative.

[10] Adizes Institute Worldwide, "Lifecycle Page," accessed September 27, 2021, https://adizes.com/lifecycle/.

[11] Adizes, *Managing Corporate Lifecycles*, 234.

of living hand-to-mouth and being overly-dependent on fundraising. The one question though, is, "Does School 1 rely mostly on policies and procedures (A) to organize or does School #1 organize through vision and values (I)?" Based upon the PAEI codes among those present at the focus group, the existence of the Integrative management style in the group was twice as high as the Administrative management style. The Optimal Path entails that the I function is present in the early stages of the lifecycle, and the PAEI codes of those at the focus group might point to School 1 being on the optimal path based on their presence of I.

One way it would be evident that School 1 had a strong I culture would be through a well-defined onboarding process with new employees. However, everybody is a new employee at School 1 so it is unlikely that each person is taught a common language to understand the school's vision for the future, why they exist, and the core virtues that drive daily behavior. Usually, organizations born in Prime are born from parent companies like a restaurant franchise or a company starting a new division; they are born with the DNA of the parent company which is clearly not the case of School 1.

Fundraising and Facilities (Entrepreneur). One of the marks of a school in Prime is independence from external sources. Like an adolescent still dependent upon their parents for housing or transportation, an Adolescent school typically leases space from another entity or has to share space with a local church. School 1 is definitely in Infancy when it comes to their facilities scenario since they are renting a few classrooms from a church where some of the founders attend. During the PAEI code exercise, three of the board members during the focus group showed that they have E as a dominant style in their management. They have expressed a desire to move from administration to governance. The board has three fundamental responsibilities: guard the mission, grow the money, and support the head of school. The board must be strategic, or generationally-minded, to ensure that the school goes from start-up to sustainable. The head's role is management and operations. At School 1, the head of school is essentially one of the

members of the board since neither the principal nor the dean has experience in organizational leadership.

While there a lot of potential in the area of fundraising and facilities, the focus group revealed a number of potential improvement points:

1. Parents don't know the board and vice versa.

2. We do not yet have a facility that meets our needs (ideal location, set up, timing, terms and price).

3. We have not yet found an existing facility that requires minimal capital investment and can be least at a reasonable cost for several years.

4. We do not have a process in place to recruit new or replacement board members.

5. The school is quickly running out of space in their current facilities arrangement yet they do not have the facilities solution.

These are typical problems on the path to Prime that are consistent with the Infancy stage. It is worth noting that all the potential improvement points revealed by participants do not necessarily indicate a problem with the school, but in fact may reveal a strength. For example, the board's strongest relationship should be with the head of school, not the parents. The board members mostly understand this based on the pre-visit questionnaire responses. In the pre-visit questionnaire, the board member wrote, "The board is responsible for governance, compliance and approvals for significant decisions such as major hires, organizational changes, partnerships, facility, etc. The administration runs the daily affairs of the school—teaching, parent/family relationships and school operations."[12] Often times, the parents do not understand the purpose of the board, so it is actually more of a misunderstanding of the board's purpose on the participant's part to write that particular problem on an index card. The reason board problems are included under the fundraising and facilities category is that issues related to long-term effectiveness pertain

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[12] The board should not be responsible for major hires but should be responsible for approving a budget from a head of school that outlines which major hires need to be made in future years. Because the school lacks a head of school, the board is engaged in this task. This is suboptimal because it takes the board away from their highest and best use, which is guarding the mission, growing resources, and supporting their one employee, the head of school.

to the strategic plan and strategic financial plan. Someone needs to know what the fundraising investments are for and how much they are going to cost. Additionally, someone in the school needs to be aware of the current and future needs and opportunities in the market and how the school should act in light of those realities. Issues related to long-term fundraising and master campus planning fall to the board and head of school.

Due to the P needs of infancy, these issues are not being entirely neglected but they are secondary at best. Imagine a small canoe with four people taking in water—three of the people are bailing water out with water pails and one is scanning the horizon as the canoe is beginning to sink rather than help solve the immediate needs. Once the administrators show themselves capable of keeping the school afloat, the governing board can look to the horizon to raise the money to fund the long-term vision, which will include a long-term campus.

It is worth noting that the founding board was able to raise $40,000 in their first year which was more than half of their budget. During School 1's courtship, they reality-tested all their plans through financial modeling and were aware of their need for fundraising before their first day of school. This shows a great deal of entrepreneurial foresight and demonstrates that the leadership is comprised of creative contributors at the board level (PaEi); they are able to both dream and to do. The operational leaders are much more oriented toward P and have not yet developed the E component of their leadership. Having administrators weak in E and I could prevent the school from growing in the long-term. The fundraising and facilities aspect of the school shows the signs of infancy as well but also demonstrates signs of being on the optimal path where capabilities can develop simultaneously rather than sequentially. This will dependent upon the growth of the administration and the hires made in the coming years.

School 1 has no strategic plan because they wanted to focus on their annual operational plan first. The Producer function is strong on the School 1 founding team and many of their change initiatives in year 1 were successful because of the mutual trust and

respect present at the school. Based upon the eleven steps of the Adizes methodology, it seems wise that School 1 would wait on articulating a clear vision for the future until they "bail out some more water from their canoe." In other words, there appear to be some controllable problems in the present that could be dealt with before a strategic plan would be crafted. For example, finding a medium-term solution for facilities must be a priority. Table 8 gives a summary of school 1.

Table 8. School 1 (Midwest) case summary

Category	Lifecycle Characteristics (Stage) & Leadership Contributions (PAEI)
Teaching and Learning (P)	K-7, leadership needs training, no scope & sequence, lack training, Infancy; the leaders did a course and feasibility study and visit conferences and go to other schools, late infancy but appear to need stronger academic leadership, <u>late infancy</u>
Marketing and Admissions (I)	18 students, tripled enrollment for two while raising tuition, has website, does info nights, wants to grow, Late-Infancy/Early GoGo, needs to operationalize mission & communicate it internally better, <u>late infancy/early Go-Go</u>
Finance and Operations (A)	Hired a staff person who does not teach A, increased tuition based upon multi-year model E, partners with a third-party group to be responsive and organized (P/A), might be on optimal path but don't know about vision & values in HR onboarding (admin is weaker than board), <u>late infancy-early go-go</u>
Fundraising and Facilities (E)	Leasing church, 3 high capacity leaders on board with favorable PAEI codes for a school startup, no head of school but only teacher-admin, weak admin from org perspective draw the board down into admin; the school has no strategic plan which fits with the Adizes methodology, late infancy with signs of optimal (higher I than the admin), waiting on SP is wise, <u>late infancy</u>- just made an admin hire
Overall Lifecycle Stage: age=1, people wear many hats, almost 600,000 general population with ~$100,000 family median income. The school is in early Go-Go due to the near-Prime birth in Administration and the enrollment growth. The school was not planted by a parent school, but by enthusiastic and committed founders who are learning classical.	

School 2

  School 2 is an eighteen-year-old PK-8 classical Christian school in the ACCS Southeast region that acquired a campus in 2021 with a headmaster who was hired in 2019. Here are some of the highlights from the pre-visit questionnaire.

1. Has board meets on monthly basis.

2. Purchased and relocated to its present campus in 2021.

3. Has seen growing enrollment, retention, and total FTE for 3 consecutive years.

4. Raised $600,000 in 2020-21; total budget is approximately $1.4M.

5. Enrolls students in pre-Kindergarten through 8th grade.

6. Has a vision to launch a rhetoric school but does not have space to house it.

7. Wants to do capital campaign but has not developed a strategic plan and strategic financial plan.

8. Has an underdeveloped administrative leadership team; role confusion & no clear quarterly goals or weekly meeting cadence.

Schools 2-6 are much more difficult to analyze from both a PAEI and lifecycle perspective because they involve more complexity than School 1 due to their number of students, participants in the focus group, and the age of the school. Therefore, it is essential to precisely distinguish between the Producer and the Administrator Function, since only schools in Go-Go and Infancy lack the Administrative function. To run a sustainable school, there must first be effective teachers (Producers) and then productive oversight of the teachers' activities (lesson plans, professional development, student discipline, grades, parent communications). Teachers meet the needs of the tuition-paying parents by serving students and administrators meet the needs of teachers by helping them perform at their best. They are both performing the Producer management function within their respective roles; they are management roles because interdependencies are being navigated. The teachers need the school administration and the administration need the teachers; neither could be successful without the other.

Management in School 2 is still being developed but is needed for problems that cannot be solved by just one individual teacher, administrator, or staff. The teacher could not do it all alone nor could the administrator do it all alone. The Producer role that is focused on the school's main business, teaching, and learning is not enough in School 2 or any school for that matter. The school also needs supplies and money, accounts receivable and payable, communicated calendars, student information systems, donor databases, and

108

universally understood schedules that get the right students in the right places with the right teachers. Costs must be controlled, budgets must be adhered to, systems utilized, and implementation supervised. Imagine an airline that only thought of pilots and flying but neglected baggage transportation, equipment maintenance, and ticket sales. The pilots would not be flying if these administrative details were not tended to as well. An airline would not put precious cargo into faulty planes, nor should a school put vibrant classrooms into an unstable institution. Adizes writes in *The Ideal Executive*, "All this is the role of the Administration, which should be managed by a person who style is compatible with the needs of this role."[13]

Teaching and Learning. On this particular case study visit, the researcher was able to observe classes for an entire day. Therefore, it is possible to make some general observations about the school's house program, the classroom instruction in grades K-8, as well as the overall student life. Three observations stand out from the day of observing classes. First, a number of strong faculty members understand Classical Christian education, cultivate an atmosphere of joyful order, and deliver effective instruction from the well-designed curriculum. The most impressive classes were those in history, Bible, logic, and literature. Second, there is progress to be made in the area of Upper School Science as well as in the classroom management skills of some of the part-time teachers. These are typical problems in K-8 classical Christian schools. The absence of the 9-12 grade students leaves a void that often results in an immature or adolescent school culture in those middle grades. Third, there were many evidences of intentional academic leadership based upon shared instructional and classroom management practices across the grades. Moreover, a handful of the teachers observed during classroom visitations

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[13] Adizes, *The Ideal Executive*, 53. This quote is really important—your style should match your role. If your PAEI style does not match the PAEI needs of your role, then the organization will demonstrate predictable deficiencies. The administrator does not produce that for which the organization exists. A synonym for administer is "to serve." Adizes writes, "Administration serves those who Produce (i.e. meet the needs of the clients)

were also active and engaged participants in the focus group experience. The school's daily assembly involved reading Scripture, catechism, and singing a hymn, which was followed by teachers leading a House Activity. The content was true, the organization was good, and the ways students were engaged in significant learning was beautiful.

During the focus group, participants revealed a number of problems related to teaching and learning:

1. There is not 100 percent buy-in from teachers pertaining to the purpose and methodology of classical education.

2. Lack of well-defined administrative roles

3. Student behavioral issues—too much is tolerated

In conversing with the head of school and in reading the pre-visit questionnaire, it became clear that there was no clear academic leadership team at the time of the school visit in spring 2022; however, participants in the focus group are ready, willing, and able to increase their leadership commitment and are also qualified to do the work based upon their PAEI code. There was plenty of presence of A within the participants of the focus group, but the head of school is more of an academic leader than an organizational leader. Therefore, he has not yet taken the time to clarify the organizational structure or develop core processes that all must follow. However, he is strong in E and P and has since hired someone who injects the A skillset more into the school's leadership and structure. Moreover, the head of school has since formed a leadership team and conducted a multi-day retreat with the school's new leadership team to gain traction on the school's goals. One additional item worth noting, based upon the classroom observations, is that the school leader has inherited a handful of teachers who are clearly not as high of a quality as the others.

During the focus group, the final activity is when participants share what they think the school's lifecycle stage was. Here were some of the notable responses related to teaching and learning:

4. Go-go: Everything is a priority, and there is confusion in roles.

5. Adolescence: We are finishing going through the "second birth," which is a change from entrepreneurial to professional management

6. GoGo: Successful, growing—customers are not raving—inconsistent HR

In the aforementioned lifecycle diagnoses of the focus group participants, three observations begin to answer the research questions. First, School 2's focus group participants diagnosed the school as either in Go-Go or Adolescence. Second, one participant, a self-proclaimed historian of the school who has been there for more than ten years, shared that different areas of the school were different stages of the lifecycle. Third, one participant shared that the school is "entering into a rebirth for the Rhetoric stage (grades 9-12)."

In light of these observations, it is fair to conclude that differing areas of School 2 are in varying areas of maturity. For example, the Lower School has been in existence longer and is more settled. With Upper School, it is difficult to retain students when there are no grades 9-12 and cultural problems with the students begin to emerge. Additionally, it is important to note that sometimes a participant's lifecycle diagnosis may say more about the area of the school that they work in and their own PAEI code. There are different latitudes and longitudes throughout an organization and different temperatures and climates. Additionally, the absence of a rhetoric school or plans for a rhetoric school show a lack of entrepreneurial planning. Overall, there was an overall maturity to this eighteen-year old school in the teaching and learning domain of the school. The teachers seem to be producing results that the parents like which is confirmed by School 2's enrollment increases and their retention numbers. The school has not yet taken the steps of pursuing ACCS Accreditation but is an ACCS member.

Marketing and Admissions (Integrator). School 2 reported potential improvement points in the area of marketing and admissions that help saturate the research questions with data. Participants named the following problems:

111

1. Few parents understand and value the classical part of the school's mission.

2. There are families in the school with conflicting or opposing values to the school.

3. Poorly Articulated vision and Christian classical education philosophy

For an eighteen-year-old school, these problems is likely due to new academic leadership and new families. During the lifecycle diagnosis, participants stated that the admissions function is in Go-Go, which fits with the external output that shows increasing enrollment and retention for three consecutive years. The lack of a strategic plan often results in the lack of consistent and strategic internal marketing to families about why the school exists, where it has been, and where it is going. Because strategic communications is an 'E' activity, it has largely been crowded out by the activities that are dominating the present: a facilities move, onboarding new faculty and new students, and the first time headmaster to train the faculty to teach using a common language and a common skillset. It seems clear that this subsystem of the school is in Go-Go. One participant shared, "While admissions is in 'go-go,' as a whole we are adolescent. As a historian of the school, I am hopeful for a renaissance." To reach Adolescence, the school's leadership must craft a strategic plan that is later translated into a compelling internal communications plan. It appears that maintaining the day-to-day of admissions has crowded out internal marketing. This is exacerbated by the fact that both the head of school and the admissions director have significant teaching responsibilities.

Finance and Operations. During the focus group, School 2 shared the following potential improvement points related to finance and operations:

1. Excellence at the school appears to be person-dependent

2. Lack of funding to address staffing needs.

3. Many systems are person-dependent without clear, systematized job descriptions.

4. Everything is a priority; inconsistent HR management; confusion of roles & responsibilities

5. School appears stuck between its aspirations and its ability to take additional financial risk.

These improvement points were evident in the teaching and learning section, but even more evident when it comes to finance and operations. At the time of the focus group, School 2 had not devoted much time to clarifying their structure. This is largely due to a new headmaster getting settled, transitioning locations, and the consistent enrollment growth. The needs of the short-term have crowded out the attention of management for the needs of the long-term. These many changes have caused the different areas of the school and the different constituencies of the school to get out of sync. Although the school lacks clear structures for its leaders, the presence of veteran teachers makes the school operate in an organized and systematic way; therefore, this school is not in infancy. It appears that the school is transitioning from entrepreneurial to professional management, which fits with the fact that the head of school, soon after the focus group, hired another administrator who is stronger in the organizational, administrative, and financial component of school life. It is likely that the human resources development function is weak, and people have competing visions of success because they have not been defined by the institution's leadership.

Because another administrator was hired and an administrative leadership team was formed soon after the focus group, it seems that this aspect of the school is in Go-Go. Policy manuals have been in place for years as well as increased trends in the number of total employees. The school has not had a lot of financial margin with the purchase of a new building in the past year. One comment from the focus group lifecycle diagnosis seems relevant to the finance and operations component of the school: "Lower school is really in growth, excitement and 'go' mode. Upper school is in adolescence due to the building and crumbling of Rhetoric school. We are somewhat secure insofar as our team has been here and cohesive for 5+ years now but we're also entering into a rebirth for the Rhetoric stage." For Rhetoric to be founded and flourish, there will need to be strong PAEI subsystems present that grades 9-12 can draw from as they expand. The school now owns

a campus but does not have someone to professionally manage it. It is likely that the school will need to raise tuition.

It is important to note that the school appears to be well-organized in that they were able to acquire a new campus and move into it in less than one summer. Although School 2's campus is much smaller than School 6's campus, the execution of the board, parents, teachers, and administrators to transfer campuses on such short notice shows their strength in the Producer and Administrator function, which have caused the school to be efficient and effective in the short-term.

Fundraising and Facilities (Entrepreneur). Although School 2 was successful in purchasing their current building, they have not managed to produce a strategic plan or strategic financial plan, yet the school is in year 18. This could be indicative of a lack of "E" in certain pockets of the school; namely, the Board and Executive Leadership.[14] The Board's purpose is strategic and generational, not operational and administrative. It was noted also in the pre-visit questionnaire that there was a lack of common vision among faculty, board, and families. It appears that the Board might be not operating according to the highest purpose. The pre-visit questionnaire reports,

> There is a set of bylaws and a board policy manual. Board meets once per month at which administrator reports to board. Board sets policy and agenda for Head for next month or months. Individual board members lead subcommittees for various topics—budget, facilities, fund raising, curriculum, strategic planning—which meet with administrator periodically or serve as advisors to administrator.

The issue is that the board is living in the current year which means that the "E" and "I" functions have not yet appeared in earnest. The lack of "E" and "I" within the head of school and the board malnourishes the institution. During the focus group, participants reported the following potential improvement points related to fundraising and facilities.

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[14] These are two of the eighteen ISM Stability Markers.

1. The lack of a multi-year strategic plan developed by the board,

2. Lack of strategic planning and Lack of Rhetoric School.

3. Lack of funding to address building needs.

4. Inadequate physical space: two grade levels share classroom, music, office space,

5. There is no indoor gathering space which limits opportunities for people to come together to build culture and community.

6. There are not enough classrooms and we don't own the property next door. The property is largely in a floodplain which makes development difficult.

Obviously, there were many problems related to the campus. The pre-visit questionnaire reports,

> We purchased 4.5 acres with a small school campus in June 2021. We have 8 sizeable classrooms surrounding a decked courtyard. We have a converted ranch-style house with two classrooms, 3 offices, a small multipurpose room, a teacher workroom, and a kitchen. A third building has three small classrooms housing two kindergarten classrooms and a music room. We have a large playground and a large playing field. We lease 4.5 acres adjacent to this property on which is a ranch house converted to a preschool of three classrooms, an office, an entry area, and a small kitchen. It has a large backyard functioning is a preschool playground.

The lack of a clear shared vision articulated in a strategic plan or strategic financial plan is evidence that the school is either in Go-Go or Adolescence when it comes to fundraising and facilities. The school was able to raise $600,000 for the campus and then take out a mortgage for the rest. Without a compelling multi-year vision and plan, it will be difficult for the school to align the many different constituencies and sustainably fund the future vision. This researcher would guess that the structure of the board, similar to the structure of the administration, needs to undergo a rebirth. However, this researcher did not see evidence that the board is aware of this needed change, which leads the researcher that the school is confident and in Go-Go in this subsystem.

Table 9. School 2 (Southeast) case summary

Category	Lifecycle Characteristics (Stage) & Leadership Contributions (PAEI)
Teaching and Learning (P)	K-8, head of school is strong academically, lacked a leadership team but just made a hire, not having 9-12 affects the middle grades, many strong teachers <u>Adolescence</u>
Marketing and Admissions (I)	Lack of strategic plan impacts the internal communication, school has been growing, admissions has crowded out marketing, need a communication plan for the 9-12 launch, need better HR, <u>Go-Go</u>
Finance and Operations (A)	Newly formed leadership team will have an impact, events and house are well-organized, pulled off a move on short notice, <u>Go-Go</u>
Fundraising and Facilities (E)	Weakest area of the school yet biggest opportunity, administration team formed which means board can now do macro governance, need SP and SFP for multi-year fundraising, they engaged the focus group
Overall Lifecycle Stage: age=18, they've begun to decentralize authority by forming a leadership team. They need to inject E into the school by means of a strategic plan and strategic financial plan with a corresponding internal communications strategy. <u>Adolescence</u>	

School 3

School 3 is an ACCS-accredited PK-8 in the ACCS Midwest Region and is in its fourteenth year with 155 students. The head of school is in his fourth year and the school meets in rented facilities that have become inadequate for the growth. The school plans to start 9th grade in the next year and has 210 students enrolled for the upcoming school year. Additionally, the school has plans to move to a new campus in the summer of 2022. Participants in the focus group shared potential improvement points in teaching and learning, finance and operations, fundraising and facilities, and marketing and admissions.

Teaching and Learning (Producer). School 3 is similar to School 2 in that they are both PK-8 with a goal to become PK-12. The difference is that School 2 has more students, is a few years older, and owns their own campus. School 3 is different than Schools 4-6 in that those schools serve through grade 12 and are all more than 20 years old. Some of the potential improvement points mentioned during the focus group include:

1. Lack of systematic onboarding for particular students especially in Latin
2. Lack of collaboration and communication between border teachers

School 3 doubled in size over two years, and teachers perceived that better onboarding strategies and collaboration needed to internally develop to manage the growth.

3. We are underestimating high school build and efforts

4. Student assessment expectations are unclear to teachers

Both School 2 and School 3 are in the process of planning to sequentially add grades 9-12. School 3 is beginning with 9th grade in 2022 whereas School 2 is beginning in 2023.

5. Inconsistency amongst teachers with student discipline

6. Student discipline appears to be too case by case

7. Teachers inconsistently using plot-structure diagram for literature

These are clear marks of adolescence within teaching and learning because the institution is structured around the preferences and needs of the individuals rather than the individuals structuring around the needs of the institution.

8. Chapel does not fulfill its purpose of engaging students

9. Some teachers who do not understand or execute Christian classical education

10. Not enough qualified teaching candidates for our openings, especially math and science

11. Teachers need training on how to create Christian classical education summative assessments in all subjects

12. Lunch/assembly/hallways lack greater joyful order

One of the weaknesses of Schools 1-3 is the youth of their leadership; they are still in the infancy of their careers as administrators. The leadership of Schools 1-3 are young parents whereas the leaders of schools 4-6 are more seasoned. Although the lifecycle diagnosis in the Adizes methodology is not determined by tenure of administration, enrollment size, age of school, or market demographics, it is definitely impacted by these factors. School 3 was newly-accredited by the ACCS in 2021.

More seasoned leadership exists in the lead-teacher and the curriculum director who have both been in education for more than two decades, but these individuals' main roles are teaching, not administration. One difference between School 2 and School 3 is

that School 3 has two full-time administrators: a head of school and a principal. The principal is in charge of the day-to-day academics, faculty development, and parent relationships whereas the head of school is in charge of research and development, fundraising and finance, board, and organizational change.

When it comes to the lower school, School 2's Producer function (teaching and learning) appears to be in Adolescence overall. It would be fair to say that the lower school (grades Pk-6) is in adolescence since it has had more time to age and mature. However, grades 7-12 are in later Go-Go while some of those grades still in Courtship since they do not yet exist. It is difficult to avoid the feeling of constant change associated with Go-Go when a grade of students is being added per year, which comes with the necessity of hiring more teachers. Moreover, grades 7 and 8 were combined until a midyear hire in 2021-2022, and grades 5 and 6 were combined until the 2020-2021 school year. Regarding the upper school, it is still in late Infancy or early Go-Go. The school has done a few events to advertise grades 9-12 but these are still plans on a paper and not people in a classroom. It is worth noting that both the principal and the head of school are PaEi, creative contributors. Additionally, the principal has previously served as a teacher and an administrator adding grades 9-12 at a different classical Christian school.

Marketing and Admissions (Integrator). Over the past four years, the school has gone from 75 students to 155. Internally, the school has redone its website, written digital and print creative assets to market the school, and published weekly on the school's blog. To be effective in internal marketing, the school has also done parent surveys, board surveys, and teacher surveys to ensure that various constituencies have an opportunity to give feedback. The following potential improvement points were revealed during the focus group:

1. Some families do not understand Christian classical education
2. Lack well-researched and well-communicated 9-12 plan for parents

3. We need more volunteers, because 80 percent of our volunteer time is comprised of 20 percent of people

4. Parents' perceptions/fears around change that we might lose sense of community

5. There are different perceptions amongst new, medium, long-term parents

       The school appears to be in Adolescence when it comes to marketing and admissions, because there is much change with new families, the school is navigating it with appeals to core virtues as well as the core administrative processes. The majority of the parents are new to School 3. However, there was a strong integrative function among the participants in the focus group which helps the school community stay together while the organization changes. The stage of adolescence is the time where School 3 must continue to internally develop the necessary capabilities to process the expansion.

       Finance and Operations. In comparing schools 1-3 to 4-6, schools 1-3 have far less operational staff to run the back office of the school. In School 3, one individual does the majority of administrative functions of the school related to finances, facilities, events, communications, admissions, communications, and scheduling. School 3 has aggressively raised tuition over the past three years and covers more than 90 percent of expenses through fundraising. School 3 also has the highest family median income and general population within ten miles out of any of the schools in the case study. However, there is some private school competition and private school is comparatively less common in the Midwest.

       Some of the potential improvements in this area for School 3 are:

1. Lack of resources in Human Resources and other support functions.

2. Principal's available biweekly meeting times are almost filled up

The head of school has functioned like the entrepreneurial visionary whereas the principal has been the steady producer and administrator. In Adizes, nobody should be in a management role that does not have the Integrator function as one of their strengths. The potential improvement point from the focus group demonstrates that the principal had more than 12 direct reports whereas the head of school only had two direct reports.

Other potential improvement points for this area are:

3. Lack of inconsistent pay and benefits for faculty and staff

4. Vulnerable to loss of certain key individuals in our faculty and staff

5. Lack of expertise and specialization in faculty and administrative functions

6. Many administrative functions do not yet have a high level of expertise behind them.

7. Difficulty of connecting and communicating with part-time faculty and staff

8. Risk becoming too expensive for some mission-fit families

With School 3, it appears that employees are generalists with not enough specialization. It is likely that the individuals wear many hats, may be underpaid, and are overworked. This is often the case in schools moving through Adolescence. Overall, School 3 is clearly in need of higher Administrative function. Of the two administrators and the one staff person, none of them possess the A role as a dominant management style. There is a high integrative function in place via the use of the Traction Entrepreneurial operating system and the use of the portrait of the graduate and core virtues in regular communications. A lack of consistent Human Resources as well as compensation issues are associated with Adolescence. School 3 is still person-dependent and shaping roles around individuals rather than individuals shaping themselves around the needed roles.

Fundraising and Facilities (Entrepreneur). School 3 has placed a strong emphasis on fundraising over the past three years. Due to this emphasis, the school has been able to move from its current location to a much larger office building down the street, despite the higher cost. The school has been in the same rented church facilities for the past fourteen years. School 3 has also gone through a feasibility study to determine their readiness for a capital campaign. School 5, due to facilities limitations, has explored taking the feasibility study step but has not yet moved forward. School 3's move is similar to the one that School 2 made in 2020. Some of the potential improvement points revealed during the focus group include the following:

1. Current campus hinders mission delivery and growth.

2. No facilities for 2022-2023 school year (lease ends in July 2022)

3. We are running out of classroom space in our current facility.

4. Incomplete strategic financial plan complicates taking action on admissions, hiring, and facilities.

5. Inconsistent aesthetics of classrooms

School 3 has been in a similar situation to School 5 in that they do the lease one year at a with the host church. This is a Producer approach to facilities where the only focus is getting a well-negotiated lease in the short-term rather than a well-designed campus for the long-term. School 3 has not done any of the sophisticated gift planning that is happening at School 6. Overall, the school is definitely in Adolescence when it comes to fundraising and facilities due to the massive amount of change. Additionally, the majority of the money raised over the past three years is being spent on the move into the new campus. A mark of later Adolescence or Prime would be the planning and completion of a capital campaign or more sophisticated giving platforms on the school website.

Table 10. School 3 (Midwest) case summary

Category	Lifecycle Characteristics (Stage) & Leadership Contributions (PAEI)
Teaching and Learning (P)	Too much is case by case and need for better onboarding and core virtues HR enculturation, adding grades 9-12 until 2026, weak on A in administration, Adolescence
Marketing and Admissions (I)	Needs to communicate well, lots of change, needs to operationalize the strategic plan Adolescence
Finance and Operations (A)	Weakest here, need better onboarding and to document processes, too many direct reports for principal yet have two admin structure, Early Adolescence
Fundraising and Facilities (E)	Flopped on feasibility study, has done well with Annual Fund, preparing for a capital campaign Adolescence
Overall Lifecycle Stage: age=14, The school has changed a tremendous amount in the past four years, but especially in the last two years. The growth externally needs to be complemented by development internally to fully leave the Go-Go stage in all areas of the school. This development has been occurring through another staff hire, a divisional leadership restructuring to reduce the principal's direct reports, and the addition of external board members. The school is mostly in Adolescence.	

School 4

School 4 is a 28-year-old K-12 classical Christian school with 133 students that functions as an educational ministry of a church in the ACCS West Region. The head of school has been in her role for the past eight years but actually helped found the school back in 1994. Previously she served as a teacher and then later as a principal. Like School 1, there are combined grades in certain places where there are not enough students to support having two teachers. In School 4, seventh and eighth grade classes are combined into one whereas School 1 has K-1, 2-3, and grades 4-7 combined since there were only eighteen students in the school's first year. School 3 also had two combined classes until right before the focus group. School 4 is the only school in the sample that is a formal ministry of a church and is housed at that church. The pre-visit questionnaire states, "Because we utilize church facilities rent free, there is always a tension between the two to balance the use and issues that arise. The church is moving slow regarding providing approval and support for much needed additional space even when we secured a free portable building with delivery and set up." The four categories share important information relevant to the research questions based upon the data gathered during the focus group and the pre-visit questionnaire.

Teaching and Learning (Producer). Although this researcher did not have the chance to observe each class, the researcher did observe chapel, middle school logic, senior integrated humanities, and five senior thesis presentations. The senior integrated humanities as well as the senior thesis presentations provided real evidence that the school is training students effectively in the art of rhetoric. The students' presentations were focused, stylistic, and substantive.[15] The classroom environment in logic and

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[15] This researcher has viewed online videos of another school's senior thesis presentations. In that video, the student questions a historically orthodox doctrine of Christianity. In most classical Christian schools, that would be considered a red flag. It is interesting to note that a school with a heretical senior thesis presentations could score well on the ISM Stability Markers. Within the Adizes methodology, the P management role means purposeful performer/producer controls for drift away from the mission to a degree. The P role entails that the school produce the results that align with the school's distinctly classical and Christian purpose. In this study, the researcher did not do a deep dive into the classroom or the spiritual

integrated humanities was engaging, and the students were productively engaging with substantive content. In logic class, students completed a catechism on why Christians should study logic. In the senior integrated humanities class, students studied Melchizidek in Hebrews, learned what happened on that particular day in history, and discussed a few passages of Luther after reading together. Almost all K-12 classical Christian schools do senior thesis and senior integrated humanities, but the curricular alignment between these teachers showed a mature curricular pathway that was being implemented effectively. The senior thesis presentations were also to be delivered on a future date in front of parents which likely helps with gaining repeat demand for this distinctive form of education.

Some of the potential improvement points revealed during the focus group were:

1. We need to finish our Curriculum Guide for WASC / ACCS Accreditation including a Course Lead Sheet and Scope and Sequence for every course we teach

2. We need to correct concerns regarding our math program

3. We need to improve faculty feedback on teaching and evaluations; getting in the classroom to do the evaluations

4. We've struggled to find leaders and teachers to move to our location in rural CA

Schools 4, 5, and 6 are all located in the Northwest and have varying degrees of difficulty attracting Christians to their location due to the political climate and cost of living. Like School 6, School 4 is accredited through WASC but not the ACCS. School 4, despite this, seemed to have a mature and distinctively classical and Christian curriculum and pedagogy. Faculty feedback is likely malnourished due to the fact that there is no full-time principal at the school. School 5 has had trouble attracting and retaining talent to their rural area of the West ACCS region.

According to the focus group, the assessment results on mathematics indicate that School 4 has opportunities for improvement. This aligns with the fact that the school

maturity of the leadership, but instead relied on the qualitative index cards generated during the focus group. Therefore, it is possible to judge a school as Prime organizationally when they are dying theologically.

was founded in the same year as the writing of *The Lost Tools of Learning* and does not place as much value on the quadrivium arts. School 4 was founded during the first generation of schools which bear a heavy focus on the "ages and stages" Sayers approach to the trivium with the exclusion of the Quadrivium that emphasizes math and science. Overall, the Head of School's pAEi code was evidenced by the administrative attitude toward solving academic problems. For example, the pre-visit questionnaire stated, "We need a Spiritual Life director and further development of a written Spiritual Life Scope & Sequence manual to be used by teachers and faculty." This is the first time this researcher has observed the phrase "spiritual life scope and sequence."[16] Additionally, the pre-visit questionnaire stated, "There is a need for a Parent-Student (Grammar and Logic) or Student event (Rhetoric) for spiritual growth for each stage of the Trivium for the purpose of strengthening the family-church-school partnership." This sentence highlights the "ages and stages" Sayers-approach that connects with the school's 1994 founding. School 4 has the most intensive requirement of all of the schools for their parents in that they are required to attend a months-long parenting class the first year of the school. In the past, the parents were required to raise money and meet volunteer hours requirements, all indicators of a high A school culture.

Perhaps the best indicator of School 5's stage in the school lifecycle is the following potential improvement point revealed during the focus group, "Lack of a second-in-command administrative position; need principals for handling discipline, etc." Although the school is almost three decades old, there is still no dedicated academic leader. The head of school is still managing the day-to-day operations and only has part-time help from a second administrator who is also a real estate agent. Although the head of school has E in her code, she does not have the margin to "scan the horizon" or "see through the

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[16] A different solution would be to introduce a catechism for all students that the teachers deliver, do better human resources development onboarding, or do faculty development on integrating scholarship with discipleship. Perhaps the school could breathe more life into its house system. These are not necessarily better, but they are options with a little more "I" in them.

fog" because she has monthly board meetings, no second in command, and is dying the death of a thousand operational cuts every school day.

The majority of participants diagnosed the school as in Adolescence, the stage right before prime. This is a fair diagnosis when it comes to teaching and learning, but there are at least two signs of premature aging at School 4. First, the absence of a second in command at a 28-year-old school is concerning; it does not seem a coincidence that the school's lifecycle code in Adolescence, pAEi, is the same as the head of school, pAEi. The head of school has not successfully raised up the next generation of leaders in her school. Second, the presence of a combined class at a 28-year-old school shows that there is not enough repeat demand to justify separating the classes. School 4 is in a rural community with the lowest family median income of all of the cases. Additionally, this researcher has observed other mature schools that have combined classes due to their rural location. Therefore, these items may be beyond the control of leadership. However, the fact that the school is a ministry of the church and under their authority does impact the overall ethos of the school. It seems to have produced an atmosphere within the school wherein teachers ask, 'Will the church be okay with that?' Although faculty members may attend different churches, they must subscribe to the doctrinal distinctives of the church to work at the school.

Marketing and Admissions (Integrator). School 4 has dedicated energy and resources to improving marketing and admissions. The pre-visit questionnaire states, "We used Schola Marketing for 2 years (2015-2017) to utilize in-bound marketing to recover a declining enrollment and apart from one year of COVID, we have steadily increased our enrollment." The school must work with the grain of the market where God has placed them. The short-term enrollment goal is 150 students within the next two years with the long-term goal to work toward 250 students. The total population is around 40,000 people with a family median income at $47,000. The school's website is well-designed, aesthetically pleasing, and consistent with the ages and stages Sayers-Trivium approach

to classical which ties back to the 1994 founding. Some of the potential improvement points related to marketing and admissions include:

1. We need to fill empty seats in Grammar classrooms

2. We lack parent understanding of cC education and commitment to graduate their students from HOS

3. Struggle with retention of students going into 9th grade; 8th grade exodus

4. Need a system for consistent communication for in-house ; staff & faculty

5. Staff and faculty are like two different teams and need more unity

The PAEI codes of the participants in the focus group were strong on "I" which might indicate that clear unifying communication could be a catalyst for growth in the lifecycle. This seems to be an area of the school that is not aging but is still in its Adolescence. There appear to be opportunities for improvement in internal marketing to the current faculty and families. School 4 does have an admissions counselor at the school in their organizational structure. It is interesting that the school formerly required fundraising, a parenting class, and service hours. They no longer require the fundraising, but still make the parenting class mandatory for incoming parents as well as the service hours for all parents. These were not shared practices among the other case schools.

Finance and Operations (Administrator). School 4 has done good work in increasing tuition without losing families. Successfully implementing a needed change like this shows that the school is not in the dying part of the school lifecycle. Families see the value of a classical and Christian education and the administration effectively communicated that vision and value. Some of the potential improvement points revealed during the focus group as it relates to finance and operations were:

1. We focus too much on what we need to fix rather than taking a balanced approach of where we've come from vs where we need to go (i.e. not good at encouraging)

2. Community perceives the school to be a church-specific ministry, not open to other churches in the area

3. Most, likely 90%, community pastors feel children of believers should be salt & light in public schools

126

Similar to schools 5 and 6, there were a lot of years of experience in the room. The potential improvement point referring to "what we need to fix" could be confirmation that there are some symptoms of mental aging. The individual that shared that particular problem was a paEi management style; an entrepreneurial spirit gets snuffed out in an aging work environment. Problems related to community perception and pastors' schooling decisions could also fit with the "mental aging" diagnosis. In Adizes, Prime is when childlike flexibility is balanced with seasoned control. The church and school have settled beliefs and might need to find the messaging and means to better show how their mission will benefit the next generation.

Other potential improvement points related to operations and finance are:

4. Need more collaboration/input between Board/Staff/Faculty rather than just a process or policy put in place—put more value on people rather than results

5. Need to establish job descriptions and responsibilities so there is no confusion for faculty and staff

6. Need operations manual for Administrative staff

Of all the schools that participated in the study, School 4 was the only school with a participant-generated potential improvement point that indicated a gap between the faculty and the staff. The participant wrote, "Put more value on people rather than results." This perspective came from a teacher while the potential improvement points regarding job descriptions and operations manual came from staff people. One of those staff people also had a dash in her management style code where there would be an e (pA-i). Lacking the vitamin of Entrepreneur is the first step toward bureaucracy.

The majority of the people in the focus group diagnosed School 4 as in Adolescence with the second-most votes going toward Go-Go. This makes sense in the area of finance and operations because of the affinity for policy manuals, the lack of a leadership team, and the power of support staff in running the school. The head of school is pAEi and uses the support staff as her administrative team instead of working with other dedicated leaders. One person on her team, her assistant, has a dash when it comes E.

127

Having no leadership team at this stage seems to be another evidence of organizational aging. The highly administrative culture of aging organizations places more value on legal, finance, operational policy, and human resources than on research, development, admissions, and fundraising.

One evidence that this researcher looks for is evidence of successful change initiatives in the recent past. School 4 did implement a successful tuition increase in the recent past due to the research and development conducted by the head of school. Because she is a pAEi, she does not fear change and often seeks out best practices for improving the school. It is a concern to see a head of school without I in her management style code. Adizes asserts that every member of senior leadership needs I in his or her code in order to be effective. Of all of heads of school in this study, three do not have I in their code. At School 1, there is no head of school and the two administrators do not have I in their code. At School 2, the head of school lacks I similar to the head of school at School 4. Schools 3, 5, and 6 each are led by a head of school with I in their code.[17]

Fundraising and Facilities (Entrepreneur). Despite the presence of "E" in the head of school's code, this area of the school is the least-developed. In the PAEI code self-diagnosis portion of the focus group, the most dominant expression was the A management style and the second was the I management style. A quote from the pre-visit questionnaire accurately states the lifecycle stage of this domain of the school" "We have moved from an operational board to a governing board, but we are somewhat in our infancy regarding that." A board in Infancy is like driving a car with the emergency brake on—it is possible to move forward but progress is significantly hindered. The problem with a board in Infancy is that they only exercise oversight of the present but lack insight into the past or foresight into the future.

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[17] The PAEI codes of these heads of school are School 3 = PaEI; School 5 = paEI; and School 6 = paEI.

Potential improvement points related to fundraising and facilities at School 4 include:

1. Securing secondary classroom spaces that are adequate in size

2. Need a Development Director to lead capital campaign and other donor needs.

3. Need for increased number of external school board members

4. Lack of Board knowledge of governance; inexperienced

5. Lack of teacher representative to the Board

6. Unity between church & school (i.e. vision); need board clarity

7. Inadequate financial contributions

This particular area of the school needs a strong injection of E to stop premature aging. Major donor fundraising has not been a focus of School 4, but contextual factors also impact the school that do not appear to impact other schools in this study. The school is currently limited from a facilities perspective based upon what the church allows. Signs of a growth mindset are evident though in fundraising and facilities on the per-visit questionnaire: "The board and head meet on a monthly basis and are both involved in professional development cohorts." Overall, this area of the school is by far the most under-developed and it affects more than just the fundraising and facilities. This area of the school does not appear to be in Infancy, because there is some division of labor and an awareness of the need for greater expertise; this area of the school is in early Adolescence. It is in early Adolescence because there appears to be more youthful organizational characteristics of flexibility rather than seasoned traits of control.

Table 11. School 4 (West) case summary

Category	Lifecycle Characteristics (Stage) & Leadership Contributions (PAEI)
Teaching and Learning (P)	Although the head of school has E in her code, she does not have the margin to 'scan the horizon' or 'see through the fog,' because she has monthly board meetings, no second in command, and is dying the death of a thousand operational cuts every school day. A few signs of aging: head and school have same code, there's no second in command, inflexible relationship with church, a combined class. Needs work in Math. <u>Later Adolescence with mental aging</u>
Marketing and Admissions (I)	Has done Schola, has admissions counselor, has a combined class still, has facilities limitations and empty seats <u>Adolescence</u>
Finance and Operations (A)	Well-organized, tidy school, did change tuition based upon her research, might be too internally-oriented, no leadership team is an issue, head of school lacks I <u>Adolescence + aging</u>
Fundraising and Facilities (E)	Board partially e-brakes the school, chair in a cohort, constrained by the church, no development director and head with no time to fundraise, not externally oriented <u>Early Adolescence</u>
Overall Lifecycle Stage: age=28, The school is in Adolescence but has two areas in early aging. Being a ministry of a church with a tightly-defined statement of faith comes with advantages and disadvantages. The advantages were the convictional senior thesis presentations while the disadvantages is the local community perception that the school is only for the congregation. The school has empty seats that need to be filled and combined grades in middle school which could be related to this perception. The head of school's weaknesses appear to be the school's weaknesses and there is no leadership team. The culture seems to have too much A and need more E and I to be institutionalized.	

School 5

School 5 started in 1999 (22 years old) in the ACCS West region when several families from a Presbyterian church decided to start a school for their children. They had been reading about classical Christian education and started offering classes that year and graduated their first student in 2009. School 5 is an ACCS-accredited K-12 with 280 students spread over two campuses, one owned and one leased. School 5's campus situation is like School 2 who owns the K-8 campus but is leasing the PK building and land that is adjacent. However, School 2 is a K-8 that is younger than School 5 who is 22 years old and is a K-12. The school is located in the ACCS West region and there are about 500,000 people within ten miles and a family median income of approximately $80,000. School 5 is in a political climate that is hostile to Christians. School 5 and School 6 are both in the Northwest where there are far less Christians. Another similarity

is that Schools 5 and 6 are both led by heads of school with the statesman management code, paEI. The difference though is that School 6 has a head of school with twenty-one years of experience whereas School 5's head has been in the role for four years. Additionally, School 5 is in an area where there are far more people interested in public school than private school. The area where School 6 is located has higher private school enrollment than any other state in the country.

For School 5, the anticipated changes for the future include launching a feasibility study and, hopefully, a capital campaign to construct a school building that will accommodate the entire school (within three to five years). Also, School 5 lost four key staff members (Director of Operations, Science program coordinator, math department coordinator, and Dean of Students) at the end of the 2021-2022 year, which impacts student culture and changes the way School 5 covers operations tasks. School 5 is idiosyncratic in that it is an open-admission school while the others are discipleship model schools. School 5 is also explicitly Reformed in its Statement of Faith and catechism, which is unique among the six case study schools.

School 5 has a well-developed leadership team. The leadership includes representatives from the four quadrants of the ISM B-Ring circle: academics (teaching and learning), student life (teaching and learning), operations (finance and operations), and development (Marketing and admissions/ fundraising and facilities). According to the pre-visit questionnaire, "we have a very collaborative working relationship and follow the model outlined in Patrick Lencioni's book *The Advantage*." The positions on the leadership team include:

1. Headmaster—total oversight of all aspects of the school

2. Principal—oversight of all academic instruction and curriculum (teachers, curriculum, grades, etc.)

3. Assistant Principal—oversight of Lower School environment in conversation with Principal

4. Director of Operations—oversight of all non-teaching staff and processes

5. Dean of Students—oversight of all non-academic student activities

School 5 also has a business manager and admissions coordinator that report directly to the headmaster but do not regularly meet with the leadership team. School 5 has a developed leadership infrastructure but less intricate structure than School 6. While Schools 4-6 in this study had leadership teams at the time of the focus group, Schools 1-3 did not. For School 5, it is interesting to note that the one-sentence job descriptions above are defined by oversight, not insight of foresight. As shown in the subsequent sections, this might be a subtle sign of an overemphasis on administrative, resulting in slight organizational aging.

School 5's strategic plan is provided by the board and addresses five areas of the school: academics, student life, growth, finances, and facility. The plan identifies the objective, goals, strategies, and measures for each area. Of all the schools that participated in this research, School 5 was definitely the most engaged in the focus group and thoughtful in their lifecycle diagnosis of the school. They were also detailed in the sort of potential improvement points they were generating.

Teaching and Learning (Producer). School 5 is a K-12 with teachers in upper and lower school spread across two campuses. The potential improvement points for this category include:

1. Difficulty finding qualified staff and teachers who want to live in and around the area

2. The middle school math sequence needs updated.

3. Student life: Unknown but serious personal issues that male and female students are facing but remain hidden

This researcher had an opportunity to observe students during upper school chapel where they joyfully recited the catechism questions and heartily sang the hymns in melody. The brief service was well-organized, sincere, and joyful among the adults and children. With the amount of veteran academic leaders and teachers involved in the school, it was not surprising to see so few problems in teaching and learning. As one of the potential improvement points showed (with regard to hidden issues for students), not everything a

132

researcher sees on the surface is what is happening on the inside. With regard to that particular problem concerning hidden issues, there was not any discussion, so it is difficult to know the degree to which that perspective is true of the broader student body. Additionally, School 5 struggles to recruit and retain qualified talent for their openings similar to the other two ACCS West region schools in this study. All three schools point to the cost of living and political climate as reasons for the exodus from their respective locations.

Within School 5 is a culture of professional development. The headmaster and principal are members of Society for Classical Learning cohorts and bring ideas back to faculty as appropriate. School 4's board chairman and head of school also participate in these cohorts. Also, the school is sending principals and three teachers to summer Society for Classical Learning conference, and three teachers to summer Association of Classical and Christian Schools conference. This shows that the veterans at the school have not entered into mental aging and are still eager to learn and improve their craft. It is worth noting that the board of trustees was not mentioned as sending anyone to the conference or participating in a professional development cohort for board members. Additionally, it shows E within the academic leadership of the school in that they are engaged beyond the walls of the school, seeking out the best ideas to bring inside the walls of the school.

For a time, the recruiting and hiring component of teaching and learning at School 5 will be in Go-Go, which has a focus on P. This is due to the four vacancies the administration must fill in the short-term. These sorts of leadership role changes could have a significant impact on the school if they are too early in the school lifecycle where each aspect of the school is person dependent. One aspect of School 5 that helps them not be so person dependent is that they are ACCS-Accredited, which simply means they have developed a way of operating every area of the school. School 5 seemed far less person dependent than School 2 and School 3 who are both younger K-8 schools with younger headmasters.

During the lifecycle diagnosis portion of the focus group, the following comments were illuminating as it relates to the producer function of teaching and learning:

1. Early Prime in some areas, late adolescence in the following maturing areas: faculty development & support, family enculturation, student life, and academic options

2. Early prime: leadership has clear vision, we are hiring teachers that are humble, hungry, and smart in classical Christian education, our 22-23 freshmen class is the biggest yet, we are more connected in the Classical Christian movement

3. Student Support- Teacher Support program is in its infancy and could be enhanced/fine-tuned

One insight that emerged from doing the focus groups was that the various subsystems of the school are at different stages of the school lifecycle. However, the focus group only asked participants to diagnose the school's overall lifecycle stage and provide a descriptive rationale. The aforementioned participant-generated lifecycle diagnoses shows that the student support program is still in its Infancy whereas faculty development and student life seem to be in early Prime. This researcher did not observe any of classes at School 5 or School 1; however, School 5 felt much more seasoned, or experienced, than Schools 1-3. A level of maturity existed in the K-12 schools in this study, schools 4-6, that was not yet evident at schools 1-3. That being said, the most obvious reason that School 5 is in late Adolescence and not early Prime is due to the fact that the school has not been giving birth to any new programs. It has been improving operationally, but has under-developed programs for student life, has no programs to support students with learning differences, and has no ambitions to pursue ACCS Cathedral Accreditation. The attitude of this school leader was much more settled than the striving mindset of School 6's leader.

Marketing and Admissions. Despite a minor reduction in enrollment during Covid, the school has grown overall in enrollment over the past five years. The school is pretty close to full enrollment capacity for its current facilities arrangement. A few problems were mentioned in this area during the focus group

1. Ambiguous key terms across school community (classical, Christian, school); we use different definitions and lack a common language

2. Only 20% of the parents understand the why of the school and many are here for the wrong thing.

3. Low retention- We struggle to retain upper school students. (20th 9th graders enrolled 22-23) and 81% retention

4. Conflicting goals within SSA (affordable vs sustainable, nondenominational vs reformed, small classes vs programs)

5. Evangelistic Model with discipleship desired outcomes and Reformed catechism

This data pertaining to messaging, communication, and internal marketing was interesting in light of a comment on the pre-visit questionnaire from the headmaster:

> Honestly, I don't see the school's role as parent educator, and I think many schools waste a lot of time and energy trying to educate parents for very little pay-off. Parents choose to pay for classical Christian education for lots of different reasons, some of them incomprehensible to us. Our job is to help them educate their children consistently with what we say we do, and our expectation is that the effects of what we do in the life of their child will either increase buy-in or help them see that they really want something else.

There definitely seems to be room for improvement when it comes to upper school retention. It also appears that School 5 has established itself as a school that can, overall, attract and retain students. School 5 has defined processes and is getting above-average results with regard to enrollment. The school is not necessarily the bargain school for the area, but School 5 also lacks meaningful programs in athletics and arts, which hinders its overall value proposition to the local market. School 5 is in its later Adolescence with regard to marketing and admissions. One comment characterizes School 5's lifecyle stage when it comes to marketing and admissions: "We are not fully predictable yet."

One interesting aspect of School 5 is that they have less than 300 students yet have more than 500,000 people within ten miles and a family median income over $80,000. Adizes teaches that the senior leadership must synchronize the school's mission with the market's needs and the amount of money they are willing to pay for those needs. School 6 has about half of the general population within ten miles that School 5 has yet the enrollment School 6 is almost double of School 5. This discrepancy could be due to any of the following factors: School 5's headmaster is much newer to the role, School 5 is spread across two campuses, School 5 speaks less about college preparation which might

be a value for prospective parents, School 5 has fewer athletics and arts programs, School 5 has different political climates impacting Christian schooling, and School 5 is Reformed doctrinally yet has open admission. School 5's state also ranks 28th in total private school enrollment compared to School 1's state who ranks first. Total enrollment could also be impacted by driving distances and the two locations of School 5.

Finance and Operations (Administration). After thirteen years, the Director of Operations is moving on from her role. Interestingly, this individual's PAEI code as pA-I, so it will be interesting to see how School 5 manages the transition. It appears that School 5 is mostly past the stage of being person dependent in this area. School 5 listed the following four potential improvement points with regard to Finance and Operations:

1. Refine Lower School support systems for teachers and students.

2. Lack sufficient training for volunteers (recess duty, reading groups)

3. Lack of funds to cover the costs to operate and grow needed staff

4. People are stretched thin due to limited program support staff. Business person has to teach math also because there is not enough money for roles

School 6 has a strong administrative culture based upon the detailed nature of some of its policies. For example, the pre-visit questionnaire described the tuition assistance policy:

> Tuition assistance is need-based only. Incoming and returning families are informed of the availability of need-based tuition assistance and can apply for aid by submitting household size, income, and tax return to the business office. We calculate the tuition discount based on 115% of the MIT Living Wage Calculator for Washington County, Oregon for a given household size. See attached schedule.

There are a number of evidences of thoughtful planning, careful systems, and organized processes. With regard to finances, the school is now covering 99 percent of its expenses with tuition revenue. The school's budget for 2022-2023 is projected at $2,363,000. During the lifecycle diagnosis stage of the focus group, a few index cards stood out as it pertains to finance and operations:

1. Adolescent Stage: already moved past founder handoff

2. Late adolescent: the board and admin have gone through major leadership changes, authority has been/is being decentralized (Principal, dean), the school is

professionally managed, but we don't have the balance of control & flexibility that characterize prime

3. Adolescent: working toward staving off early adulthood, authority not fully decentralized, not fully predictable yet

4. Mid-late adolescence: Rebirth was when current head of school came and brought school into adolescence through more well-defined admin roles and new board accountability structure

5. Late adolescence: mature processes in place and are accredited, still need to more deeply establish ourselves in the local community

It is clear that School 5 has passed through the Founder's Dilemma. In fact, the board chairman said during the focus group, "I lived the founder's dilemma with the previous head of school; it was just as tumultuous as Adizes described!" In the area of Finance and Operations, this places the school in either Adolescence or Prime on the growth side of the curve. However, this researcher does see some characteristics of aging based upon the previous director of operations who had an e dash in her management code. She also served on the school's senior leadership team and had a team of direct reports. This means that the director of operations did not account for how her operational decisions fit with the strategic plan, impacted the local Oregon community, and advanced the school toward its long-term initiatives. This could have something to do with the low market penetration of School 5. For a school more than two decades old, it was interesting to observe some of the items that have not yet been prioritized. This becomes particularly clear when School 5 is compared with School 6.

In a conversation with the head of the school, he remarked, "The head of school before me would have three-hour meetings with people; he would try to pastor the parents and every issue was case by case. We had no processes or systems when I started." It is possible that the current head of school has effectively injected A into the school because it is what was needed during his first four years. It seems like the next step is to better inject E into the various domains of the school related to fundraising, marketing, and enrollment. The 'E' must be injected via the leadership team.

Based upon the fact that each of the administrators on School 5's senior leadership team are also teaching, it could be true that the school is what Vern Harnish calls a "death valley." Death valleys are the spots in the organizational lifecycle between the peaks of growth—these would be points in the school's lifecycle where it does not have quite enough revenue to make the needed hires. Interestingly, the school has a high hard income cash coverage but might actually benefit from lowering it to add roles and increase the culture of philanthropy.

One aspect of School 5 that was never mentioned was human resources development. While there is a strong culture of professional development within the academic administration, it is not clear how the head of school is using his Integrator strength to cultivate the operational staff. The leaders are readers on management and leadership so it is clear that there is an awareness of the need for organizational health. The researcher wonders if core virtues have been identified, articulated, and operationalized. While structure and responsibilities and oversight are A solutions, inspiration, story, and core virtues are I solutions. This is not like the situation at School 4 where the board functions like an emergency brake on the school; at School 5, it is more like they are driving in the rain and only one of the windshield wipers is working.

Fundraising and Facilities (Entrepreneur). School 5 leases Upper School classroom space from a church that is far from the center of the school population, which could be one factor attributing to the eighth grade exodus. The church has not been predictable, but they have agreed to renew the lease each year (for one more year) for the past seven years. This is the same scenario that School 3 faced for their first fourteen years leasing from a church. The location of the Upper School campus and the layout of the Lower School campus are not conducive to community building as part of the regular school week. Any attempts to build community have to be created outside the school day (events, social gatherings, etc.). The school community feels the need for a permanent facility that allows School 5 to pursue its classical Christian mission. The cost of real

138

estate in the area is also prohibitive. The main potential improvement points shared in this area were:

1. We lack resources for single campus and higher teacher compensation

2. We need more creative and robust fundraising

The high A, low E, board structure might have something to do with these issues pertaining to fundraising and facilities. School 5 uses the Carver Board Governance model where the board governs the school through policy, the administrative management style. Board policy directs the board's sole employee, the headmaster, by providing ends statements (results to be achieved) and limitations (conditions to be avoided) and views headmaster performance as equivalent to organizational performance. The board has no contact with administration except through the headmaster. Foundational Carver Governance principles include the board's obligation to state expectations in policy and the CEO's freedom to use any reasonable interpretation of policy in the pursuit of results.

School 5 uses a well-defined board policy manual. This researcher had the opportunity to observe a board meeting and the following observations rose to the top:

1. The members have all been around the school for a long period of time and are very committed to the school as evidenced by their preparation for the meeting. It felt like a church elders meeting based upon the care and commitment of the trustees present. Moreover, it seemed like an elders meeting in that there was strong theological alignment. They were crafting ends statements for the graduates and their love for the kids was obvious. Additionally, the board discussed classical Christian books that they were reading together and spoke with great passion for classical method.

2. The headmaster of the school shared a lot of administrative details with the school pertaining to personnel decisions, individual family enrollment, and lengthy discussion about the quality of the different senior thesis presentations from that year. There was lots of discussion about the previous month, or the next month, but very little discussion about the next few years. Evidence of the 'E' function that sees through the fog was largely absent from the meeting this particular researcher attended. The meeting was procedural yet relational; there were no rabbit trails and everybody had opportunities to contribute. Each individual was disciplined in how long they spoke.

3. Instead of a whole-board meeting, it felt like a committee meeting based upon the detailed discussion of various agenda items. Although the meeting was orderly and disciplined, the topics were administratively-oriented rather than governance level. Nothing was mentioned regarding a capital campaign or a feasibility study. There was also no discussion about taking steps towards further penetrating the local market of mission-fit families.

139

Overall, the highly administrative board meeting and the lack of strategic fundraising plans lead toward the conclusion that the school has entered into early aging in this area. Although there is an awareness of the risks and threats within the local environment, there did not seem to be an awareness of potential opportunities to be tapped in the local community. The school raises between $200,000 and $400,000 per year for its annual fund and has been considering doing a fundraising feasibility study for a facilities capital campaign. This was the one entrepreneurial evidence in the area of fundraising and facilities.

In comparing School 5 and School 6's fundraising website pages, it is clear that School 5 is more oriented to the present with fundraising whereas School 6 is more oriented to the future. School 5 has detailed descriptions of how the annual operational funding model works, whereas School 6 gives a vision for how to make legacy and estate gifts to the school. On School 5's website, there seems to be a bent toward event-based fundraising which is far less effective than major donor cultivation.[18] The reason major donor cultivation is important is that it prepares individuals for giving bigger gifts during a capital campaign. Because School 5 has not pressed into this adequately, they are delaying the time that a facilities purchase could be possible.

With regard to fundraising and facilities, the board and executive leadership have allowed the discipline of oversight of the mission to crowd out the importance of foresight toward expanding the mission. It appears that it is either the structure or the processes that come from the Carver governance model that is causing the aging; it does not appear to be a cultural problem. It is impossible to make a good apple pie with a bad recipe and semi-functioning oven. It seems like School 5 has good apples (healthy culture) but could stand to adjust their governance oven and recipe (the process and structure). When it comes to fundraising and facilities, School 5 is in late Adolescence with subtle signs of aging.

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[18] This is an ISM Stability Marker.

Table 12. School 5 (West) case summary

Category	Lifecycle Characteristics (Stage) & Leadership Contributions (PAEI)
Teaching and Learning (P)	few athletics and arts and few new programs, oversight is greater than foresight, strong professional development, ACCS-accredited K-12, losing key leadership positions, low market penetration, <u>late adolescence</u>
Marketing and Admissions (I)	Could improve internal marketing, needs more athletics and arts, affected by facilities, has mature website, 8th grade exodus, not yet fully predictable, not established in local community, <u>Late adolescence</u>
Finance and Operations (A)	Head of school over-corrected predecessor potentially, someone with (pA-i) was on leadership team, high hard income cash coverage, passed founder's dilemma, <u>Late adolescence with subtle aging</u>
Fundraising and Facilities (E)	The board structure predestines PA rather than EI, healthy culture on board, no capital campaign ever, split campus makes growth difficult, fundraising function is weak to moderate and no development director, <u>Late adolescence with subtle aging</u>
Overall Lifecycle Stage: age=22, The school is late adolescence with a few areas of aging that need to be addressed. There seems to be too much of an emphasis on A in senior administrative leadership which impacts the school's ability to fully establish itself in the local community and increase its market penetration. Also, the school has a Carver Model board which is obscuring the board and head's foresight into the future because the Carver structure and process prioritizes oversight. The issue with Carver is that ambiguity and risk are avoided; the ISM Governance model on the other hand strikes a better balance between PA and EI whereas Carver seems to focus primarily on PA which prioritizes organizational control, not flexibility.	

School 6

In the 2021-2022 school year, School 6 was in its 21st year serving students. The founding husband and wife took two years to develop a plan for School 6 and they opened its doors in September 2001 with 28 students K-2nd grade. In 2021-2022, this PK-12 classical Christian school in the West region of the ACCS had 515 students enrolled. In the 2018-2019 school year, School 6 purchased its current home, nine acres and the current building where the school resides. Based upon the pre-visit questionnaire, one focus area over the next three years is to develop a master plan for the overall next steps and development of the current property based on student needs. School 6 also plans to open preschool and expand to two TK classes.

School 6's state has both the highest population as well as the highest private school enrollment in the United States. In this school's market, having a preschool

program is considered a strategic entry point because parents typically do not take their school decision year-by-year. Thus, once a child is enrolled in preschool, they are likely to stay at the school for the long haul. Without a preschool program, the school misses out on enrolling families that choose the competition who did have a preschool. The average tenure of the individuals who participated in the focus group was over ten years, so each individual had much higher levels of competency in their roles than those of the other schools.

School 6's location is within ten miles of 271,661 people and the family median income is $99,666. The school's highest tuition price for the 2022-2023 school year is $19,075. Of the six cases in this research, School 6 has the highest enrollment by more than 200 students, and the highest tuition by almost $10,000, yet does not have the highest family median income or the highest general population within ten miles. Additionally, School 6 is the only school where the founder is still the headmaster of the school. Three environmental factors are important to consider when diagnosing the lifecyle stage of School 6. First, the values of School 6's state and the local public schools are in stark contrast of those values and commitments within classical Christian schools like School 6. Second, School 6 has more than one hundred full-time employees due to their fully developed athletics, and arts, and support programs. Third, School 6 has not positioned itself as the bargain option in their particular market like the other five case study schools have. Understanding these environmental factors goes beyond the bounds of this study's research questions—this research seeks to account for the context to a degree but the focus is on the PAEI leadership causes of organizational growth throughout the lifecycle rather than the environmental factors which impact enrollment and tuition. Therefore, it is necessary to examine the potential improvement points revealed during the focus group.

Teaching and Learning (Producer). School 6 has a developed structure for academic leadership through a Grammar School Principal, an Upper School Principal, an Upper School Dean, a Curriculum Director/Reading Support Specialist, and a Dean of

Classical Christian education that supports faculty training and development function. Each of the grade-level domains of the school is managed by qualified academic leadership. Moreover, each of the leaders has been at the school for more than ten years and has grown along with the school in its stages of development through the lifecycle. The school is accredited by Western Association of Schools and Colleges (WASC) and uses Advanced Placement courses as well as Dual Credit that graduates apply to colleges and universities in state and around the country.

The researcher did not have the opportunity to observe the classrooms but observed the lower school students line up in the hallway for lower school catechism. The Grammar School Principal read a question from the a catechism over the school intercom and the students recited the answer to the question in unison. After the catechism, the principal prayed for the school day and students began their day. Like the other schools in this research, the students exuded a sense of joyful order as they recited their catechism in their school uniforms.

During the focus group, participants only shared two potential improvement points related to teaching and learning.

1. There is a needed to expand the ways in which we recruit and retain the best faculty members.

2. There is a lack of continuity between Upper School and Lower School.

The first of these problems makes sense due to the large number of people leaving their state due to the values that are inconsistent with Christianity as well as the high cost of living. The second problem, discontinuity between upper and lower school, could be attributed to large number of students and the number of new employees who are still learning the culture of School 6. Lower School is older in that it has served grades K-2 for more than two decades but has only been graduating students for approximately two decades. In other words, it has more time to develop and establish an identity whereas the Upper School has developed a number of new programs that are still settling in with the overall school culture.

The majority of participants in the focus group diagnosed School 6 as early Prime. One participant wrote on her index card, "The School is in early Prime. We have a clear purpose. We are predictable. We know the areas we need to grow and are taking the right steps. At times, it seems that we are in Adolescence, because each department is still needing more flexibility. Grammar School is different than Upper School." When it comes to teaching and learning, there are three evidences of early Prime. First, the school habitually gives birth to new academic programs that are successful, including a program for students with learning challenges, a cooperative program for homeschooling families, a new preschool program, and even hosts a regional conference for other classical Christian schools. Second, School 6 has a strong relationship with a local classical Christian university that regularly supplies the school with qualified faculty and coaches. Having visited the school on one separate occasion, it is clear that the leadership of the school is strong in the vitamin of Entrepreneurial management yet still has mature administrative infrastructure and policies. In other words, there is both flexibility for change and control to effectively implement the need changes, which is the Adizes description of Prime.

It is worth noting here that one shortcoming of the Adizes methodology is that it purports to diagnose lifecycle without reference to values. Adizes believes that management is a process, which is why the methodology has applications in every industry, no matter the culture or the size of the organization—he is agnostic to the content. In this study, the researcher did not spend time observing classes to see the quality of the classical Christian education being delivered to the students nor did focus group participants share specific problems related to teaching and learning. This researcher did observe that the school's marketing materials and the head of school still speak about classical in the way discussed in the early 2000s; this is the Sayers-only Trivium approach to presenting classical education. Additionally, the school is not accredited by the Associated of Classical and Christian Schools but is instead accredited by the WASC. In the school's marketing materials is an emphasis on Advanced Placement (AP)/Dual Credit courses. In the Upper

School curriculum, AP Literature and Rhetoric are presented as the same course. This is difficult for this researcher to imagine given the divergent goals, methodologies, and resources prioritized by the College Board who creates and oversees AP Literature. This is only conjecture, but it seems that WASC Accreditation could potentially undermine School 6's classical and Christian distinctives even if it does enable the school to save parents money in their transition to their state's college and university system.

Overall, with the aforementioned caveats in place, it does seem like the Teaching and Learning, or the Producer function of the school, is in early Prime. School 6 is in early Prime instead of late Prime because it is marked more by its flexibility than its control, yet both are very present. The head of school teaches a class to seniors, is paEI (the statesman), and has an energetic and enthusiastic character to her leadership. In this researcher's interactions with the head of school, she was constantly acknowledging, shaking hands, and encouraging students, parents, and faculty that walked by during conversation. While it does seem that she might have too many direct reports and some of her "E" needs to be better institutionalized, it does not appear that there is a founder's trap in this area based upon the presence of other qualified leaders who could take the reigns.

Marketing and Admissions. The current focus for School 6 is enrollment. While the school was the largest in this particular study at 515 students, its total capacity is 650 students. School 6 has empty seats in every grade. The pre-visit questionnaire records, "Strategically we are upgrading our digital marketing and communications. We are making a huge investment in seeking an outside entity to develop an email and marketing campaign." On the surface, this seems like an Administrative technological solution to the enrollment capacity problem.

As already mentioned, School 6 has not positioned itself as the bargain school. The pre-visit questionnaire records the following for their competitive advantages: "That we are Christian and classical. We offer supplemental services and a range of programs for the low to high learner. We offer tuition scholarship. We have a very developed dual credit

program along with an AP program. We have fully developed sports and fine arts programs." School 6 has definitely proven itself to be a viable player in the independent school market in their area. However, School 6 also must deal with the unfriendly political climate as well as the ongoing increase in the expense of living. School 6 has acknowledged that Christians are leaving the state in increasing measure, and the school has responded with intentional investment in digital marketing to attract mission-aligned families. This shows an entrepreneurial awareness in the world outside the walls of the school. School 6 is vulnerable to taking in new families and faculty that are not a good fit for the distinctively classical and Christian commitment. The reason for this vulnerability is that the school's demand for filling empty seats might be higher than its area's ability to supply that demand with mission-fit people. If there is a need for the school to add people, then there is an even greater need to ensure that the people added are on the same mission.

The focus group did reveal a few potential improvement points in this area:

1. We have not developed a unifying vision of being classical and Christian

2. We need to improve church attendance of families and faculty

These were one-offs so it is difficult to know the degree to which these points impact the school. They also fit with the mission drift concern expressed in the previous paragraph. The most difficult part of analyzing School 6 is the lack of contribution to the focus group of process compared to the other schools. Perhaps there was a hesitance for those in this state to share sensitive internal information with an outside researcher due to the hostile political climate for Christians. Moreover, of all the teams, this group of people had spent the most time together.

The founding head of school is still leading the school. The lack of contribution could be due to a small degree of the founder's dilemma where participants do not want to share seemingly negative information about the school in front of the person who has given two decades of her life to build the school. There is definitely some degree of merit to this in that the head of school positively reframed each of her potential improvement

points by clarifying her enthusiasm about the progress they had already made. However, there is more evidence that decentralization has happened structurally and that the founding head of school empowers others to lead.

Overall, it seems like the marketing and admissions are in early Prime. There are several sophisticated examples of internal and external marketing processes as well as incredibly well-crafted magazines and messages in printed and digital form. The events calendar as well as the messaging is one of the best that this researcher has seen. All the content points back to the school's classical and Christian mission. Additionally, the fact that the school was aware of the need to make an internal change given the external dynamics in the region shows its maturity in marketing and admissions. School 6 has continued to build programs, develop processes, and hire and empower new leaders.

Finance and Operations (Administration). School 6 has a well-developed leadership team with nine different roles that report to the head of school:

1. Chief Operating Officer—oversees the facility, IT, summer programs, health and security, the Director of Fine Arts, and the homeschool cooperative program

2. Director of Finance—oversees the accounting associate and administrative accounts coordinator

3. Managing Director—spouse of the head of school who oversees social media and the speaker series

4. Director of Development—oversees fundraising

5. Director of Human Resources—oversees employee onboarding, contracts, and payroll

6. Director of Admissions—oversees communication coordination, website, and the entire admissions funnel

7. Principal of Special Education

8. Principal of Grammar School

Three of the nine leadership roles are in academics and the other fall under finance and admissions. In other words, six of the nine leadership roles are operational administrators instead of academic administrators. Having well-developed leadership is crucial when there are more than 100 total employees and more than 500 students. One

item that is evident at School 6 is Integrative management—the school has spelled out its core values, has them displayed throughout the school, and there is a deep sense of time-tested loyalty to one another. In fact, it appeared to this researcher that there was not a strong desire to share potential improvement points with an outsider researcher. They did not want to speak poorly about the school in front of one another because of how hard each person was working. One participant in the focus group said, "Even our problems are areas where we are working hard and improving." The group was extremely positive about the school but obviously quite busy as well. This organizational chart also shows that there is A present in the management of the school and that these are in a healthy balance.

Although it was a minority comment during the lifecycle diagnosis, one individual said, "GoGo- definitely a feeling of everything is a priority; we have confusion in roles & responsibilities; not adolescence; don't see a reborn (not positive or negative), trying to change from entrepreneurial to professional management right now." This researcher believes that the lifecycle diagnosis is based upon how many new programs have developed over the previous three years. Even the appearance of the school feels a bit Go-Go. For example, the art class is in an old kitchen (the building was previously a church) and the Chief Operating Officer's office is in a closet. This researcher has visited a similarly-aged classical Christian school with 622 students in the Northeast ACCS region and the offices and the pace and the campus felt much different. Despite having 100 more students than School 6, the school has 20 less employees. It appears that launching the special needs school, summer camps, many events, athletics teams, and arts programs with such a rapid pace gives a feel of Go-Go to at least one participant. Some of the programs with the operational side of the school are newer than others. For example, Human Resources is more in its infancy whereas the events planning and management have been going on for decades and are much closer to Prime. Overall, the school continues making new hires and improving the effectiveness and efficiency of the school, which seems to indicate the fertility and potency of the institution, a mark of Prime.

148

The only potential improvement point in this area was that the school needs to find a way to keep tuition affordable in the long run. When the school acquired its campus through a $16 million dollar bond issuance three years ago, it did so without a capital campaign. The tuition at School 6 is almost double any of the other five schools in this study and is even $5,000 higher than the comparable school in the ACCS Northeast region. This is due to three factors: the school has more specialized employees, there is a higher cost of living at School 6, and School 6 did not do a capital campaign. According to the pre-visit questionnaire, the cost per student in 2021-2022 for School 6 was $17,256. The school pays for 95 percent of its expenses through tuition revenue. These numbers might seem high but the cost of living in School 6's state is significantly higher than the rest of the country. Although some tweaks likely could be done to the financial model of the school, the school has mature structures and policies that keep it sustainable while owning its own campus. For this reason, the school seems to be in early Prime or late Go-Go when it comes to Finance and Operations. It might be wise to pause adding new programs for a year or two to allow the school to internally develop to compensate for all of the external growth. There is a distinction between growth and development; growth is adding from the outside whereas development is building capabilities on the inside. These two areas of increase must be held in balance.

Fundraising and Facilities (Entrepreneur). When it comes to fundraising and facilities at School 6, three important facts from the pre-visit questionnaire relate to potential improvement points share by focus group participants. First, School 6's board is organized to empower the head of school and her administration:

> The School board, it's self- perpetuating, smaller by design. They have one employee and that is the head of school. They meet quarterly for regular business meetings and check-ins. Those are 2 1/2 hour meetings. We do twice yearly board retreats for strategic talk and planning. The board does not get involved in day-to-day operations or decisions. They see themselves as having a fudiciary responsibility to help the school move forward strategically. They serve as an advisory to the head of school.

Second, the school is developing a master plan for the building that they purchased three years ago. The school was purchased using a $16 million bond issuance with no public campaign; a few hundred thousand dollars were raised for the down payment. Third, the school raises between $400,00-$500,000 per year.

While high "E" might be the biggest strength of the whole school, the biggest weakness of the school might be their total fundraising efforts. To this researcher's knowledge, no capital campaign has been done in the school's more than two decades of history. Applying "E" to finances and fundraising will help the school move forward to Prime in all areas of the school. The main potential improvement points for this area were:

1. The school has no endowment

2. Not enough value on professional aesthetics

3. Master plan implementation incomplete

4. Need to finish master plan for facilities

5. Facilities need to be expanded

It is interesting to hear that the school purchased a building without having a master plan for that campus. This appears to be another example of Early Prime or even Late Adolescence because there was an entrepreneurial spirit to take risks and see through the fog but not a well-detailed Administrative plan. The lack of a master campus plan could be an indicator of a lack of "A" in the area of strategic planning. One participant in the focus group mentioned that School 6's "strategic planning appeared to be in its infancy."

The school does have a development director, but it is not clear whether the individual is focused on major donor cultivation toward capital campaign or merely running the school's annual fund. The school has high "A" present in the fundraising aspect of the school as evidenced by its website, which provides options for planned giving, estate bequests, and other sophisticated giving platforms. To successfully navigate a capital campaign, there must be high levels of "I" present between the school's top leadership and the major benefactors of the school.

Table 13. School 6 (West) case summary

Category	Lifecycle Characteristics (Stage) & Leadership Contributions (PAEI)
Teaching and Learning (P)	Birthing new programs (Imago Dei, Libertas, PK, athletics & arts), head of school teaches seniors and is a paEI statesman leader, no founders trap, <u>Early prime</u>
Marketing and Admissions (I)	mission-drift concerns due to supply-demand mismatch, sophisticated materials, doing digital marketing, <u>Early Prime</u>
Finance and Operations (A)	Due to all of the new programs that need organized, there seems to be a feeling of GoGo. Also, the programs have all successfully integrated so there's evidence of predictability—School #6 is in a competitive area where there's lot of change to keep up. <u>GoGo or Early Prime</u>
Fundraising and Facilities (E)	Weakest area, strategic planning in infancy, needs master plan, no capital campaigns, does have a development director and solid website, where's big gifts? <u>Adolescence</u>
Overall Lifecycle Stage: School #6, as it enters year twenty-two is in early Prime with strong leadership in all areas of the school. The one question mark is why School #6 has not done a multi-year multi-million dollar capital campaign before. This fundraising and facilities area of the school appears to be in adolescence compared to the other areas of the school. The school needs a feasibility study for major donors.	

Evaluation of Research Design

Previous sections of this research already mentioned the delimitations and recommendations for further research. As far as the intentionally measurement boundaries, the generalizability-limiting factors are the ACCS-only school sample and the lack of a case school to fall between the age 2-13 who is in the process of adding grades 9-12. As for the recommendations for further research, the main was to include more steps in the Adizes methodology, not just the organizational diagnosis. Further research could reduce the number of schools and really measure the impact of going through the Adizes methodology. This particular research had a limited time window of working with each of the six schools.

The strengths of the current research design are fourfold. First, the multiple case study methodology was essential for doing cross-case analysis. Having six schools was a manageable yet meaningful number for doing both the cross-case analysis and the within-case analysis. Second, a fourfold diversity of schools are represented in the study. Within the six schools, there were both PK-8 schools as well as K-12 schools. There was a startup

school, but there were also schools with more than two decades in operation. There was church school, and the others were independent schools. Additionally, there were both suburban and rural schools within the sample. Third, the biggest strength of this research was that it was based upon a qualitative focus group with a collaborative group of constituencies from the school. This aspect of the research design was far superior to the use of surveys in that it allowed for an authentic assessment of the school's stage in the lifecyle using the Adizes language. This Adizes research would not have been possible without the focus group methodology. The fourth strength of this research design was the School Problem grid used to code the school problems. The School Problem grid was a synthesis of the Adizes methodology, the ISM Stability Markers, and the ACCS Accreditation Standards. The grid enabled the researcher to efficiently code and organize the six school's worth of potential improvement point data in a manageable fashion.

The weaknesses of this research design are twofold. First, a number of contextual factors appeared to impact the research. For example, all three schools in the ACCS West region mentioned the impact of a hostile political climate on their schools. Each of them mentioned the difficulty in recruiting and retaining faculty due to cost of living increases and the unfriendly climate for Christians. This research did not include any quantitative aspect to account for these environmental factors. Additionally, the research was conducted during COVID-19, which likely had an impact that was not quantitatively measured. Second, the focus group time together was quite full. Usually, an Adizes associate would bring together a management team for two or three days to conduct an organizational diagnosis, but this was not possible for the researcher or the schools during the Spring of 2022. Further research could reduce the number of case study schools and do a multi-day series of focus groups with participants.

CHAPTER 5

CONCLUSIONS

The purpose of this qualitative multiple case study research is to understand leadership throughout the growth process of classical Christian institutions affiliated with the ACCS. Using a multiple case-study methodology, this research analyzed school leadership and school growth by examining a sample of six schools positioned at different stages of the organizational lifecycle. Because different leadership styles are required at different stages (e.g., Infancy compared to Prime), a school perceived to be at each of the growth stages was included for within-case and cross-case analysis with the aim of describing leadership throughout the school growth process. This research employed a multiple case study methodology to understand the process of the leadership contributions to school growth over time. The following chapter presents the researcher's final conclusions based upon a comprehensive analysis of the data from the six case study schools.

The final conclusion of this research is a taxonomy of school growth entitled School Leadership in the Lifecycle. The taxonomy is a visual tool used to classify a school's stage in the school lifecycle and to describe the leadership actions that enable the school to cross the barrier into the next lifecycle stage. Within the school growth taxonomy are three levels, or stages. Additionally, the taxonomy is organized into the four categories that emerged during the data analysis: teaching and learning, marketing and admissions, finance and operations, and fundraising and facilities. One major insight that emerged after doing the lifecycle auto diagnosis with six different schools was that different areas of the school are in different lifecycle stages, yet the subsystem specific maturity and health affects the whole school. In the same way that a dying liver or infected toenail affects the

whole body, a marketing and admission function with arrested development will negatively impact operations and finances as well as fundraising and facilities. Figure 5 is designed to get schools on the optimal path where the four subsystems can develop synchronously and evenly rather than sequentially and haphazardly.[1]
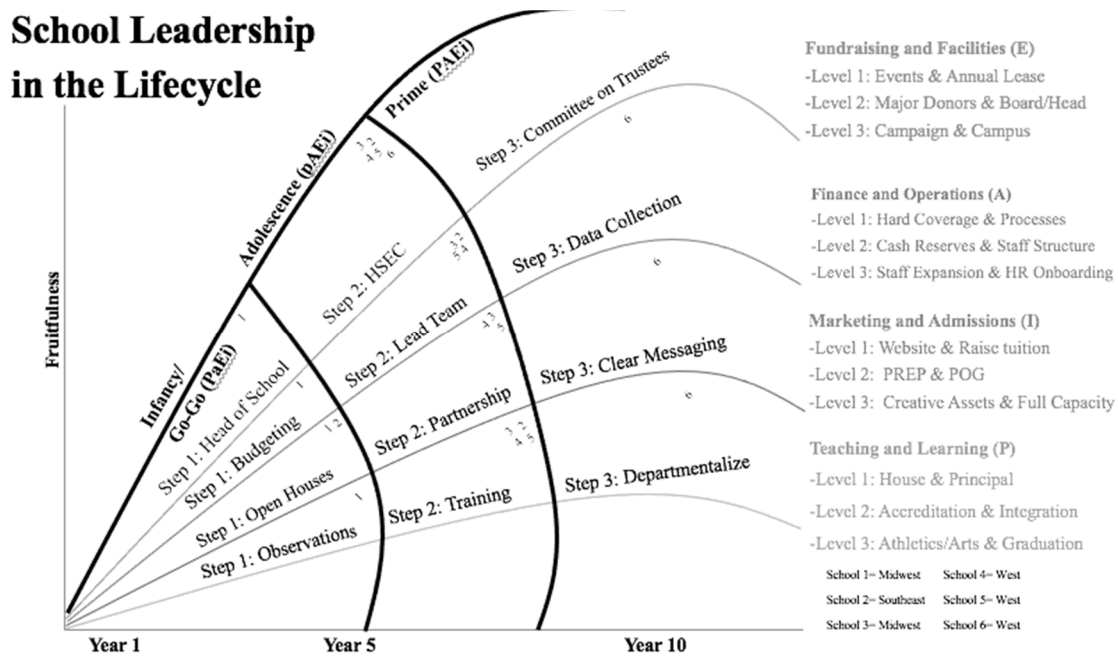

Figure 5. School leadership in the lifecycle

The School Leadership in the Lifecycle taxonomy is both diagnostic and therapeutic. Additionally, it answers research questions concerning the characteristics of the various lifecycle stages as well as the corresponding PAEI leadership behaviors that create those stages. The five main features of this tool are included:

1. The Y-axis: based upon the research done in the literature review, the term fruitfulness was used on the Y-axis instead of external success metrics (enrollment, endowment, campus) or faithfulness alone (love, joy, peace). To reach Prime, the school must

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[1] Potential improvement points, or problems, emerge due to disintegration. When the admission function's institutional incentives for expanded enrollment undermine the teaching and learning function of the school, this creates problems for the whole school. A fragmented school will not be aware of the goals of other departments. Management's job is to correctly identify what is falling apart and choose the right PAEI tool to put it back together to get the school back on the journey toward Prime.

predictably produce the results that align with the school's classical and Christian commitments.

2. The X-axis: although Adizes asserts that lifecycle stage is not determined by age, it is clearly impacted by age. Classical Christian schools are in a relatively slow-growth industry because the speed of change is bound by the school year. Because the classical Christian schooling movement is relatively young, estimates of the length of each stage of the lifecycle are displayed. This researcher projects that it would take a school on the optimal path five years to make it through Go-Go and into Adolescence and then another five years to make it through Adolescence into Prime.

3. The 5 sigmoid curves: each of the five curves starts small and grows in fruitfulness over time with max fruitfulness being after year 10. The four colored curves represent the four subsystems, or functions of the school, while the bold black line is the overall lifecycle of the school.

4. The vertical lines: the two vertical curved lines are displaying the three lifecycle stages, called levels. The levels are Infancy/GoGo, Adolescence, and Prime. Infancy and Go-Go were collapsed into one domain, because this visual is the optimal path where functions develop synchronously, not the typical path where the functions develop sequentially and cause avoidable problems.

5. The color-coded levels: on the right side of the visual, the four subsystems are listed with three levels underneath each one. The levels are the outputs, or lag measures, that are created by the steps listed on the curve. The steps are listed in a particular order so that the step 1 is a prerequisite for step 2 and step 2 is a prerequisite for step 3.

6. The steps: the three steps on each of the four are the PAEI leadership activities that lead to the outputs listed in the levels. The steps are like the roots and the levels are the fruits.

7. The little numbers: the small numbers are where each of the six schools appeared to be in the lifecycle stage of each subsystem. There are 24 little numbers on the visual, since there were four numbers listed for each school. For example, a 6 is listed three times in Prime for teaching and learning, finance and operations, and marketing and admissions, because School 6 seems to be in Prime in those three subsystems.

Subsequent sections of this chapter will explain how the six cases and the literature review aided in generating the levels and steps under each subsystem.

Research Questions

To understand the process of growth and leadership throughout the lifecycle in classical Christian schools, the following three research questions provided the organization of the literature review, the multiple case study research methodology, and the final conclusions.

1. *Defining Prime*: How does one know when a classical Christian institution is performing at its Prime, and does Prime fit with the philosophy and theology of the classical Christian educational mission?

155

The literature review showed that Adizes's definition of Prime comes with both commendation and caution; the term "fruitfulness" captures the importance of achieving results without compromising to faithful service as defined by the school's classical and Christian mission. The levels and steps of the school growth taxonomy show what prerequisites are needed to reach Prime. School 6 was diagnosed as being in early prime based upon their performance in the four subsystems. The one barrier identified for School 6 was the limitations of their current campus and their lack of capital campaign planning. School 5 was chosen as a projected-Prime school, because the school is a 22-year-old ACCS-accredited K-12 with owned and leased facilities. Upon closer inspection through the focus group, the school's board and head need an injection of "E" to solve their campus problems and cross over into Prime within the next five years. School 5 also had significantly less market penetration than School 6.

School 1 was essential in showing that a school can be born in Prime. In the Adizes methodology, problems are solved by developing the missing PAEI roles starting with E. When this is done in a one-by-one fashion, it is called the typical path. There is a road less traveled by known as the optimal path. Adizes writes, "I have tested that path in my work with start-ups. And it works."[2] In a number of ways, School 1 appears to be changing in a planned and controlled manner while keeping everyone together despite the many changes. Adizes believes that the Integrative management role precedes the Entrepreneurial role in organizations that take the optimal path. He writes, "The common denominator is a sense of purpose that exceeds profit motivation."[3]

A school born on the optimal path has experienced a Prime birth where the founders developed I, E, and A before the first day of school, which is when P will emerge. Usually, an organization born in Prime would be a child-company of a fertile parent-

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[2] Ichak Adizes, *Managing Corporate Lifecycles* (Santa Barbara, CA: Adizes Institute, 2004), 377.

[3] Adizes, *Managing Corporate Lifecycles*, 391. In the optimal path, the focus is on identity more than on activity.

company. School 6 has actually given birth to two schools within their larger school in the past five years: one for students with learning differences and one for homeschooling students needing certain academic courses during their high school years. These two schools benefit from the more than two decades experience of the school's leaders as well as the school's mature PAEI subsystems. Although School 1 was founded by very capable leaders when it comes to AEI, the P function is still developing. The I is obvious at School 1, because it all goes back to two moms sitting in a van in their church's parking lot praying about starting a classical Christian school for their kids. School 1 and School 6 are both in states favorable to private education. School 1 ranks sixth on highest state private school enrollment whereas School 6 ranks first.

2. *Early Leadership Causes of School Growth and Aging*: What are the characteristics of schools in Courtship, Infancy, and Go-Go, and what leadership behaviors contribute to growth and aging in these early stages?

        In the school growth taxonomy, Courtship, Infancy and Go-Go are all collapsed into one stage. The main reason for this is because this researcher desires that startups be born in Prime by partnering with the ACCS, or similar groups, as a parent company of sorts. If a school plans to navigate the transition from Go-Go to Adolescence during their Courtship, then they will be born in Prime. The big difference is that schools that have a Prime birth are born with budgets, systems, processes, and structure whereas schools on the typical path might not fully develop these until more than a decade after their birth. School 2 and 3 are both K-8 schools more than a decade old that just recently clarified their administrative structures and processes. Thus, these schools have more than a decade of problems in their wake that they could have avoided. By collapsing these three areas into one section, schools can take the simultaneous approach to developing the roles instead of taking the one-by-one approach that generates avoidable problems. In essence, a Prime birth requires a parent-company or founders with two or three dominant letters in their PAEI code with one of them being the Integrative management function. The subsequent section that describes the school growth taxonomy

levels and steps will further answer the characteristics of schools at this level and the corresponding leadership behaviors.

As far as the characteristics of aging in the earlier stages, the only evidence that this researcher sensed was the board of School 2. Adizes calls "E" the vital sign of a healthy organization and School 2 had E in administration, but it was not evident in the board, which is why the school still does not have a strategic plan, a strategic financial plan, nor is it accredited. Schools in the later stages begin to age because an obsession with Administrative management and an aversion to risk and ambiguity. It appears that schools in the earlier stages need a healthier differentiation between the work of the board and the work of the head of school. School 2 did not seem to have an unhealthy obsession with A but rather a negligence of E; this could be due to negligence on the head of school's part or simply a lack of awareness of best practices in governance. One activity that both School 2 and 5 have is the monthly board meeting, which appears to emphasize oversight at the cost of insight and foresight.

3. *Later Leadership Causes of School Growth and Aging*: What are the characteristics of schools in Adolescence and Prime, and what leadership behaviors contribute to growth and aging in these early stages?

One obvious characteristic of Adolescence is when the school is establishing its identity. This was definitely true of both School 2 and 3, who are currently serving grades PK-8 but have plans to serve grades 9-12. The PK-8 schools in this sample had a much more youthful ethos than the three schools that offer through grade 12. Not only were those three schools more seasoned in their teaching and learning than School 2 and 3, but they also had a clearer institutional identity in their marketing and admissions materials. School 2 and 3 had both experienced significant enrollment growth in the past two years along with making a number of new hires. Both schools had parents and teachers who had different understandings of classical Christian education and the school's mission. The simple fact is that schools who offer grades K-12 generally have been at the school longer. Additionally, schools in this sample who offered through grade 12 were all more than

158

twenty years old and the focus group participants had a longer tenure at the school than Schools 1-3.

A school that is on the typical path who is going through adolescence is developing the A function. School 2 and 3 had both just decentralized around the time of the focus group. Decentralized leadership is key to avoiding the founder's dilemma and scaling up. Healthy things grow and growing things multiply. As the school grows, it must develop more leadership internally, not just more front-line teachers and staff. The bigger the school gets, the more there is a need for more leadership because there are far more lines of communication.

The most obvious characteristic of schools in Prime is that they are creating new problems, yet they are not schizophrenic like a Go-Go. Although one participant in School 6's focus group did assert that part of the school felt like it was in Go-Go, a better diagnosis is early Prime because School 6 has been effective in creating new programs for its students. Moreover, School 6's leader is an EI who has her ear to the ground on what parents want, and finds a way to craft mission-appropriate ways to deliver desired service. This is why School 6 is beginning to offer PK. This entrepreneurial vitality was not evident at School 5, who has not quite figured out how to thrive in its market and establish itself in the community.

For more seasoned schools in the later stages of growth, the biggest barrier is fundraising and facilities. The one area that School 6 was not in Prime was in fundraising and facilities. It appears they have never consistently cultivated major donors in order to launch and land a capital campaign. School 5 was also facing major issues related to facilities due to being on two campuses. Having a board who approaches their work from a multi-year perspective is essential in this domain because of the long runway of time needed to successfully manage a project of this magnitude. Both the School 5 and 6 headmaster were the EI statesman code, which fits with their stage in the lifecycle. Both of these headmasters are involved in teaching seniors but do not appear to be involved with major donors on a consistent basis.

159

The driving belief behind this research was that a robust taxonomy of school growth and leadership can tie together the many different stages of school maturity to explain how school growth flowers from one stem—complementary leadership throughout the lifecycle.[4] This taxonomy shows three levels of school maturity and describes the three leadership behaviors needed at each of those stages for each of the four school subsystems: teaching and learning, marketing and admissions, finance and operations, and fundraising and facilities. The subsequent section that describes the school growth taxonomy levels and steps will further answer the characteristics of schools at this level and the corresponding leadership behaviors. Table 14 presents the previous figure to show the linear levels and steps of the school's lifecycle and the school's leadership.

Table 14. School growth taxonomy: levels and steps

	Teaching and Learning	Marketing and Admissions	Finance and Operations	Fundraising and Facilities
Stage 1 Infancy/Go-Go	Level 1: House & Principal	Level 1: Website & Raise Tuition	Level 1: Hard Coverage & Processes	Level 1: events and annual lease
	Step 1: Observations	Step 1: Open Houses	Step 1: Budgeting	Step 1: head of school
Stage 2 Adolescence	Level 2: Accreditation & Integration	Level 2: PREP & POG	Level 2: Cash Reserves and Staff Structure	Level 2: Major Donors & Board/Head
	Step 2: Training	Step 2: Partnership	Step 2: Lead Team	Step 2: HSEC
Stage 3 Prime	Level 3: Athletics/Arts & Graduation	Level 3: Creative Assets & Full Capacity	Level 3: Staff Expansion & HR	Level 3: Campaign and Campus
	Step 3: Departmentalize	Step 3: Clear Messaging	Step 3: Data Collection	Step 3: Committee on Trustees

[4] Ichak Adizes, *The Ideal Executive* (Santa Barbara, CA: Adizes Institute, 2004), 211. In Adizes's dissertation, he observed that the socialist system of industrial democracy promoted shared ownership (I) but discouraged entrepreneurialism (E). Adizes postulates that an organization reaches Prime, the ideal state of the organizational lifecycle, when four management functions are present, the producer (P), the Administrator (A), the Entrepreneur (E), and the Integrator (I). This research examines the presence or absence of these management functions in different schools along the stages of the school lifecycle using a multiple case study methodology.

Stage 1

To exhibit the stage characteristic of "House and Principal" within Teaching and Learning, the school must do classroom observations. House refers to the system of forming age-integrated groups that establish a healthy student culture within the school. Each school within this study uses the house system. Houses have a long history in European schools of providing a home away from home. Since many schools and academies operated at a distance from families as boarding schools, houses provided the familial and communal atmosphere necessary to continue the proper upbringing of children and youth into adulthood. Houses fostered healthy competition, a distinctive culture, and, ideally, moral virtues in an embodied way, through modelling and imitation. The principal refers to the leader of the teachers; the prefix of the word literally means "first" and has in mind that the principal is the first, or the lead, of the teachers. This combination, principal and house, emerged for level 1 because a strong principal can have a dramatic impact on the quality of the producer function within a school. Schools with strong principals will have higher faculty and family retention and a better academic product. The reason the house system is important at level 1 is that the house system helps students see the distinctive identity of the school and form an enjoyable and achieving atmosphere.

While School 1 had a principal, she was functioning primarily as a teacher and not providing much academic leadership. In a school's infancy, there is not much of a scope and sequence or in house-training. This was true for School 1 and 5 in that they both rely on Classical U, a teacher training streaming service, rather than providing their own training for their teachers. However, one way the academic administration can begin to grow in their pedagogical and curricular prowess is by conducting daily classroom observations of the faculty to ensure that teachers are fulfilling the promises that were made to the tuition-paying parents. School 5 had a much more mature scope and sequence that was being implemented but was still relying on Classical U for faculty training.

For marketing and admissions in level 1, the goal is to have a great website that attracts new families and to also raise tuition. All the level 1 markers are goals to hit by

161

the end of the first five years. One of the ways to do this is through regular open houses. While some schools do these in the evenings or schedule them at ad hoc times, it is best to pick a repeatable time and do them on a monthly basis (e.g., the fourth Wednesday of each month). Predictability is part of what it takes to get to Prime. Additionally, doing open houses with students present enables prospective parents to see the classical difference in action. Successful open houses are only possible on the condition that the administration is doing observations of the faculty and there is actually something true, good, and beautiful for prospective parents to see.

For finance and operations in level 1, the goal is to have +90 percent hard coverage and documented core processes. Over 90 percent hard coverage means that more than 90 percent of the school's expenses are paid for through tuition revenue. This is one of the ISM Stability Markers but is also the first challenge Adizes asserts that a company must master: cash flow. Documented core processes refer to those administrative functions that the school repeatedly does. The goal here is to make sure the school is not person-dependent but instead has institutionalized ways of doing core activities (admissions process, fundraising process, HR onboarding, etc.).

The best activity to achieve the level 1 goals for stage 1 is to use strategic budgeting. The idea of this is simple—the school should not set next year tuition's until they know the costs of running the school for the next year. This entails that the school know how many people they will employ next year, how much they will compensate them, and what strategic investments the school will make almost a year in advance. Both School 2 and 4 made significant tuition increases based upon multi-year budgeting. The discipline of budgeting immensely increases the awareness of all the core activities that impact the school. The lead administrator should create the budget and then the board should refine and approve it.

For fundraising and facilities in level 1, the goal is to have fundraising events and an annual lease. School 1's story is illustrative with fundraising—they raised more

than half of their budget before the school had even operated one single day and the school tripled in enrollment after the first year. Fundraising requires high levels of E and schools need E to grow. Hosting fundraising events in the school's first five years will force the school to craft messages about the direction of the school. For facilities, it is most affordable to go the route of sharing space with a local church. This was the case for Schools 1, 3, 4, and 5. School 6 eventually bought the church that they had leased. The lease terms should be spelled out on a written contract so that the school is not at risk for losing its temporary campus. When a school leases, it is difficult to have the foresight of E, because the space is controlled by the owner, not the school. An annual lease contract helps remove some of the risk. Assuming the space fits the growth of the school, the lease could be multiple years to reduce the risk of losing a school home. Schools doing year-to-year leases after year 5 need to craft a clearer vision and plan for their long-term school home. This has been the case for School 5 who is more than twenty years old.

All of this is difficult to achieve without a head of school. The only school in this study without a head of school is School 1, where a committed and capable board member essentially functions as the head of school. The head of school role is best filled by someone who can match the school's mission to the local market. A head of school in the first five years of the school must have both E and I in their code in order to grow the school and keep it together during all of the change. School 3's leader has both E and I and the school has been able to grow and handle the change moderately well. School 3, however, is in the process of transitioning away from the typical path toward the optimal path via process documentation, departmentalization, and new staff hires. School 2 is making similar adjustments. Schools in their first five years should work on getting a principal to develop their P function and improve admissions before they hire a head of school to do fundraising and facilities. One problem is that boards will hire someone to be their ideal executive and they are disappointed when the individual cannot do all the

PAEI functions on his own. This is why complementary teams are needed to move forward in the lifecycle.

Stage 2

To exhibit the stage characteristic of "Accreditation and Integration" within Teaching and Learning, the school must do faculty training. Level 1 was about the house system, the principal, and doing observations. Level 1's characteristic and leadership behavior simply builds upon that. At this stage, the academic administration should be doing more than observations but also coaching and training on the craft of teaching. This means that the academic administrator understands the nature of curriculum, instruction, and assessment. Both School 2 and 4 had academic administrators on this trajectory yet had not gained ACCS Accreditation. Integration refers to seeing the theological unity of the entire curriculum, which should especially be evident in history, Bible, and literature, but also in the languages, logic, math, and science. School 4 did a particularly exemplary job of this in their integrated humanities class for seniors.

For Marketing and Admissions, PREP refers to the Parent Retention and Education Program while POG refers to the portrait of the graduate. The desired outcome at level 2 is to see a group of parents that know, understand, and love the school's classical and Christian commitment to educating their own children. For them to fully embrace the school in the long-term, they need to have a familiarity with the why, what, and how of classical by means of their year-after-year relationships with teachers. If the teachers are singing from the same sheet of music, then the parents will notice. The POG is a statement of desired outcomes for all graduates and should be a big part of the school's messaging to parents. School 1 had a well-defined POG but had not yet developed their PREP. School 6 has great events that function in part as their PREP; School 3 also does events designed to educate parents but also requires parents to make a positive phone call home once per month. Step 2 is partnership which entails getting involved in the life of the school via one's gifting—this could be through volunteering at events, helping with the

house system, or using one's professional gifting to meet a need at the school. A culture of volunteerism and philanthropy are marks of healthy classical Christian schools. This is especially true in schools like the ones in this sample who charge below $10,000 and cannot afford to hire a number of staff positions, but instead rely on volunteers to help with facilities and run events.

For finance and operations, the level 2 goal is three months of cash reserves and staff structure. The three months of cash reserves provide margin for eventualities in school operations while the staff structure relieves some of the administrative burden from the academic leaders of the school in the areas of enrollment, finances, facilities, human resources, and student information. The step to get to this level is through forming a leadership team that runs the school. The presence of leadership is evidence that the school is not run by the board and that there is not a founder's dilemma where the school is dependent upon one person. School 2 and 3 both recently formed leadership teams while School 4 has struggled to form a leadership team due to an interim principal who cannot give full-time commitment. Having PAEI present on the leadership team is essential for the institutional to move towards level 3 Prime.

For fundraising and facilities, the goal for level 2 is major donors and a strong board/head relationship. The school must shift from using events for fundraising to cultivating major donors. If the school already has both a head and a principal and has formed a leadership team, then the next area needing attention is ensuring that the board is strategic and works through its one employee the head of school. If the head is effectively managing present operations of the school through the administrative team, then the board is freed up to move from pure oversight to exercising both insight and foresight. School 5 was a school that, due to its board process and structure, overemphasizes oversight at the expense of foresight and insight, which impacts its future regarding fundraising and facilities. The step to correct this and move toward is through Head of School Support and Evaluation Committee (HSEC) and the Strategic Plan (SP)

and Strategic Financial Plan (SFP). These are the core features of the ISM Board Governance model and are listed in the ISM Stability Markers. The HSEC is the Board's delegated committee to support and evaluate the head's operational work; this committee keeps the E strong in the board by preventing Administrative oversight from crowding out the E through delegating the A to HSEC. The SP and SFP are E tools that provide the evaluative benchmarks and direction for both the board and the head. One factor impeding the growth of School 2 is the absence of E in the form of a SP and SFP. Creating these tools will help answer questions regarding the fundraising needs and the facilities vision. A school only has margin to cultivate major donors on a consistent basis if the SFP, SP, leadership, head of school, HSEC, and principal are all in place.

Stage 3

To exhibit the Prime stage characteristic of "Athletics/Arts and Graduation" within Teaching and Learning, the school must departmentalize so that the leaders can specialize to a degree. As schools begin to graduate students, it is important that students have something to do at the end of the school day to develop socially, athletically, and artistically. Once the school hits a certain size, there should be a lower school principal/head as well as an upper school principal/head. Although School 4 has not yet successfully made this jump, Schools 5 and 6 have been effective in departmentalizing. School 5 had departmentalized in the academic realm but not yet with operations and finance; those leaders do not have teams to run their subsystem so they have to be both Producers and Administrators. At School 6, there are layers of leadership for these operational functions, not just the academic ones. There is also an athletics director as well as a fine arts director.

To exhibit the Prime stage characteristic of "Creative Assets and Full Capacity" within Marketing and Admissions, the school must develop clear messaging so that the school communicate this message. Only School 6 has been able to achieve this status primarily due to the marketing and advertising background of one of the founders. It helps

that their founders are still at the school even after twenty years; this level of consistency has been an important ingredient in their fruitfulness. The school's core virtues are even displayed prominently in the architecture of the building. In other words, their message has been institutionalized so it is not difficult to make creative marketing assets that help the school move toward full enrollment capacity. The other schools have not been as effective in clarifying their messaging. The leaders of School 6 have a clear sense of their institutional identity and their distinctive mission.

To exhibit the Prime stage characteristic of "Staff Expansion and HR" within Finance and Operations, the school must regularly collect data that guides institutional decisions. Staff expansion refers to hiring backstage roles that help the school operate smoothly in legal, finances, accounting, testing, and college advising. Human resources (HR) includes both human resources administration (contracts, compensation, benefits, communication) as well as human resources development (professional development, performance reviews, etc). School 6 was the only school in this study with a director of human resources. A car's owner becomes aware that the oil needs changed when a sensor in the car indicates to the driver that an oil change is in order; the car is designed to collect, analyze, and communicate data that helps the owner operate the vehicle. In a similar way, the school should be tracking key information in teaching and learning, marketing and admissions, finance and operations, and fundraising and facilities to identify which staff might help save costs or increase revenues. Some positions are revenue-enhancing (admissions and fundraising) while others are cost-reducing (human resources). A solid HR person can reduce turnover, which is incredibly costly for schools.

To exhibit the Prime stage characteristic of "Campaign and Campus" within Fundraising and Facilities, the school must form a Committee on Trustees to evaluate and strengthen the board as well as recruit new members. This stage in the life of a school is where they can think long-term and are not be dependent upon another entity to house their school. Conducting a capital campaign means that the school has moved from merely

167

doing events for fundraising to also to cultivating major donors who could participate in a capital campaign for the construction of a long-term campus. The only school in this study that had its own campus was School 6, but it did not do a capital campaign, nor does it have a committee on trustees. School 2 and 5 both owned part of their campus. The reason a committee on Trustees is important is that it weeds out weak board members and waters committed board members to max fruitfulness for the benefit of the school.

Conclusion

The implications of this study are that school leaders now possess a framework for moving toward Prime. This research culminated in a taxonomy for school growth whether a school is in Courtship and planning its future endeavor or is stuck in the conflicts of Adolescence. It was based upon the work of Ichak Adizes, the Association of Classical and Christian Schools, Independent School Management, and the six case study schools. The original problem that brought about this research was the number of classical Christian schools who were stuck at K-8 but wanted to go through 12th grade. Through the stages, levels, and steps, there is now an actionable framework for these schools to move toward accreditation and graduation.

The key takeaways from this research are summarized in figure 5, "School leadership in the lifecycle," and table 14, the "School growth taxonomy." These two tools are based on observing the leadership of five different schools at the initial, intermediate, and advanced stages of the school lifecycle. This research helps school leaders understand where they are in the school lifecycle and what specific leadership style and strategies are most important for the moment of their stage of the lifecycle.

APPENDIX 1

SCHOOL PARTICIPANT INVITATION

The following letter was mailed via electronic mail to schools that met the Case study participant selection criteria in table 6 and were within the driving and scheduling constraints of the researcher.

David Seibel
1123 Woodbridge Lane
Indianapolis, IN 46260
dseibel@coramdeo-in.com

January 21, 2022

Dear School Leader,

The purpose of this letter is to invite you to participate in a study on classical Christian school leadership. My name is David Seibel, and I am completing my Doctorate of Education in classical Christian school leadership at Southern Baptist Theological Seminary. The driving question of this multiple case study research is, 'How does leadership contribute to organizational growth throughout the stages of maturity of the school lifecycle?' Developing greater clarity on the sources of healthy school growth will enable the classical Christian movement to impact more families in the decades to come.

By conducting in-depth research on leadership throughout the school lifecycle of a handful of classical Christian schools, the phases in the growth pathway will become more clear for coming generations of school leaders. The four schools participating in this study will collectively represent the range of degrees of maturity in the school lifecycle. Your school has been invited to participate, because you can provide this research with valuable stage-specific data to better answer the research question on the relationship between school leadership and organizational growth.

The primary instrumentation for this research is an extended focus group section with a cross-section of your key players whose cooperation is needed to realize organizational transformation. The focus group will have the following goals:
   (1) Your team will learn a framework for correlating four leadership behaviors with the overall behavior of the institution (the lifecycle).
   (2) Your team will collectively diagnose your school's stage in the lifecycle based on the nature of the problems it is facing and the presence of certain leadership roles
   (3) Your team will establish a set of manageable yet meaningful goals to 100% complete within the next 90 days

This methodology is informed by the work of management expert Ichak Adizes (https://www.adizes.com/) outlined in books *The Ideal Executive and Why You Cannot Be One* and *Managing Corporate Lifecycles*. There will be a modest level of pre-reading involved in order to prepare your team for the time together during the focus group.

169

For logistics, here is a summary of what's needed to participate in the study:
  (1) Assemble the team of individuals whose cooperation is needed to cause change
  (2) Schedule the focus group on a Friday-Saturday in February or March
  (3) Complete the pre-visit questionnaire
  (4) Participate in the focus group
  (5) Complete the pre and post-visit questionnaire.
  (6) Provide reimbursement for any hotel or airfare expenses associated with visit

Before accepting this invitation, your school leadership team should:
  ☐   be ready for healthy growth and lasting change
  ☐   possess a culture of mutual trust and respect
  ☐   pursue continuous improvement and a desire for operational excellence
  ☐   be committed to a classical Christian educational methodology in all aspects

To be clear, I am not a Certified Adizes Associate providing his signature SymBergetic services. Instead, I have studied all of Adizes' work, worked with a Certified Adizes Associate at the school where I am head of school, Coram Deo Academy in Indiana, and developed a means to see if his theories could be descriptive over how classical Christian schools behave.

If you are willing to participate in this study, please email me at dseibel@coramdeo-in.com or dseibel@accsedu.org so that we can begin the logistics process. Also, send me any questions that you might have as well. Thank for you considering providing assistance in this research.

In Christ,

David Seibel
Ed.D Candidate
The Southern Baptist Theological Seminary, Lousiville, KY

APPENDIX 2

PRE-VISIT QUESTIONAIRE

General Summary
1. How old is the school and how did it get started?
2. What big changes have taken place in the past three years? Any big changes planned for the next three years?
3. What internal issues are you struggling with?
4. Does the school have people problems?
5. What are your key problem areas?
6. What is your current focus?
7. What is the biggest strength/weakness of your school?
8. How does your team define success?

Leadership Dynamics
1. What is the overall tenure of the board chairman, the head of school, and any other lead administrators?
2. What is the overall board governance structure and how does board relate to administration?
3. How many administrators are there and how are the divisions organized?
4. How do you define who is on the leadership team and what challenges do you all face?
5. What are some of the major initiatives in your strategic plan? How did you perform on your most recent strategic plan?

Community Alignment
1. What has your current enrollment and student retention been in each of the three past years including the current year?
2. What has your total number of full-time equivalency employees and employee retention been in each of the three past years including the current year?
3. Who are your school's biggest competitors for mission-aligned families?
4. What is the general population of your area and the family median income?
5. What are your school's competitive advantages?
6. What challenges are being brought out by the competition's advances?
7. What is full enrollment for your school? How many empty seats do you have? What is your long-term target enrollment?
8. What is your approach to marketing and admissions?

Core Operating Mission
1. What extra-curricular programs do you offer at your school? Any plans to add more?
2. How do you measure the impact on those that you serve?

3. What are the biggest challenges facing the schools employees? Parents?
4. How do you teach your parents what classical Christian education is?
5. Have you added or abandoned any programs in the past three years?
6. Describe your current campus/facilities scenario. How has it changed in the past three years and are there any plans to make changes in the coming three years?
7. What is school leadership doing to train and support faculty?
8. How do you disciple students?

Sustainable Resources
1. Describe how you engage donors and some of the successes and difficulties.
2. How much money do you typically raise in a given year?
3. What percentage of expenses is covered by tuition revenue in each of the last three years including the current year?
4. How do you approach tuition assistance?
5. What have been your total operating expenses in each of the three past years including the current year? Next year?
6. How does your team do long-range strategic financial planning?
7. What are the major challenges facing the school when it comes to finances in the next three years?

APPENDIX 3

FOCUS GROUP GUIDE

In order to ensure that the focus group concentrates on the research questions and that the focus group experience is consistent from one school to another, the moderator will utilize the guide below to preserve consistency across the cases. All human participants will sign a Participant Agreement upon arrival to consent to participate in the research.

Introduction: Mutual Trust and Respect and Different Management Roles in a School
1. The moderator reviews the agenda, introduces the Adizes methodology using the corresponding slides, and assigns the roles of timekeeper and secretary who will present a summary review at end of day.
2. All participants introduce themselves: role, years at school, and biggest changes in the school in past three years. Moderator will write on board the changes as well as years at school.
3. Moderator presents the Mutual Trust and Respect and Different Management Roles slides. After the presentation, participants are given time to identify which of the management roles best describes themselves.
4. Afterwards, others will guess what each individual's management role is, and then that individual will share what he/she thought it was. The audio from this part of the session will be recorded . While the participants are sharing, the moderator will write each individuals management role on the board. At the end of the exercise, the moderator will tally up how many individuals fall into P, A, E, and I.

Problem Generation: Change and Every School's Biggest Problem
1. Moderator presents the Change and Problems slides
2. Participants learn rules for problem-writing and write problems on 3x5 cards.
3. One by one, moderator reads each card to the group to ensure it follows rules.
4. During lunch, the moderator sorts the problems into categories keyed to the numeric codes of the ACCS Accreditation Standards and writes a code on each card.

Problem Categorization & Prioritization
1. Individuals are put into groups and given the now-coded cards. The problems are already sorted into categories, but now the groups orders the problems in their category by level of importance.
2. Each group shares the results of their prioritizing.

Life Cycle Diagnosis
1. Moderator shares the teaching, and then individuals have time to decide what stage they think the school is.
2. Individuals return to different groups to compare notes on which lifecycle stage that they think the school is in. One person from each group presents the group's perspective and moderator writes answers on the board. This section of audio is recorded.

Conclusion: Wrap up and Going Forward

    1. The assigned secretary gives and end of day summary.

    2. The Moderator reminds group of total years of experience in the room, the biggest changes in past three years, the summary PAEI codes, the total number of problems in each area, and the self-diagnosis of lifecycle. The Moderator also collects all posters and index cards for data entry.

    3. The Moderator shares the Going Forward slides to indicate best practices going forward and the need to fill out the post-questionnaire once it is sent.

APPENDIX 4

FOCUS GROUP AGREEMENT TO PARTICIPATE

The research in which you are about to participate is designed to describe the relationship between leadership and school lifecycle. This research is being conducted by David Seibel for purposes of his dissertation at the Southern Baptist Theological Seminary in Louisville, KY. In this research, you will participate in the activities of the Focus Group as you feel inclined. Any information you provide will be held strictly confidential, and at no time will your name be reported, or your name identified with your responses. Participation in this study is totally voluntary and you are free to withdraw from the study at any time.

Signature:_____ Date:_____

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ABSTRACT

ICHAK ADIZES'S ORGANIZATIONAL THEORY APPLIED TO
THE CLASSICAL CHRISTIAN EDUCATION MOVEMENT:
A MULTIPLE CASE STUDY

David Anthony Seibel, EdD
The Southern Baptist Theological Seminary, 2022
Chair: Dr. Justin A. Irving

Using a multiple case study methodology, this research investigates the leadership contributions to school growth using the organizational theory of Ichak Adizes. By utilizing representative schools for each stage of school maturity, a broader description of how schools mature over time emerges. Moreover, the connection is made to certain management roles that bring about organizational growth in the school. Chapter 1 describes the need for such research within classical Christian education. Chapter 2 describes the relevant precedent literature on organizational lifecycles from Ichak Adizes. Chapter 3 describes the qualitative multiple case study methodology used in the study. Chapter 4 presents the case reports from the different schools, and chapter 5 presents a taxonomy for school growth throughout the school lifecycle.

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