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Portraits of Leaders: Striving for a Fuller Humanity

Don P. Schulte¹ and Barbara S. S. Hong²

Abstract

This case study uses real events and hypothetical elements associated with the struggle for school finance equity in Texas. It involves a superintendent faced with difficult choices brought about by a convergence of events and issues, namely, by a national and state economic crisis, the demographic realities of his district, a historically contentious political landscape of his state, a tradition of leadership for social justice established in his school system, and by his own career aspirations. This work is particularly significant because it prompts specific questions related to elements of social justice leadership that are not often specifically addressed in professional preparation programs, namely, the chosen means of advocacy and the resulting consequences to the actor. It also directly addresses a critical domain of social justice action, school finance equity.

Keywords

leadership for social justice, school finance equity, transformative leadership

To surmount the situation of oppression, people must first critically recognize its causes, so that through transforming action they can create a new situation, on which makes possible the pursuit of a fuller humanity.

Freire, 1999, p. 29

Preface

This case study uses real events and hypothetical elements associated with the struggle for school finance equity in Texas. Simon Morgan (pseudonym), who served as

¹University of Texas at El Paso, USA
²The Pennsylvania State University, Altoona, USA

Corresponding Author:
Don P. Schulte, University of Texas at El Paso, TX 79968, USA
Email: dpschulte@utep.edu
the superintendent of the Green Meadows Independent School District (GMISD; pseudonym) in the 1980s, was real. His story as represented in this work is true. Tomas Ortega (pseudonym), a former Texas superintendent, who is discussed in the case analysis section of this study, also exists. His remarks are authentic. Ricardo Garcia, Morgan’s successor, is fictitious, and his story is offered herein for its hypothetical value to the study.

Portraits of Leaders

Superintendent Ricardo Garcia stared pensively at a predecessor’s portrait that hangs in his school district’s boardroom along with the paintings of all past chief executives of GMISD. GMISD is a suburban, property-poor district that enrolls 42,000 students and maintains 45 campuses. This school system educates much higher numbers of English language learners and economically disadvantaged students than state norms.

Garcia knew that this particular superintendent, Simon Morgan, made a courageous and important contribution to the district about 25 years ago. Tarnished metal inscription plates are positioned just below each portrait. Superintendent Garcia put on his glasses, moved closer to the ornate frame and read, Simon Morgan—GMISD Superintendent—1982 to 1988, which was deeply etched beneath the portrait that further stirred his already unsettled mind. Garcia backed away and again gazed at Morgan’s serious and determined face, sighed and slowly returned to his nearby office.

Simon Morgan

Simon Morgan was employed by the GMISD Board of Trustees at a time when the district was transforming from a rural district to a fast growing suburban system. The previous superintendents adequately managed the relatively small, three-campus, 3,000-student district, but board members realized that they needed someone with “big city” experience to guide their beloved school system into the future. Simon was an associate superintendent for research and evaluation in a nearby metropolitan district. He also happened to reside in GMISD and was a neighbor to several of the board members. Before long, trustees found that they had hired someone with a much larger vision of moving the school system forward than just knowing internal district management, such as how to plan for growth, build schools, and update and fortify instructional programs.

Just 2 years into his tenure as superintendent, Morgan convinced his board to join a small group of property-poor districts, which through a Latino advocacy organization, sued the state claiming that the existing educational finance system was unconstitutional. Due to a heavy reliance on property taxes to support education, affluent systems, because of their high values, could spend great sums of money and maintain low ad valorem levies, while poorer districts expended much smaller amounts on students and were forced to impose high tax rates. Although there were a large number of
below-average wealth districts that could have benefited from this litigation, only eight superintendents initially joined the cause.

It was not politically popular or expedient to sue the state. In this comparatively conservative “red” state, the governing education agency certainly did not appreciate dissension. Furthermore, chief executives who gained reputations for “buck[ing] the system” quickly found that they were not the most viable candidates for advancement to larger, better paying districts, the normal career track for those occupying this terminal administrative position in public education.

Morgan’s efforts reaped rich fruit. After five long years of court battles, the state’s highest court unanimously agreed with the property-poor districts and found the system to be indeed unconstitutional. Since that time, low-wealth districts, such as GMISD, have realized much greater equity in terms of available revenue and tax rates. Everything that money can buy, including experienced and effective teachers, quality facilities, leading edge technology, smaller class sizes, and early childhood programs, was now achievable in economically depressed regions. Student performance in property-poor districts vastly improved in all subject areas in view of state averages. Ultimately, the students in these schools benefited from the efforts of leaders, such as Simon Morgan.

Morgan never advanced beyond GMISD. In fact, just a few years after the court victory, he left the district under some duress. As is often the case, board members swiftly moved on to what they deemed as more important local issues and Morgan’s relative shortcomings. Slowed by failing health and no longer possessing the strength or will for a prolonged battle with the board, Morgan retired in 1988.

Bitter and disillusioned, Simon spent most of the balance of his life critical of the district as evidenced by his disparaging letters to the editor and by other severe statements made to community members regarding the current state of the school system. However, about a year before his death, there was a change in the composition of the board, and a new administration took the helm. Recognizing his selfless, altruistic efforts, Morgan was honored for his contributions to equity at a board meeting, and just months before he died, the district named a school after him. He passed at peace with the district and the district with him.

The Dilemma

Ricardo Garcia knows Morgan’s story well, which combined with renewed aggressive attacks on finance equity caused by the failing economy is the cause for his present emotional distress. Superintendent Garcia had sailed smoothly through the ranks following a traditional course. He had been a teacher, principal, and assistant superintendent in a city located at the opposite end of the state. He then became a superintendent of a midsize district located in the same region, which under his leadership was academically commended by the state for the first time in its history.

When the chief executive’s job opened in GMISD, a head hunter encouraged Garcia to apply. Knowing that GMISD was now one of the larger suburban districts in
the state, he decided to submit his letter of interest. Garcia’s ultimate goal was to be a large city superintendent, and he knew that GMISD would be a sturdy next rung on the typical superintendent’s career ladder. As he has many friends and family in the state, he desired to remain for the duration of his working life. He got the chief administrator’s job in GMISD and has served 3 years in good standing with the board and community.

In 2011, the state provided estimates to all school districts of anticipated revenues for the next biennium coming in the midst of the failing state and national economies throughout the country. This bleak estimate included a US$15 billion shortfall in education funding for the state, which translated to a loss of US$20 million in revenue to GMISD. The legislature is contemplating ways to restructure school funding formulas, which are generally recognized as quite complex, to live within a more austere budget, including the dismantling of equalization mechanisms, discontinued funding for early childhood programs, and in support of reduced class size mandates.

Remaining vigilant to past gains and potential slippage, the same Latino advocacy group that recruited Simon Morgan to join the ranks of plaintiffs in the 1980s ran impact models to determine the effects of these proposals on rich and poor districts throughout the state. The findings were alarming. If representatives enacted these changes as proposed in draft legislation, the gaps between the affluent and low-wealth districts will again widen to levels that existed prior to the relief provided by the courts in the 1980s. This advocacy organization is also greatly concerned about sun-setting provisions of the education code—such as early childhood initiatives and reduced class sizes in the early grades—that have directly benefited property districts with high numbers of minorities, English language learners, and lower socioeconomic groups.

The state’s rich districts have gained enough clout and influence in the legislature to pass these new finance laws. These advantaged entities are prepared to seize the moment. They continue to vigorously oppose the court-mandated relief of the 1980s, which caused a redistribution of funds away from the more prosperous regions of the state to poorer areas. Attorneys for the Latino advocacy group have recommended preparing another lawsuit in anticipation of the likely passage of this regressive proposal. Remembering GMISD’s steadfast support of the earlier school finance litigation, the lawyers came knocking on Superintendent Garcia’s door with the same invitation that Simon Morgan eagerly accepted 30 years earlier.

Superintendent Garcia returned to his office after his private and extended gaze at Simon Morgan’s portrait. Ricardo is a committed and proven educator who believes in doing the right things for children, which he knows involves leading for social justice. In fact, during his career, he has taken firm positions on a number of causes, such as the unfairness of present educational accountability policies.

Garcia even advocated in community forums to bring adequate water and sewage systems to neighborhoods in his district that could accurately be described as “third world.” However, he has never been involved in litigation of this nature and is aware of the potential cost of picking up this particular “rebel banner” to his professional
career, especially in a conservative state with a close-knit network of “politically correct” head hunters who can make or break candidates.

He ponders, “If I champion this immediate cause, will I ever have opportunities to engage in future pursuits for kids in even broader arenas?” In this vain, Garcia, a former history teacher, remembered President Kennedy’s apprehension about an all-out pursuit of civil rights legislation during his first term in office fearing that it would cost him an opportunity for a second, in which he could afford to be more of a statesman and less of a politician.

The superintendent continued his speculation, “Will my participation in this litigation result in ‘punishment’ inflicted by the defendant state education agency?”

Are there other ways I could advocate for my district short of participating in a lawsuit, such as making contact with my legislative delegation, writing a guest column in the local newspaper, proposing a resolution in support of equity to my board, or perhaps by acting through professional organizations?

Superintendent Garcia then closed his eyes and leaned back in his overstuffed executive-style chair. An image of Simon Morgan’s passionate eyes appeared in his mind only to slowly fade into a gray haze.

Case Analysis

This case involves a superintendent caught between an offer to lead for social justice and the limitations that related actions may have on his longer range professional career goals and more immediate sanctions that may result from participation. There is no universally accepted definition of social justice (McKenzie et al., 2008). There are, however, some meanings that help to shed light on the concept and foster greater understanding. “Leadership for social justice investigates and poses solutions for issues that generate and reproduce societal inequities” (Dantley & Tillman, 2010, p. 20). Leaders for social justice are also called transformative (Dantley & Tillman, 2010).

Theoharis (2007) suggested that leaders who adopt this philosophy “make issues of race, class, gender, disability, sexual orientation, and other historically and currently marginalized conditions in the United States central to their advocacy, leadership, practice and vision” (p. 223). In addition, in relation to leadership for social justice, English (2005) stated that “it demands the practitioner and research questions to be asked and that faith and obedience be challenged instead of privileged” (pp. 9-10).

This case study is particularly significant because it prompts specific questions related to elements of social justice leadership that are not often deliberately and systematically addressed in professional preparation programs, namely, the specific, chosen means of advocacy and the resulting consequences to the actor. It also evokes queries associated with what Marshall and Oliva (2006) referred to as “traditional
bureaucratic rationality” (pp. 7-8). Superintendent Garcia is an educator who finds himself confronted by a need for social justice action but is distressed because his potential involvement is apparently incongruent with his “traditional bureaucratic rationality.”

This work is also important because the direct treatment of the finance equity topic represents an important extension of the mainstream literature on social justice leadership development, which often focuses on student achievement, preparing students to be critical citizens, and inclusive classrooms, such as proposed by McKenzie et al. (2008). It can certainly be argued, as it was in this litigation, that there is a connection between finance equity and student achievement, but this specific issue is generally not sifted out of the mix for exclusive examination.

Although this case is hypothetical in terms of Superintendent Garcia’s struggle with the consequences of an economic downturn to his state, existing financial problems are real and can produce inequitable effects on property-poor districts. For instance, Sepe and Roza (2010) contended that the current economic crisis has had particularly negative impact on districts like the one Garcia leads, school systems with high numbers of low-income and minority students. Addressing the tendency of districts to excess teachers by seniority in response to the economic crisis, Sepe and Roza found,

As the all-too-typical story goes, after a few years, teachers with more experience exercise their seniority rights and move to wealthier schools in a district, or leave teaching all together. In their place, less experienced teachers move into the high-poverty schools, leading to the teacher experience inequality. (p. 1)

Oliff and Johnson (2010) stated, “The recession has driven down state revenues by record proportions. Education makes up the largest single item in state budgets, and spending cuts there have been deep and widespread” (p. 1). They further observed that many states have cut prekindergarten and after-school programs as a result. In Texas, two of the major criteria for admission to early childhood programs are low-income standing and limited English proficiency (Walsh, Kemerer, & Maniotis, 2010), which indicates the target population for intended benefit. Extant literature, therefore, supports the realistic nature of this scenario.

Adams, Bell, and Griffin (1997) offered “The Action Continuum,” (p. 109) which describes a range of behaviors that support or confront oppression. At one extreme of their spectrum, they suggested that there are those who are supportive of oppressive acts and, at the other end of the continuum, there are individuals who initiate assertive actions to stop or prevent discrimination. One of the middle points on the continuum describes actors who may be aware of a problem in need of remedy but do not take action due to fear and other reasons. Subsequently, the individual experiences discomfort caused by the disjuncture between awareness of an issue and failure to act.

In addressing the consequences to the actor who engages in more proactive actions involving social justice causes, Schulte, Schulte, Ivy, and Hong (2009) contended that
there are activists who are willing to engage in the electoral process or take their
battles to the courts in an effort to hold public officials accountable for their
actions or inaction. If we declare ourselves as leaders for social justice, we must
do a lot of soul searching to determine what means should be pursued. This
introspection is vitally important because, at the end of the day, the means often
determines the cost to the individual who carries the banner of change. (p. 235)

These authors further maintained that more assertive approaches to achieving
equity increase the possibility of negative consequences to the participant leader.
The cost of this form of leadership can be high. In relation to the subject of this case
study, school finance reform in Texas, Cardenas (1997), a former superintendent and
litigation participant, proffered that school district participation is often lacking due to
“fear of retaliation by defendant (state education agencies)” (p. 8). He further explained
that when he was involved in similar litigation he was “subjected to extensive harass-
ment by the state agency” (p. 8). Cardenas cited “frequent and meticulous audits”
(p. 8) as examples of how he was retaliated against.

Cardenas (1997) eventually left his job as superintendent because he felt that the
constant state agency regulation left him in too precarious of a position to effectively
bring about change. In relation to the fear associated with transformative action,
Schulte et al. (2009) asserted, “Our institutions profess democracy and equity, but are
often uncomfortable when citizens pursue these ends in a direct way and may be
inclined to suppressive action” (p. 231). Cardenas named another superintendent,
Tomas Ortega (pseudonym), who faced intimidation as a result of his advocacy in this
arena.

Tomas Ortega was also involved in the fight for Texas school finance equity. In
fact, he first initiated the discussions with the Latino advocacy group about filing the
case, and the lawsuit bears his former district’s name as the first-named plaintiff.
When asked whether he too faced intimidation or suffered career repercussions as a
result of his involvement, he stated, “When you swim upstream, you are going to get
water up your nose” (D. Schulte, personal communication, March 3, 2011).

Tomas believed that he did in fact experience career limitations due to his participa-
tion. He cites an example of being named one of the two finalists for the superinten-
dent’s position in one of the largest districts in the state. A few days after this
designation, he received a rather abrupt call from the district. Ortega said the message
was, “Thanks, but no thanks” (D. Schulte, personal communication, March 3, 2011).
Although he will never know the true reason for not getting this job, he speculates that
his involvement in the finance case was the primary factor. He ended the conversation
by stating that Cardenas (1997), the author cited above, was “his guru on school
finance, not only intellectually, but spiritually” (D. Schulte, personal communication,

Like Simon Morgan, Tomas eventually left his plaintiff district and ironically
assumed an important and influential position in the same state agency that he sued
years earlier. He is currently the director of one of the state’s educational service
centers in a property-poor region. He continues to be a highly respected advocate for below-average wealth school districts.

As stated in the preface, this case study is partially based on real people and events. Simon Morgan is a pseudonym for an actual superintendent who engaged in the battle for school finance equity in Texas. He did not move beyond GMISD and did eventually succumb to failing health. He also frequently spoke of the tactics used by the state and wealthy districts, which caused fear and anxiety among the plaintiffs.

During one of the critical stages in this fight for reform, he suffered a major heart attack, with resulting damage plaguing him the remainder of his life. Simon’s unfettered commitment to this cause was evidenced by long working hours, frequent travel, and the constant stress associated with leading a rapidly growing district and participating in a contentious litigation at the same time. Just an hour before his heart attack, he commented to a staff member that his biggest regret in life was not spending more time with his family. Although merely speculation, a reasonable person could conclude that his passion for equity may have been a contributing factor in his health problems.

After the court declared the state finance system unconstitutional, he returned to GMISD only to experience a hostile board of trustees for the duration of his tenure. This is hardly the story of a champion who was highly praised and appreciated for courageous deeds. In the end, however, the district did honor him for his efforts by naming a school after him. Bogotch (2000) stated in this regard that “as with any radical change effort which challenges those holding power, the consequences do not go unpunished. Thus, social justice emerges through martyrdom, with vindication some time in the future” (p. 8).

In this case study, a regressive proposal by the legislature threatened to dismantle the existing school finance system, which provided for funding equity throughout the state. One solution to preventing this slippage was to become an active party to a lawsuit against the state. However, Garcia feared the damage that could result from involvement in this cause in terms of potential state agency responses and in relation to his future opportunities to lead a larger urban system. He also pondered other means to achieve the goal of saving the present equitable school finance system.

According to Marshall and Oliva (2006), “social justice leadership . . . supports leaders’ impulses to transgress, to throw aside the traditional bureaucratic rationality and the limiting conceptualizations of leadership. For example, social justice leaders are outraged when funding formulas leave rural districts floundering” (pp. 7-8). Superintendent Garcia certainly grappled with “traditional bureaucratic rationality” and “limiting conceptualizations” involving his own career advancement and the possible immediate political and personal ramifications associated with filing a lawsuit against the state.

This case involves a superintendent faced with difficult choices brought about by a convergence of events and facts, namely, by a national and state economic crisis, the demographic realities of his district, a historically contentious and divided political landscape of his state, a tradition of leadership for social justice established in his
school system, and his own career aspirations. He has choice options available to him, with the more aggressive approaches likely to produce the desired outcomes but having more severe consequences. As in many instances, there are no clear, black-and-white answers to a dilemma. Superintendent Garcia is operating in wide expanses of gray.

**Teaching Notes**

In respect to preparing future leaders for social justice, McKenzie et al. (2008) suggested that professional preparation programs must raise the critical consciousness among students and faculty members. “A critical consciousness motivates leaders to ensure that schools are safe places for all children and there is a link between academic achievement and activism” (McKenzie et al., 2008, p. 122). They contend that future administrators should possess a “critical consciousness about power, privilege, and inequities in society and schools” (p. 122).

The concept of critical consciousness was illuminated by Pablo Freire in his seminal book titled *Pedagogy of the Oppressed*. Freire (1999) asserted, “To surmount the situation of oppression, people must first critically recognize it causes, so that through transforming action they can create a new situation, on which makes possible the pursuit of a fuller humanity” (p. 29). Peca (1997) further contended, “Critical educators understand that educational problems are really societal problems which can never be solved solely within the schools” (p. 38). This case study offers an opportunity to increase the critical consciousness about one particular issue potentially affecting student performance—equity in school funding.

Also addressing the development of transformative leaders, Cambron-McCabe (2006) emphasized the need to help graduate students gain a wider view and understanding of improving systems. Rather than preparing future administrators with narrow mind-sets that operate within the status quo, a more critical approach is needed. “Educators too often see current practices as neutral and do not examine the appropriateness of the practices or the assumptions that drive them and, accordingly, direct attention to improving the existing practices rather than changing them” (Cambron-McCabe, 2006, p. 121).

This case study exposes students to a superintendent who is confronted with an opportunity, and perhaps a moral imperative, to respond to probable amendments to school finance laws, changes that would be detrimental to the students he serves. In this instance, Superintendent Garcia is not struggling with how the district will fare within the expected status quo but rather with how he can prevent the changes from occurring.

To develop a greater critical consciousness among potential leaders (Freire, 1999; McKenzie et al., 2008; Peca, 1997) and to assist students in gaining a capacity for interrogating the status quo (Cambron-McCabe, 2006), several teaching strategies are offered in respect to this case study. These include the assignment of relevant foundational readings, mock trials, invited guest speakers who were actual participants in these cases, teleconferencing, face-to-face classroom activities, and online methods.
It is suggested that students be asked to first read literature related to leadership for social justice and also work associated with school finance equity and reform, such as some of the pieces cited in this article (Adams et al., 1997; Bogotch, 2000; Cambron-McCabe, 2006; Cardenas, 1997; English, 2005; Freire, 1999; Marshall & Oliva, 2006; McKenzie et al., 2008; Oliff & Johnson, 2010; Peca, 1997; Schulte et al., 2009; Sepe & Roza, 2010; Theoharis, 2007). This preliminary reading will provide a foundation for better understanding of the case study by exposing students to conceptual and substantive issues and ideas related to this subject, thereby elevating their critical consciousness.

Following these preparatory readings, one instructional approach that may foster a greater understanding of this case study would be a mock trial (Vile & Van Dervort, 1994). If properly planned and structured, mock trials can be beneficial student-learning experiences. In this instance, students could be assigned to represent the plaintiff and defendant sides of a school finance case and to play other courtroom roles. They would be asked to thoroughly research the pleadings of and evidence presented by each party in past litigation and to participate in a mock trial.

A number of states have experienced this course of litigation, so students could be assigned a particular case, or the instructor may allow them to choose one from the available literature on the topic (Burch, 2000). Students could also access current databases to gain the necessary information to conduct a “fresh trial” on this subject. These activities would represent a form of data collection for analysis and subsequent presentation that is an effective method for teaching social justice recommended by Hafner (2010). This process would also afford opportunities for students to gain a critical consciousness relative to school funding equity. Aspiring leaders would gain a deeper and broader understanding of the substantive issues involved in these proceedings and may in the process better grasp concepts and meanings associated with transformative leadership.

Several school leaders involved in the fight for school finance reform in Texas remain available for interaction with students about this topic. For instance, Tomas Ortega is currently employed in the educational system and Phil Edwards (pseudonym) is now retired from the superintendency of a participant property-poor district but does make appearances in leadership preparation classes from time to time. Tom Lovejoy (pseudonym), the lead attorney for the plaintiffs, continues to advocate in many forums for an array of worthy causes.

One of the authors has had Ortega and Edwards speak to his graduate students. They both live in the vicinity of his university and willingly make appearances. Faculty members in other locations could identify key players involved in school finance proceedings and invite them to participate in seminars, presentations, and class discussions regarding this case study and related topics.

Teleconferencing might be a helpful tool in bringing participants to classrooms throughout the country, particularly in regions where the distance between the potential guest speaker and university is problematic. These perspectives from the field articulated by the major actors will help students gain a greater understanding of these
issues and illuminate the topic beyond the scope of journal articles, texts, and secondary accounts provided by faculty (Burch, 2000).

In addition to the cognitive aspect of social justice action, transformative leadership also clearly has emotional and spiritual dimensions. As stated earlier, Tomas Ortega (D. Schulte, personal communication, March 3, 2011) revealed that Cardenas (1997) was “his guru on school finance, not only intellectually, but spiritually.” Phil Edwards, the retired superintendent from a participant property-poor district, addressed one of the author’s graduate classes on this subject. Toward the end of his recollections, he broke down and cried. Students were visibly touched by his honest emotions. These accounts suggest that social justice leadership is about both heart and mind. Hafner (2010) stated that in teaching leadership for social justice, there should be balance between “the cognitive and emotional components of the learning process” (p. 203).

This case study could be used in both face-to-face and online formats. For instance, after background reading is completed, students could be asked to review this case study before a particular face-to-face meeting. Students could then be assigned to small groups for unstructured, open discussion to be followed by the instructor’s directed dialogue about various issues and questions raised in this case study.

It also lends itself to an online or hybrid learning format. For example, after reading this piece, students could respond to discussion board questions or participate in structured and scheduled chats regarding the various aspects of the case study.

Some guiding questions appropriate for use in face-to-face settings and online formats are suggested below:

1. “Washing one’s hands of the conflict between the powerful and the powerless means to side with the powerful, not to be neutral” (Freire, 1985, p. 122). If Garcia elects not to join the lawsuit, do you believe he would be siding with the powerful? Discuss your response.
2. Is Superintendent Garcia faced with an “either or proposition” in regard to his participation in the lawsuit? Discuss the other options to address this situation that Garcia contemplated? If he elected different alternatives for advocacy short of litigation, would he maintain fidelity to his social justice agenda or would he be sacrificing the true good of the whole for selfish interests?
3. In 30 years, when one of Garcia’s successors gazes at his portrait, what do you think they will imagine about his leadership? What decision do you believe he should make in this case? What course do you believe he will take in this instance? Why?
4. What examples can you think of in which leaders are discouraged from pursuing worthy causes due to fear of retaliation? Explain? How would you reconcile the need to advocate for social justice with the possible consequences of related action?
5. Do you believe leaders should adopt a “strategic” approach to decision making in relation to social justice in which they may dismiss their values regarding...
one cause to be a viable player in what they consider to be future “larger and more important” arenas?

6. According to Marshall and Oliva (2006), “Social justice leadership . . . supports leaders’ impulses to transgress, to throw aside the traditional bureaucratic rationality and the limiting conceptualizations of leadership” (pp. 7-8). Discuss “traditional bureaucratic rationality” and “limited conceptualizations of leadership” that may be evident in this case?

7. In light of this case, do you believe leaders for social justice are more inclined to be produced through academic preparation, by life circumstances or by professional experiences? Explain your rationale?

8. Bogotch (2000) contended, “Thus, social justice emerges through martyrdom, with vindication some time in the future” (p. 8). Based on the information offered in the case study, would this statement apply to Simon Morgan’s and Tomas Ortega’s experiences? Why or why not?

9. Case studies are inherently limited in terms of the information conveyed about people and events. What additional information would be helpful in this case study to more insightfully respond to the above questions?

10. Schulte et al. (2009) asserted, “Our institutions profess democracy and equity, but are often uncomfortable when citizens pursue these ends in a direct way and may be inclined to suppressive action” (p. 231). In addition to the suppressive actions addressed in this case, discuss other examples of intimidation, retaliation, or suppression that may have resulted in response to acts of social justice?

11. The authors suggest that social justice leadership is about both heart and mind. Discuss your view on this assertion.

12. In addition to school finance equity, what are some of other current causes that call for leadership for social justice?

School finance equity is but one item that can be considered on a social justice leader’s agenda. This case study could be additionally used as a bridge to equally important causes. For example, current federal and state accountability policies have been questioned in terms of equity and their adverse effect on special populations, such as the performance gaps between White, affluent students and minority, English language learners, and low–socioeconomic status subgroups. These disparities can be attributed to a great extent to educational barriers brought about by the demographic realities of particular regions and educational readiness (Batalova & Fix, 2010; Berger, 2010; Collier & Thomas, 2004; Fry & Gonzales, 2008; Popham, 1999; Tienda, 2009; White, 1982).

Closing Thoughts and Reflections

One of the author’s of this case study enjoyed the transformative experience of being involved in the fight for school reform in Texas as one of Simon Morgan’s staff members
responsible for government relationships. He eventually moved on to succeed Simon as superintendent of GMISD in 1997 and served in this capacity until 2002. This author was a witness to many of the real events described in the study and maintained a close relationship with Simon until his death in 2002. Having long-term aspirations for work in higher education, the author left public education in 2005 for a university faculty position, where he remains today.

As the author engaged in his new realm of academia, he was exposed to readings that conceptually framed the courageous and moral work of Simon Morgan, Tomas Ortega, and the others. During Morgan’s and Ortega’s tenures, the words “transformative” and “leaders for social justice” were not in vogue. Simon and Tomas simply did what they thought was right, with children foremost in mind, not detracted by probable consequences and without an identifying label to describe their style of leadership. And during the process, this author gained a critical consciousness (Freire, 1999; McKenzie et al., 2008) of the disparities between rich and poor districts in Texas and, at the same time, a heartfelt appreciation for the selfless individuals who championed the cause.

Bringing this experience and a resulting passion for social justice to the professoriate, it was quite surprising to the author that the literature on the topic that he read and symposia on the subject that he attended did not more directly and explicitly address the struggle for school finance equity in the social justice context. At one particular weeklong meeting on the subject attended by educational leaders from across the nation, when the author mentioned school finance reform, he commonly encountered blank stares and at the most, polite and quickly fleeting gestures of interest. This case study, in part, is an effort to suggest that this important cause is one deserving of more deliberate attention in this field of inquiry.

The present economic crisis indeed presents opportunities on many fronts to dismantle progressive policies that promote social justice, such as reform measures that brought about prekindergarten programs and teacher experience equity (Oliff & Johnson, 2010; Sepe & Roza, 2010). As available funding sources decrease, the possibility of slippage and policy regression increases. Thus, hypothetical Superintendent Garcia was introduced as a leader who must grapple with potential equity problems brought about by his particular state’s economic woes. Through Garcia, this case study also raises important questions regarding the relationship between personal ambition and leadership for social justice and the fear associated with the possible consequences of advocacy. Furthermore, it implicitly speaks to the vigilance required to maintain gains achieved through past social justice action.

**Epilogue**

This author is proud that his portrait currently hangs on the wall near Simon Morgan’s in GMISD’s central office. As stated in the case description, GMISD named a school after Morgan. This action was taken during the author’s tenure as superintendent and a short time before Simon’s death. After the board meeting in which this campus was
so designated, the author phoned Simon at the hospital to share the good news. An uncharacteristically emotional and weak-sounding Morgan said that this honor was the greatest gift he could leave his children. As the author walked to his car that evening after this heartfelt conversation, he realized that Simon Morgan bestowed an even greater gift on future generations of millions of Texas children in helping them realize “a fuller humanity” (Freire, 1999, p. 29).

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References


**Bios**

**Don P. Schulte** is a member of the faculty in the Department of Leadership and Foundations at University of Texas at El Paso (UTEP). Prior to his work at the college level, he spent 27 years in public education and held many different positions, including teacher, assistant principal, principal, curriculum director, assistant to the superintendent for government relations, assistant superintendent for instruction, and superintendent of a Texas school district. He received the 2001 Outstanding Dissertation Award for the Social and Behavioral Sciences from
the UTEP and the 1991 Gold Nugget Award, which recognizes the accomplishments of UTEP Alumni.

**Barbara S. S. Hong** is an associate professor of education in the Department of Education, Human Development, and Social Sciences at Penn State Altoona. She obtained her doctorate from Columbia University with a focus on policy and administration. She is a Fulbright Scholar and an international consultant on disability and advocacy issues. She holds special education and administrative certificates.