

Sexual Diversity and Institutional Change: Exploring the Process of Changing Education
Systems in Alberta and Newfoundland/Labrador

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A Thesis

In the Center for Interdisciplinary Studies in Society and Culture (CISSC)

Presented in Partial Fulfillment of the Requirements

For the Degree of

Doctor of Philosophy (Humanities) at

Concordia University

Montreal, Quebec, Canada

July 2023

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**CONCORDIA UNIVERSITY
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Abstract

Sexual Diversity and Institutional Change: Exploring the Process of Changing Education Systems in Alberta and Newfoundland/Labrador

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This dissertation explores how Alberta and Newfoundland/Labrador gradually changed their education systems from laggards to leaders in the context of sexual diversity. I demonstrate how these changes occurred by integrating historical institutionalism and human geography. From historical institutionalism, I draw from theories of gradual institutional change to show how policy change in each province was a continuous process that occurred over a period of time. I draw from policy feedback theory to explain how these changes happened. More specifically, I use explaining-outcome process tracing to identify policy feedback mechanisms, which provide a detailed account of policy change within the political and historical context of each province, including the networks of social relations involved and the scales from which they emerged. From human geography, I draw from theories of place as relational to theorize provincial educational policy-making as a locality in which various networks of social relations from different scales converge and negotiate how to create safe school spaces for sexually diverse students. In this way, I illustrate how the feedback mechanisms and relevant networks of social relations interact and become institutionalized through provincial educational policy-making. Applying this framework to provincial education policy, I demonstrate how Alberta and Newfoundland/Labrador's education system gradually changed through a policy feedback process. This framework makes two theoretical contributions. The first contribution is by identifying policy feedback mechanisms to make visible the process of gradual institutional change. The second contribution is by integrating policy feedback mechanisms with place/locality as relational to demonstrate how a multi-scalar right is localized as different networks of social relations converge to negotiate how to enact this right.

Acknowledgements

I would like to thank my primary supervisor, Dr. Stephanie Paterson, who has supported me from the beginning. Her guidance and support have been invaluable throughout my PhD program, and her patience and kindness have helped me overcome many difficult periods. I would also like to thank my committee members, Dr. Francesca Scala, Dr. Meghan Joy and Dr. Julie Podmore for insightful feedback that helped shape the direction of my thesis.

I would like to thank my interview participants who contributed their time and knowledge to this project. I would also like to thank them for their dedication to improving the lives of 2SLGBTQ+ students.

I would also like to thank SSHRC, FRQSC, and the School for Graduate Studies for their financial support.

Finally, I would like to thank my children for their support and patience during this academic journey.

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Introduction:

Sexual Diversity and Institutional Change: Exploring the Process of Changing Education Systems in Alberta and Newfoundland/Labrador

The most alarming descriptions regarding why GSAs are needed in Alberta schools were depictions by some Alberta students of physical abuse and beatings in schools, especially directed toward LGBTQ students. Various forms of emotional and psychological abuse were also described and include name calling, widespread use of slurs, isolating behaviours, shunning, and exclusion from school events. [...] These harms were noted to occur in public, separate, and private schools, in urban and rural environments. (RMCLA, 2015: 14)

So, all of this entrenched homophobia in our school systems was huge, it was virulent, [...] I remember once early on in our Pride parade where there would only be 25 of us, there would be 1 or 2 teachers in the Pride parade with brown paper bags over their heads with the eyes cut out [...] they were doing that to show how insidious our education system was because they could be fired with no recourse to any human rights legislation, (NL MHA personal interview)

School environments continue to be unsafe for sexually diverse students¹ despite legislation that protects against discrimination based on sexual orientation and despite policies that aim to create safe school environments. Currently, in Canada, there has been a rise of anti-LGBTQ+ hate, which coincides with the alarming rate of recent anti-LGBTQ+ legislation passed in the United States (Yourex-West, 2023). For example, recently there was anti-LGBTQ+ backlash against a school in Newfoundland holding Pride events. The backlash was instigated by far-right social media accounts claiming that the events ‘indoctrinate’ children (Roberts, 2023). Since accessing safe school environments continues to be a concern for sexually diverse students, then understanding how provincial education policy has changed to address this issue is important.

As the above passages demonstrate, Alberta and Newfoundland/Labrador have a history of institutional homophobia within their education systems, with religion playing a prominent role. These two provinces resisted granting human rights protection to sexually diverse communities despite the recognition of this right in the Canadian Charter of Rights and Freedoms (henceforth the Charter) and the Canadian Human Rights Act. As discussed below, there were court decisions in both provinces that ‘read in’ sexual orientation to their respective human rights legislation prior to amending their legislation. As this dissertation illustrates, this resistance was partially tied to their respective education systems. While these policy legacies continue to impact each province’s education system, both provinces overcame the institutional constraints to introduce initiatives that exemplified best practices for creating safe school environments for sexually diverse students, making them leaders in this context. For example, Alberta introduced comprehensive GSA legislation, while Newfoundland/Labrador initiated a government-led initiative to educate teachers and administrators in the province regarding LGBTQ+ issues. This was the first initiative of this kind in Canada. Therefore, the question that guides this dissertation is, how did Alberta and Newfoundland/Labrador’s education system change from laggards to

¹ At times I will use LGBTQ+ when referring to a policy and/or programs that includes gender and sexual diversity; however, my focus in this dissertation is on sexually diverse communities.

leaders in the context of provincial education policy and sexually diverse students? How I have conceptualized each province as laggards and leaders² is discussed in chapter 3, and expanded in the case study chapters.

To address this question, I integrate historical institutionalism (HI) and human geography to demonstrate how each province gradually changed its education system through a policy feedback process. Historical institutionalism explores how temporal processes change political and economic institutions (Fioretos et al., 2016; Steinmo, 2008), as well as how institutions constrain actors, as well as provide opportunities for change (Lowndes and Roberts, 2013; Thelen and Conran, 2016; Thelen and Steinmo, 1992). Since the issue of creating safer school environments for sexually diverse students is a contentious policy issue, an institutional approach will exemplify how policy change occurred despite the constraints of a homophobic education system, particularly how this process of change occurred over time.

Context: Educational Policy Change and Sexual Diversity in Alberta and Newfoundland/Labrador

In Alberta and Newfoundland/Labrador, there was no legal protection for sexually diverse communities until the end of the twentieth century. In Alberta, legal protection began in 1998 when the Supreme Court of Canada ruled in the case of *Vriend v. Alberta* that excluding sexual orientation from Alberta's human rights legislation was a violation of the Canadian Charter of Rights and Freedom. From this time, the Alberta human rights commission was able to accept cases of discrimination related to sexual orientation. However, this ruling was met with inflammatory reactions within the province. A moral panic ensued, fueled by the weekly magazine, the *Alberta Report* (Filax, 2004). Furthermore, Ralph Klein, who was premier at the time, debated using the notwithstanding clause that allows governments to overrule the court's decision (Kelly, 2001: 235).

While Klein did not use the notwithstanding clause, Alberta's human rights legislation was not officially amended to include sexual orientation until 2009. When this amendment was made, section 11.1 was also added to the legislation, which allowed parents to remove their child from discussions on sexuality, religion and sexual orientation. (Rayside, Sabin and Thomas, 2012: 11). As chapter 4 will demonstrate, this decision was made to appease faith-based parents who were concerned they would be forced to teach their children curriculum that conflicted with their religious beliefs.

In Newfoundland/Labrador, amendments to human rights legislation were not made until 1997 despite the 1995 Newfoundland/Labrador Superior Court ruling that read in sexual orientation to its legislation (Warner, 2002). This amendment was significant for education in Newfoundland/Labrador because, according to *The Telegram*, it could be used as a tool for homophobia education in schools (Onishenko, 1997), especially once Newfoundland/Labrador's denominational education system ended in 1998. Newfoundland/Labrador's history of a multi-denominational education system played a fundamental role in creating systemic homophobia within the education system. For example, according to the *New Maritimes Editorial Council*, in

² Chapters 4 and 5 illustrate how both provinces emerged as leaders in creating safe school environments for sexually diverse students; however, it is important to note that the current Alberta government has rolled back some of the changes, and that neither province is now a leader. The importance of this question is how change happened from one position to the other.

1991, Justice Minister Paul Dicks argued that adding sexual orientation to the human rights legislation would violate the Newfoundland's Terms of Union because Term 17 guaranteed a denominational education system (Barnholden, 1993). With the churches in control of education, many sexually diverse teachers were afraid of facing discrimination and job loss (Shortall, 1998) and sexually diverse students were hidden.

Term 17 was amended in 1998, thereby creating opportunities to address homophobia in schools. For example, in 1998, the organization, Newfoundland Gays And Lesbians For Equality launched a Homophobia Awareness Project in Newfoundland/Labrador junior high and high schools. This project was funded by the Provincial Strategy Against Violence (see chapter 5 for discussion on PSAV) (Muscheid, 1998). While Alberta and Newfoundland/Labrador are not the only provinces that have homophobia within their education systems, as mentioned above, these two provinces resisted granting human rights protection to sexually diverse communities; therefore, delaying protection for sexually diverse students in education.

The issue of homophobic violence in schools first received attention after a nation-wide survey was conducted in 2009 by Egale Canada in collaboration with academics to question the experiences that both gender and sexually diverse students encounter in their school environments. What the study revealed was that many students continued to hear homophobic and/or transphobic comments daily (including comments directed at heterosexual students). The study also showed that while gender and/or sexually diverse students experienced high rates of sexual harassment, there were varying amounts of verbal and physical harassment (Taylor and Peter, 2011: 15-18). The final report recommended anti-homophobia policies in schools, as well as in teacher education, LGBTQ+ inclusive curriculum, supports for starting gay-straight alliances (GSAs), and support for LGBTQ+ students in schools (Taylor and Peter 2011). A more recent follow-up survey by Egale Canada indicates that violence continues (Egale, 2018).

Regarding Alberta and Newfoundland/Labrador, the response to Egale's survey results differed. As chapter 5 will demonstrate, this survey had a profound impact on working towards creating safe and inclusive school environments for sexually diverse students in Newfoundland/Labrador. In Alberta, the results did not have the same impact as there continued to be resistance both from faith-based parents and schools, as well as Progressive Conservative (PC) and Wildrose Members of the Legislative Assembly (MLAs). As chapter 4 demonstrates, debates on GSAs were not introduced in the Alberta legislature until 2014. Despite these different responses, both provinces emerged as leaders in creating safer school environments for sexually diverse students. For Newfoundland/Labrador, this happened in 2012, and for Alberta, in 2017.

Theorizing Educational Policy Change and Sexual Diversity

Institutions influence policy decisions as they can both constrain and empower policy actors in their decision-making. Moreover, institutions are also shaped by external factors, including politics, external events, as well as history (Lowndes and Roberts, 2013). Therefore, drawing from historical institutionalism will help answer the question of how each province changed their education systems despite the institutional constraints and policy legacies. From HI, I draw on theories of gradual institutional change and policy feedback.

Applying this framework to provincial education policy, I demonstrate how Alberta and Newfoundland/Labrador's education system gradually changed through a policy feedback

process. Policy feedback is when existing policies influence future politics and policy (see Béland et al., 2022). In Alberta, gradual change happened through policy drift, which is when policies remain the same despite changes in the social and economic environment (Hacker, 2005). In Newfoundland/Labrador, I illustrate that the education system changed through policy layering, which is when amendments are made to existing policy (see Streeck and Thelen, 2005). Chapter 2 will expand on the concepts of policy drift and layering.

To explain how these changes happened, policy feedback mechanisms were identified. In other words, policy feedback theory was used to provide more detailed account of how gradual change happened within the political and historical context of each province, which networks of social relations were involved, and the scales from which they emerged. The use of policy feedback in this way allows me to address the limitations of observing gradual institutional change (see Rocco and Thurston, 2014). More specifically, I use process tracing to identify the policy feedback mechanisms that help explain how gradual policy change happened (see chapter 3). I identify social-political mechanisms, informative/interpretive mechanisms, as well as power reproduction mechanisms (see chapter 3).

I focus on provincial education policies because they provide an interesting case for studying institutional change for at least three reasons. First, Canada is a federal state in which policy jurisdictions are divided between provincial and federal government with education under provincial jurisdiction (Wallner, 2014). This means that there are multiple education systems to examine and compare. Second, since each province has its own history as well as political and public administration systems (Atkinson et al., 2013; Bourgault and Dunn, 2014), it is expected that there will be differences in education systems. These differences are a reflection of political conflicts in each province (Wallner, 2014: 25) and how they become institutionalized. Finally, education policy is a provincial responsibility; however each provinces' education act must meet the equality standards in the Charter. In this way, different scales interact and shape how sexually diverse students are included in education policy. As a result, how these rights manifest in educational policy differs (Rayside, 2014; Walton, 2004). What this means is that even though each of these jurisdictions must meet the same Charter requirements, how policies are formulated and designed within the political and historical context of each province determines how these requirements are met.

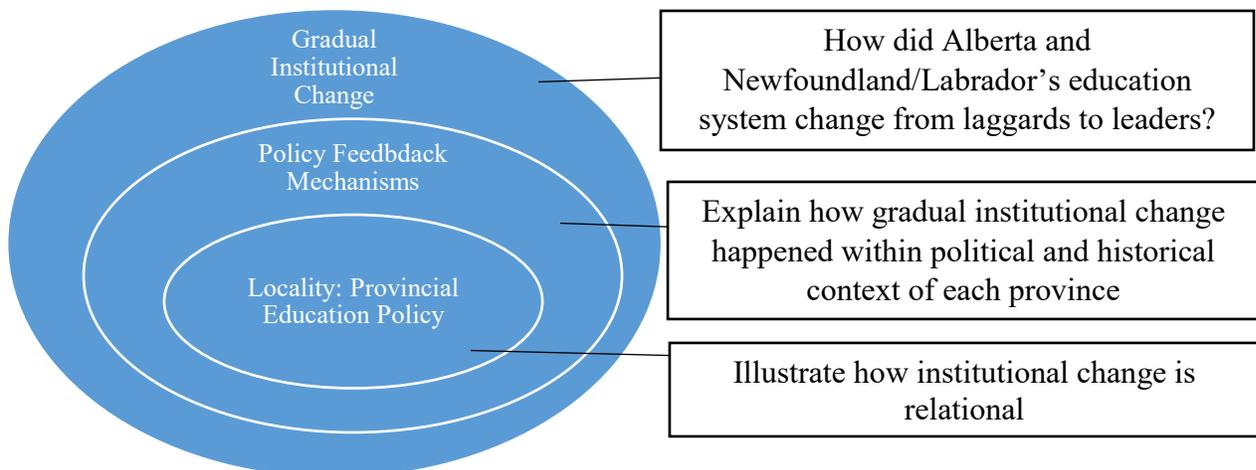
Therefore, while institutions influence policy decisions, they are also shaped by interacting social relations from different scales. For example, education systems consist of multiple scales (provincial, regional, local), and there are different interactions and power dynamics at these different scales. I focus on the provincial scale because this is where the debates and negotiations from different parts of the province interact. My interest in scale is in the *interactions* of various networks of social relations from different scales and how these interactions are institutionalized through provincial educational policy-making. In other words, how institutional change is relational. Therefore, my second research question is how do multi-scalar relations converge on spaces of policymaking, and to what impact? Human geography provides insights into this question, particularly theories of place/localities as relational.

In particular, I draw on the conceptualization of place as relational to theorize provincial educational policy-making as a locality in which different networks of social relations converge to negotiate how to create safe and equitable access to school environments for sexually diverse students. I theorize provincial policy-making in this way because as per Doreen Massey (1993), a

feminist geographer, places/localities are constituted through the interactions of various networks of social relations from different scales that come together at a particular point. She refers to this conceptualization of place/locality as a ‘global sense of place’, which is continuously changing because the networks of social relations also changes (See chapter 2). Moreover, Streeck and Thelen (2005) conceptualize social institutions as ‘being continuously created and recreated by a great number of actors with divergent interests, varying normative commitments, different powers, and limited cognition’ (16). Therefore, considering that gradual institutional change occurs over a period of time and is continuously being created and recreated by numerous actors, theorizing provincial educational policy-making as a locality in which networks of social relations from different scales, both internal and external to the province, converge and interact will provide a dynamic view of how institutional change gradually occurs.

Figure 1 illustrates how theories of gradual institutional change, policy feedback, and locality are layered in a way that each set of theories is a lens to zoom in closer to understand the dynamics of policy change, the actors and institutions involved and how these are institutionalized through provincial policy-making.

Figure 1: Theoretical Framework



Methodological Framework: Causal Mechanisms and Process Tracing

In order to answer how Alberta and Newfoundland/Labrador changed their provincial education policies, I identified the feedback mechanisms that generated policy change. Some scholars define mechanisms as deterministic (Mahoney 2000), while others follow a more realist tradition of causation (see Pawson, 2000) in which the interaction of mechanisms within a particular context generates causation. Therefore, the same mechanism may have a different outcome in different contexts (Biesbroek, Dupuis and Wellstead, 2017; Falleti and Lynch, 2009; Pacquet and Broschek, 2017; Pacquet, 2019; Wellstead, Cairney and Oliver, 2018).

I draw from a realist perspective of causal mechanisms because on the one hand, Streeck and Thelen’s (2005) conception of social institutions draws from a realist approach in which institutions are continuously created and recreated, (16). On the other hand, I theorize provincial

educational policy-making as a locality in order to explain the ways that provincial education policy is continuously changing as a result of a gradual, dynamic feedback process. In this way, I seek to understand and explain in greater detail how policy change happened. According to Bunge (1997), there are three types of theories that explain causation. The first he identifies as ‘black box’ theories, which answer the question ‘what is it?’ He states that these types of theories only identify the inputs and outputs. In other words, dependent and independent variables. Second, a ‘gray box’ theory gives a more superficial answer to ‘how does it work?’ In these types of theories, the intervening variables are identified, but do not provide details regarding the mechanisms of the variables that explain how change happened. The third type of theory, which he refers to as mechanistic or dynamical type of theory is the ‘translucent box’. This type of theory provides greater detail in answering the question ‘how does it work?’, and is the type of theory used by realists (427-428). Therefore, in my study, I argue that identifying policy feedback mechanisms to explain gradual change is a ‘translucent box’ type of theory that can explain in greater detail how policy change happened. Chapter 3 expands on the definition of causal mechanisms used in this dissertation. The way that I will identify mechanisms is through process tracing.

Process tracing is a method used to explore the mechanisms that cause a particular outcome (Beach and Pedersen, 2013), often used for analysis within a case study (Blatter and Haverland, 2014). My research will consist explaining-outcome process tracing, as outlined by Beach and Pedersen (2013). This type of process tracing is an iterative process that looks for all possible causes of an outcome within a particular case. Since I am interested in how mechanisms interacting with context generate outcomes, I will use a deductive and inductive approach, and use empirical data to trace the mechanisms involved.

Since my interest is in gradual institutional change, process tracing is an appropriate method because it is often used in historical analysis to identify the order of events that cause change (Mahoney, 2015: 204). I am interested in identifying the smaller changes that have occurred over a period of time and identifying what caused these changes. Therefore, process tracing will enable me to identify when these changes happened and how. With the understanding that policy-making is not a linear process, I seek to identify the process of policy change. I use the conception of process as a sequence of mechanisms (Falleti and Lynch, 2009; Tilly, 2001). Considering there are multiple contextual layers to consider in a process, such as historical, geographical, political, social, economic and institutional, (Falleti and Lynch, 2009) and that complex systems, such as education systems, involve multiple interrelated mechanisms occurring at different scales (Bunge, 2004: 193), then using process tracing to identify smaller changes will be useful for identifying the feedback mechanisms that generated each change. In other words, I will use process tracing to reconstitute (Pacquet, 2019) how provincial governments in Alberta, and Newfoundland and Labrador gradually changed their education systems.

Outline of Dissertation

Chapter 1 entails a detailed discussion of provincial education policy and politics in Canada, as well as a section on how provincial education policy addresses inclusive education for sexually diverse students. In chapter 2, I develop my theoretical framework by integrating political science and human geography. In this way, I theorize provincial educational policy-making as a locality in which various networks of social relations from different scales converge to negotiate how to create safe and equitable access to school environments for sexually diverse students. By

focusing on provincial educational policy-making as a locality, I illustrate how the interactions of these social relations are gradually institutionalized through a policy feedback process. Chapter 3 discusses the methodological framework, which defines causal mechanisms, includes a typology of policy feedback mechanisms, explains process tracing, and outlines the methods and data collection used in this study. Chapters 4 and 5 are the case study chapters for Alberta and Newfoundland/Labrador. In these chapters, I provide an overview of provincial education policy, as well as the policy feedback mechanisms that were identified in my analysis. In chapter 6, I situate policy feedback mechanisms within theories of gradual policy change to illustrate how policy drift happened in Alberta and policy layering in Newfoundland/Labrador.

Chapter 1: Educational Policy-making and Politics in Canada

Introduction

In Canada, the federal government has a limited role in education. While they have some involvement – Indigenous education, language education, cultural education, supporting research (Fleming, 1991; Levin, 2001), education is a provincial responsibility. Provinces were given power over education under Section 93 of Canada's 1867 Constitution Act (Khan, 1997: 30) in order to protect and maintain religious and linguistic diversity of the provinces, especially in regard to minority groups. For instance, education for Anglophone Protestants in Quebec and Francophone Catholics in the other provinces were protected under the Constitution (Broschek, 2021; Khan, 1997). Since the 1867 Constitution Act, various changes in education have occurred, particularly in the way that education has become a politicized field of social policy, with numerous intersecting relations and interests. As a result, it is imperative that educational policy-making be understood within the social, cultural, political, economic and historical context of each province (Ben-Perez, 2009; Levin, 2001). In this chapter, I will first provide a historical overview of education in Canada, followed by a section on educational governance. I will then discuss the concept of inclusive education and how this manifests in Canada, particularly in relation to sexually diverse communities.

Education in Canada

Education in Canada began as a privilege for children of government officials and members of the military; however, this situation changed in the mid-nineteenth century as compulsory free public education was introduced. This change was due mainly to the efforts of Edgerton Ryerson, who advocated for free education for all children and believed that curriculum should provide guidance for citizenship, prepare students for the workforce and improve the conditions for poor children (Bosetti and Gereluk, 2016). While Ryerson had a huge impact on how we experience education today, he was a proponent of segregated schools, perhaps most notorious for his role in the creation of the residential school system for Indigenous children. In addition, Ryerson was responsible for formalizing the segregation of Black students in Ontario's Common School Act of 1950. This act stated that Black communities could request the creation of a separate school and permitted school boards to create separate Black schools despite objections. Many members of the Black community were not in favour of segregated schools, especially considering these schools did not receive the same level of funding and resources as public schools. Consequently, Black parents unsuccessfully advocated numerous times for desegregation, including by suing school boards (Henry, 2019; McLaren, 2004). Regardless of these efforts, the education system in Ontario was not desegregated until 1965 (Henry, 2019: 4).

Additionally, Ryerson's reforms to educational governance began to move control away from the church and created a more centralized system that gave control to provincial governments (Broschek, 2021; Wallner, 2014). As education became more centralized from the end of the nineteenth century until after World War II, education departments expanded and new responsibilities were added, such as curriculum design and school supervision (Manzer, 1994: 137). Moreover, the idea of what education should be changed throughout the 20th century, especially as Canada became more competitive internationally.

One of the early influences on Canadian education was the American progressive movement in the 1920s, which was based on the belief that education should be child centered

and modernized by introducing new subjects (Bosetti and Gereluk, 2016; Fleming, 1991). However, this perception of education began to change after the Soviet Union launched sputnik in 1957, which was not only a major turning point for education, but also fueled international competitiveness (Bosetti and Gereluk, 2016: 76). As a result of sputnik, the American progressive movement in the United States ended as the US federal government intervened in curriculum reform to increase the competitiveness of American schools. While Canada did not react as strongly as the US, Canada did experience changes as a result (Tomkins, 1981: 164). For instance, provincial governments returned to a more centralized form of governance and placed greater emphasis on subjects, such as math and science (Bosetti and Gereluk, 2016: 73-76).

Education in the 1970s and 80s was affected by the global recession as well as concerns around global competitiveness as parents feared that their children were not receiving the education they needed. Consequently, there were greater demands for higher education at this time (Bosetti and Gereluk, 2016: 77). By 1975, education systems had evolved into a more complex system with more students attending school and education viewed as a means of socialization, as well as addressing social problems, such as reducing crime and discrimination. As a result of this expanded function, new programs were introduced. However, as the global recession of the early 1980s was felt in Canada, government spending became an important issue, especially as governments had difficulty maintaining existing education programs (Levin, 2001: 8-11).

In the 1980s and 90s and continuing into the twenty-first century, education became a highly political issue as governments tried to balance conflicting interests of various stakeholders, such as parents, teachers' associations (Manzer, 1994), principals, administrators, school board trustees, and relevant interest groups. Debates occurred about which social issues to address and what the role of education should be, especially in the context of curriculum policy (Ben-Peretz, 2009). For example, over the years, there have been many public debates about sex education curriculum and whether this is a public or private issue, what is appropriate content for students, who should teach this content (school versus parents), and at what age. In this way, education policy legitimates knowledge and ideologies of certain social groups and classes, especially those who have power (Apple, 2004: 61). It reflects the wider social views, political conflicts (Manzer, 1994; Wallner, 2014) and debates about what is in the public interest (Manzer, 1994: 3) and reinforces inequities in society.

Ideology is not only embedded in formal education policy, but also the hidden curriculum. The hidden curriculum is the daily interactions within school environments that socializes students to become future citizens. For example, enforcing dress codes, structuring the school day, and learning how to take turns when speaking are all forms of hidden curriculum that teach students about what is "appropriate" clothing to wear in public, punctuality and respect for others. Hidden curriculum teaches about students social norms, institutional rules, as well as what is legitimate knowledge (Apple, 2004). Students learn gender norms through daily interactions about what is "appropriate" behavior, dress, and activities for boys and girls. Moreover, heterosexuality is normalized through the hidden curriculum and education policy (Quinlivan, 2002).

One way that heterosexuality is normalized in education is by silencing non-heterosexuality (Mayberry et al., 2011). Silencing may entail excluding and/or marginalizing sexually diverse communities in education discussions. For example, in Alberta's human rights

legislation, section 11.1 allowed for parents to remove their child from discussions related to sexual orientation. This parental opt-out was a way of silencing topics related to sexual diversity and normalizing heterosexuality. Another way that heterosexual ideologies are privileged in education is by depicting sexually diverse students as ‘at risk’ (Quinlivan, 2002). This type of framing suggests that sexual diversity is abnormal. Furthermore, debates over GSAs and whether these are curricular or non-curricular activities creates an environment that marginalizes sexually diverse students. According to Camicia (2016), this type of hidden curriculum fosters discrimination and fear in school environments (71). As the case studies in chapters 4 and 5 will demonstrate, there are numerous ways that education policy and hidden curriculum silences sexually diverse students and normalizes heterosexuality.

Those who have the power to make decisions about education policy or the hidden curriculum also have the power to shape future society and citizens (Camicia, 2016). Therefore, the political environment also plays an important role in educational policy-making. For example, when a new government is elected, policy change may result (Ben-Peretz, 2009: 137) and these changes can be beneficial or they may include rollbacks, which means that electoral politics can both constrain and support policy change. However, there have been critiques about the role that governments have in education, including the need to distinguish between education and partisan interests (Manzer, 1994: 21), which becomes particularly problematic when ideas about education and what students should learn are determined by the interests or priorities of political parties. Not only is education influenced by sources outside of the government, but also by other government departments, who may view education as a means to reduce crime or improve health, as well as opposition political parties who question government decisions (Levin, 2001). In this way, there are numerous interrelations involved with varying and conflicting interests both inside and outside of government; therefore, educational policy changes are a reflection of social (Marton, 2006: 232) and political changes as well as relations within these environments.

Educational Governance Structures

Educational governance in Canada has gone through shifts between more centralized systems with the ministries of education leading the way, to more decentralized systems in which school boards and/or schools have greater autonomy. While my interest is in how different educational scales come together at the provincial scale, it is also important to understand the policy role of school boards and committees since each of these has an impact on provincial educational policy-making. In this section, I will give an overview of the different educational governance structures and how they evolved.

Ministry of Education

Ryerson not only shaped the goals of education in Canada, but he also played a large role in developing and centralizing educational governance, especially by creating a provincial ministry of education in Ontario (Tomkins, 1981). Today, each province/territory has its own ministry of education, which regulates standards, curriculum, and funding, while school boards (more on this below) work with the provincial governments and are responsible for various tasks, such as hiring teachers (Anderson, 2016: 565). This system of central governance and local school boards began prior to Confederation and while all provinces/territories now have a central governance structure with a Minister of Education, the path to this structure was not the same for all provinces/territories.

In Ontario, educational governance began with a civic trusteeship, which was under the control of a board of trustees (Bosetti and Gereluk, 2016; Li, 2015; Manzer, 1994), while main decisions about education, such as funding, were made by the provincial government (Gidney, 1972; Li, 2015). This system began in 1807 when eight public schools were created and trustees were appointed to oversee the governance of these schools. School districts were then created in 1816, each with a board of education and local trustees. The provincial government gave these trustees the responsibility to choose textbooks and make regulations for schools. This system became more centralized when a general board of education was created in 1823 to oversee all schools in the province (Li, 2015: 3); however, the general board had a short life and was abolished in 1833. (Gidney, 1972: 36).

Significant changes occurred with the Ontario School Act of 1843 in an effort to balance local and central control of education. This act left local control of schools with the trustees and created the role of district superintendents to oversee trustees, choose texts, hire teachers and ensure that the schools were properly maintained. Additionally, the position of chief superintendent was created at the provincial level and had the role of overseeing the School Act and reporting to parliament (Gidney, 1972: 36-37). Edgerton Ryerson became the first chief superintendent in 1844 (Li, 2015: 3). Then, in 1846, the School Act moved towards a more centralized system that included both a Board of Education and chief superintendent that was appointed by a governor. Together, the Board of Education and the chief superintendent had the role of making rules for government, choosing textbooks, disciplining schools, certifying teachers and organizing schools. In this way, the power of trustees was reduced and they now had to choose texts from a list determined by the Board of Education and hire teachers as per provisions set out in the School Act. Another significant change was that education was no longer controlled by any religious authority. There were Catholic schools, but they were subject to the same regulations of the School Act as the public schools-formerly the Protestant schools (Li, 2015). The 1846 act met with resistance by many people; consequently, changes occurred once again in 1849 when Malcolm Cameron, a member of the ministry, introduced a new bill that reduced the power of the chief superintendent and central authority by returning control of selecting textbooks and certifying teachers to the local boards of education (Gidney, 1972: 39-41). Further changes occurred in the School Act of 1876 when premier Mowat created a Department of Education (Li, 2015: 3), as well as the position of Minister of Education. Consequently, the position of chief superintendent was abolished after Ryerson's retirement (Wallner, 2014: 136). Central educational governance in the rest of Canada eventually evolved to a similar structure as in Ontario with a Minister of Education and a Department of Education (Manzer, 1994: Wallner, 2014).

In western Canada, Manitoba and the Northwest Territories moved towards a centralized educational governance system similar to Ontario in 1890 (Manzer, 1994; Wallner, 2014) and British Columbia in 1870 (Manzer, 1994). This system continued when Alberta and Saskatchewan were constituted in 1905 (Manzer, 1994). In the Maritimes, central educational governance began under collective ministerial responsibility instead of individual (Manzer, 1994: 80) in order to reduce opposition from civil and religious groups (Wallner, 2014: 136); however, New Brunswick and Prince Edward Island moved towards a system of individual ministerial responsibility in the 1930s and 1940s, and Nova Scotia in 1949 (Manzer, 1994; Wallner, 2014). In other words, the education system was the responsibility of a Minister of Education. Quebec and Newfoundland/Labrador retained their system of religious trusteeship in which education

was under the control of religious leaders (Wallner, 2014: 164). In Newfoundland/Labrador there was a multid denominational school system (Fleming, 1991; Wallner, 2014) and while there was an attempt by colonial administrators in the 1920s to create a department of education, the department was abolished in 1927 because of church resistance (Manzer, 1994; Wallner, 2014). Ensuring that the churches retained control of education was very important for Newfoundland/Labrador; therefore, when they joined Canada in 1949, one of the Terms of the Union, Term 17, ensured that this multid denominational education system would continue and lasted until 1998 when the education system transitioned to a secular system (Heerema, 2005: 113-114). Although Term 17 continued until 1998, changes were made to move towards a centralized form of governance in 1968 when a Department of Education was created and a Minister of Education was introduced (Manzer, 1994; Wallner, 2014).

In the early twentieth century, centralized educational governance shifted to a model in which policy-making was a shared effort between political leaders and senior bureaucrats with advice coming from teachers' organizations and trustees. In particular, deputy ministers, who had previously had careers in education, had considerable control over administration in the departments of education; however, this was reduced after World War II so that deputy ministers could focus more on their role in policy-making (Manzer, 1994: 135-138). While numerous changes in education occurred over the years, school boards have continued to be an important part of this overall structure, particularly the ways that their relationship with provincial governments have evolved.

School Boards and School Councils

School boards have an important role in education, especially since they are considered agents of provincial government and are regulated by provincial education legislation (Khan, 1997). School boards are legal bodies that are managed by elected trustees (Galway et al., 2013; Khan, 1997). In this way, trustees do not have authority on their own, but collectively carry out the mandates of the board and make decisions as a board (Sheppard et al., 2013: 10). School boards perform administrative and financial functions, including creating school board policies (Khan, 1997), creating decision-making processes, deciding how to distribute resources and (Galway et al., 2013) ensuring students receive appropriate educational services (Lessard and Brassard, 2006). Despite the importance of school boards, their autonomy has declined as provincial governments have centralized authority and decision-making in education (Levin, 2005: 54).

The primary means of shifting the power to provincial governments has been by consolidating school boards. In the nineteenth century as school development and attendance increased, many small school districts were created in all provinces. Since the early twentieth century, there have been various attempts at consolidating these districts in order to reduce the number of districts. (Fleming, 1991: 191). This trend of consolidation became particularly notable in the 1990s in all Canadian provinces (Jaafar and Anderson, 2007; Sheppard et al., 2013; Sheppard and Galway, 2016) with the rationale that reducing the number of school districts would make the remaining ones more efficient and it would reduce cost. However, there was resistance to these changes as school boards advocated for greater autonomy (Jaafar and Anderson, 2007: 214). Additionally, changes to educational legislation not only reduced autonomy of school boards and gave greater control to the provincial governments, but also increased school board accountability regarding student learning (Shepard et al., 2013; Shepard and Galway, 2016). As a result of these changes, school districts are now responsible for larger

geographical areas with fewer trustees while serving a greater number of students who have different needs. At the same time, there have been instances in which provincial governments have intervened in school board decisions and in some cases, overturned those decisions (Sheppard et al., 2013: 2-3).

One important way that provincial governments maintain control over education, including school boards, is through funding (Galway et al., 2013; Sheppard et al., 2013). For example, during the 1980s and early 1990s, school districts, in order to supplement the funding they received from the provincial government, raised their own taxes; therefore, they had more money and flexibility for their districts (Jaafar and Anderson, 2007; Manzer, 1994). However, this system changed in the late 1990s and early 2000s as many provincial governments tried to standardize funding using a formula-based funding model (Galway et al., 2013; Jaafar and Anderson, 2007; Sheppard et al., 2013) with the rationale that this type of model would ensure equity in programs and services in all schools and districts regardless of location (Jaafar and Anderson, 2007: 215). Consequently, decisions about how education funds are used are made more at the provincial level where the majority of the funding for education now originates (Galway, Wiens and Brown, 2013; Jaafar and Anderson, 2007; Levin, 2005; Sheppard et al., 2013; Vergari, 2010).

Along with the consolidation of school districts, provincial and territorial governments mandated the creation of school councils, which are under provincial/territorial legislation and government control (Jaafar and Anderson, 2007: 214). School councils, which began in the 1980s (Wallner, 2014) are constituted by elected and appointed members (Sheppard and Galway, 2016: 6), who include mostly parents and community representatives (Jaafar and Anderson, 2007; Sheppard and Galway, 2016; Sheppard et al., 2013). These councils were created to encourage parental involvement in school decision-making; however, they have been primarily reduced to an advisory function without any real decision-making power (Jaafar and Anderson, 2007; Sheppard and Galway, 2016; Sheppard et al., 2013).

Pan-Canadian Governance – the Council of Ministers of Education, Canada

Educational policy decisions not only consider the needs of the province, but they also consider decisions and educational ideas from other provinces/territories (Wallner, 2014). In particular, provincial governments coordinate and discuss educational policy issues through intergovernmental institutions. One important intergovernmental education institution in Canada is the Council of Minister of Education, Canada (CMEC), which developed out of the Canadian Education Association. The CMEC serves as a national voice for education in Canada while maintaining provincial jurisdiction in education. (Wallner, 2014). This section will provide a brief overview of the evolution of the CMEC and its role in education.

The first type of intergovernmental body that was developed to discuss common education issues in Canada was Educational Association of the Dominion of Canada (DEA), which was founded in 1891. The DEA was created with the goal of bringing together different policy actors - both government and non-government - with an interest in education to work towards creating a common education system in all provinces/territories. In 1918, the DEA became the Canadian Education Association (CEA) (Wallner, 2014: 124-125). Within the CEA, a Standing Committee of Ministers was created because the Canadian Teachers' Federation was criticizing the provincial education systems, stating that they were not adequately preparing students. The Canadian Teachers' Federation then stated that a federal minister of education was

needed to coordinate education policy across the country. Therefore, the role of the Standing Committee of Ministers was to bring together education ministers from all provinces/territories to work together on creating a coherent education system in Canada, while ensuring that the provinces retained control over education (Wallner, 2014: 186). The Council of Ministers of Education, Canada (CMEC) evolved from this standing committee (Allison, 2007: 114).

The Council of Ministers of Education, Canada (CMEC) was founded in 1967 by provincial/territorial ministers of education along with an advisory committee composed of deputy ministers who made recommendations to the ministers (Manzer, 1994: 202). The CMEC developed primarily to prevent interference from the federal government in educational matters as well as coordinate educational leadership (Wallner, 2014: 185). Some of the goals of the CMEC were to provide a place to discuss education issues, construct and work on common educational goals, consult with the federal government and to represent education interests at the international level (CMEC, 2022). Regarding international representation, the Ministers of Education made a deal with the Department of External Affairs that the head of the CMEC would be appointed as Canada's representative on education matters (Wallner, 2014: 185-186).

The CMEC participated in education policy in various ways. Some of its functions entail administering the Official Languages Program, managing pan-Canadian student assessments, working with Statistics Canada to provide education statistics (Vergari, 2010: 540), as well as prioritizing Indigenous education (Anderson, 2016: 577). The CMEC also released two important documents that demonstrated the provinces' willingness to work towards common goals: 1993 Victoria Declaration and the Learn Canada 2020. In 1993 the premiers adopted a position stating that they fully supported the leadership of the CMEC and that they supported the CMEC as a national voice for education. The Victoria Declaration was a joint statement by the ministers of education in response to this endorsement and declared that the CMEC would focus on the themes of quality of education, accountability, accessibility, and mobility and listed an action plan on how to achieve these (CMEC, 1993). Learn Canada 2020 was a framework for improving education systems in each province. The framework identified goals to be pursued by the ministers of education in each province under four pillars. These goals included providing access for all children to early childhood development, providing inclusive teaching and learning opportunities for all children in elementary and secondary school, increasing the quality and accessibility of postsecondary education and improving adult learning. (CMEC, 2008). In this way, the CMEC ensures that there is some coherence in how provincial education systems are governed, the policy issues prioritized and the decisions made. Additionally, the CMEC provides leadership regarding inclusive education.

Inclusive Education in Canada

In Canada, inclusive education initially meant ending the separation of students with disabilities and integrating them into a mainstream classroom, but has evolved to include differences based on race, sexual orientation, gender, culture as well as many others (Mackay, 2009: 39). In other words, inclusion aims to ensure that all students have equal access to quality education (Anderson, 2016:574). According to Mackay (2009), inclusion is about a sense of belonging and promoting equality and diversity in schools (40). In the context of the Charter, inclusion is a reflection of the equality section, Section 15, which protects against discrimination, including discrimination based on sexual orientation (Mackay, 2009; Miesera and Gebhardt, 2018). For this reason, this section will provide an overview of inclusive education in Canada and then focus

more specifically on the measures that ministries of education and school boards apply to create inclusive school environments for sexually diverse students.

Two important organizations that have contributed to the creation of inclusive schools are teachers' associations across Canada and the CMEC. When provincial governments began to focus on inclusive education in the mid-1980s, teachers were not consulted about how to integrate students with different needs in the classroom, especially regarding the impact on workload. Instead, government officials assumed that teachers would welcome these children and perceived this action as cost-effective since it would reduce the number of personnel required. In other words, inclusion was not something that would benefit students and ensure that they had equal access to education. Teachers' associations responded by becoming advocates for these students and inclusive education and collaborated with allies who had an interest in this topic to decide how to approach the issue (Winzer and Mazurek, 2011). This type of response by teachers' association was not uncommon, especially since Canadian teachers' association have a history of engaging in social justice issues (Rottmann, 2008; Winzer and Mazurek, 2011: 16). For example, teachers have advocated for various marginalized members of their communities as well as teachers in other provinces/territories (Rottmann, 2008: 986).

Another important organization for inclusive education in Canada is the CMEC. For example, under Canada Learn 2020, which was a framework created by the CMEC, provincial governments worked towards programs to ensure equal access to education for all students, including through initiatives such as providing funding for students at risk of exclusion (Anderson, 2016). In 2015, the United Nations member states adopted the 2030 Agenda for Sustainable Development, which is a global initiative with seventeen Sustainable Development Goals (SDG). One of these goals, SDG 4, 'ensuring inclusive and equitable quality education and promoting lifelong learning for all' is pursued by the provinces and territories through the CMEC (CMEC, 2020). As a result of Canada's and the CMEC's commitment to inclusion, each province has developed education policies to integrate inclusion in their schools (Anderson, 2016).

Some of the ways in which inclusive education is applied in the context of sexual diversity include creating anti-bullying policies that address homophobic/transphobic violence, safe school policies aimed at creating safe and welcoming school environments, creating GSAs, and including sexually diverse issues in curriculum (Taylor and Peter, 2011). However, these efforts continuously meet with resistance by religious schools/school boards and parents.

Inclusive Measures for Sexually Diverse Communities

Tensions surrounding issues of sexual diversity, including in the context of education policy, GSAs, inclusive curriculum and safe school/anti-bullying policies, are often focused on the one hand, on equality and non-discrimination claims and, on the other hand, religious claims. Both of these arguments are situated in the Charter. However, most Charter cases have not permitted religious claims to infringe on the rights of gender and sexually diverse communities (MacDougall and Clarke, 2012: 207). One example is the case of *Chamberlain v. Surrey*³, in which the Surrey school board banned books related to sexually diverse families. The board claimed that these books presented sexually diverse families positively, which would offend religious parents and that it was inappropriate content for children in Kindergarten and Grade 1.

³ While this is an important case and is more nuanced than what I have included, I am referencing it to illustrate how the court ruled that cognitive dissonance is necessary to teach children about different experiences.

The school board contended that the books would result in cognitive dissonance because the families in the books are different from their own (Mackay, 2009: 53). The Supreme Court judge overseeing the case ruled that banning the books was discriminatory and that some cognitive dissonance is needed to teach students about things that are different from their experiences/beliefs and to teach them about tolerance. In this way, religious families are not discriminated against or harmed by this cognitive dissonance because they are not forced to change their beliefs and are able to continue practicing these beliefs (Cameron and Daly, 2013; Mackay, 2009). The first area in which religious concerns are regularly emphasised is anti-bullying policies/safe school policies that include sexually diverse communities.

One of the first provinces to develop a focus on sexual orientation in education was Ontario. In the mid-2000s, the provincial government appointed a Safe Schools Action Team, which focused on gender-based violence, homophobia and sexual harassment. In its 2008 report, sexual orientation was listed as a key factor for hate crimes, especially in school environments. As a result, the 2009 Keeping Our Kids Safe at School Act was introduced, which required school staff to report serious cases of violence, including homophobic/transphobic violence. This was followed by further initiatives requiring school boards to develop policies on equity as well as policies that are inclusive of gender identity and sexual orientation. In 2012, the Accepting School Act was passed and took a more punitive approach to bullying and hate crimes-including based on sexual orientation-and required school boards to support students who asked to create GSAs. In British Columbia, the Ministry of Education required school boards to create policies that respected provincial human rights code, which includes protecting against discrimination based on sexual orientation. In Quebec, schools were told to create plans to address bullying, including homophobic bullying. A few other provincial initiatives include Bill 18 in Manitoba, which addressed bullying and stipulated that school boards need to support student requests to create a GSA (Rayside, 2014: 197-204) and in 2011, Newfoundland/Labrador trained administrators on how to support GSAs (Newfoundland and Labrador Department of Education, 2014: 29). In 2014, Alberta passed legislation that allowed students to create GSAs and in 2017, this legislation was strengthened with Bill 24, which required school boards to immediately respond to students requests for a GSA (Lewsen, 2020).

While the above provincial governments have made efforts towards including sexually diverse communities in schools, simply having an anti-bullying policy or safe school policy is not enough to protect and keep these students safe. In particular, these types of policies are often reactive - responding to some type of violence that happens - and are punitive instead of addressing underlying systemic issues. These types of policies often focus on physical safety instead of the effect of difference and the role of power, especially in the context of sexual diversity. Therefore, these policies do not always challenge the status quo and do not address homophobic/transphobic violence (Payne and Smith, 2012; Rayside, 2014; Walton 2004; Walton 2011). Instead, safe school policies give the impression that schools are actively working towards creating a safer school environment and to reassure parents that something is being done, especially when media draws attention to deaths related to school violence (Walton, 2011: 134). The other way in which safe schools and inclusion are promoted is through gay-straight alliances (GSAs), which are perceived as combatting discrimination against sexually diverse students (Clark and MacDougall, 2012: 149)

GSAs are said to promote acceptance of all sexualities in a school environment (Clarke and MacDougall, 2014: 145) and construct safe spaces for sexually diverse students in their

school environments (Taylor and Peter, 2011: 302). Additionally, GSAs have an education function and, according to Stonefish and Lafreniere (2015), GSAs can serve as an alternative way of confronting heterosexual norms, especially when sex education curriculum does not include LGBTQ+ related information (14). Since GSAs imply an acceptance of sexual diversity, there is a lot of resistance to them by religious parents and/or schools. Conversely, the refusal to allow GSAs sends a message that sexually diverse communities are not welcomed (Clarke and MacDougall, 2012: 209-211). Despite religious-based concerns, some publicly funded faith-based schools have been required to adhere to provincial educational policy that goes against their religious beliefs. For example, Bill 13, The Accepting Schools Act in Ontario and Bill 10, An Act to Amend the Alberta Bill of Rights to Protect our Children and Bill 24, An Act to Support Gay-Straight Alliances in Alberta. These pieces of legislation require publicly funded Catholic schools to allow the creation of gay-straight alliances (GSAs) regardless of the school or parents' beliefs (Bosetti and Gereluk, 2016: 59) in efforts to create safe and inclusive school environments. Another area in which there is a lot of resistance to inclusion of sexually diverse communities is curriculum policy.

Regarding curriculum changes, there has not been much effort by ministers of education to include sexual diversity in curriculum outside of sex education, and any efforts that have been made have met with a lot of resistance (Rayside, 2014: 214). The argument for ensuring that sexually diverse communities are in the curriculum is that it is important for various social groups to see themselves represented in the curriculum so that they feel included (Taylor and Peter, 2011) and to counter existing misinformation and stereotypes about sexually diverse issues (Clarke and MacDougall, 2014: 153). There have been programs put in place by school boards/districts, such as the numerous LGBTQ+ related policies by the Toronto District School Board, or the SOGI 123 program in British Columbia. SOGI 123 is a network of educators from all sixty school districts in BC that aims to support LGBTQ+ students and provide resources for teachers, parents and students. While these programs are important, support from the provincial scale is also significant. For example, when governments make the effort to change curriculum or introduce policies, there is a greater chance that these will be implemented at the school board and school levels; however, when governments are slower to respond, educators have an excuse not to teach curriculum inclusive of sexual diversity (Rayside, 2014: 214). Similar to the measures discussed above, resistance for religious reasons is common, especially in separate school boards as different sides fight for their rights to be respected.

Conclusion

Provincial educational policy-making is a process in which various relations are involved. As this chapter illustrated, educational policy-making is not situated at one particular scale, but relies on the way that various scales work together. The ministries of education and school boards have separate functions even though the role of the school boards is determined by the provincial government, especially the Minister of Education. Even though education policy is centralized and the provinces/territories have jurisdiction over education, what happens in other provinces' education systems is also important as the Ministers of Education coordinate their efforts through the CMEC to ensure that education remains under provincial control and to create a coherent education system across the country. Furthermore, the Charter requires ministries of education to provide equal access to all students despite conflicting rights between faith-based parents and sexually diverse students. For this reason, religion is a notable factor that shapes provincial education policy, especially when faith-based schools receive provincial funding and must abide

by provincial regulations. How provincial governments include sexual diversity in education is very much shaped by its relationship with faith-based interests. Finally, as this chapter illustrated, ideas about how students should be educated are not limited to Canada, but also integrates ideas from the international scale. For example, Canada's commitment to the UN's Learn 2030 Agenda for Sustainable Development and the CMEC's role of ensuring inclusive education in all provinces/territories.

Chapter 2: Institutional Change as Relational

Lowndes and Roberts (2013) state that gradual institutional change occurs because of both endogenous and exogenous factors and that analysing institutional change requires studying the interactions of institutions, actors, and environments (130). In this chapter, I will discuss how provincial education policy-making is a locality where these factors, in the context of sexual diversity, interact over time resulting in gradual policy change through a feedback process. In other words, I will demonstrate how institutional change is relational. Therefore, the intent of this chapter is to illustrate how provincial educational policy-making has changed through a process of gradual institutional change and policy feedback. The first section will introduce theories of policy change, followed by a section on historical institutionalism, and in particular, theories of gradual institutional change and policy feedback theory. This section will be followed by a discussion of place/locality as relational from a geography perspective.

Theories of Policy Change

Some common theories of policy change include the advocacy coalition framework, policy network theory and punctuated equilibrium theory. First, the advocacy coalition framework uses policy subsystems as the unit of analysis and requires a time period of at least ten years to understand policy change. Actors within the advocacy coalition come from various public and private organizations and try to turn their beliefs into policies by influencing government decisions (Jenkins-Smith and Sabatier, 1994; Pierce et al., 2017; Sabatier, 1988; Weible and Jenkins-Smith, 2016; Weible and Sabatier, 2007). In advocacy coalitions there are four pathways for policy change. These include events external to the subsystem, such as elections, and events internal to the subsystem, such as policy learning and agreements among coalitions (Weible and Jenkins-Smith, 2016: 24). While my research meets many of the criteria found within advocacy coalition frameworks, I am using an institutional perspective because the advocacy coalition framework does not question how advocacy coalitions function in relation to institutions and instead focuses on the actors within a policy subsystem.

The next theory of policy change is policy networks, which consist of interdependent actors, both government and non-government, who share beliefs and interests in a specific policy area. Policy emerges from the interactions among these actors (Rhodes, 2006: 426). Similar to the advocacy coalition framework, policy networks focus on actors whereas a historical institutional approach not only considers the role of policy actors in policy change, but also the way that these actors are constrained and must work within institutional rules. This does not mean that policy networks are not useful to consider as part of a mechanism that generates policy change, especially considering that policy networks are relational (Raab and Kenis, 2007: 187). However, in my dissertation, I illustrate how institutional change is relational not through policy network theory, but with a geography lens to show how policy-making is not only the result of interaction among actors, but also other institutions and the environment.

Finally, punctuated equilibrium theory (PET) explains both stability and rapid change in political outcomes (Baumgartner and Jones 2009, 3). Jones and Baumgartner (2012) emphasize the importance of information and bounded rationality in PET because the information processed by decision makers is limited as a result of their limited attention span and emotions (Jones and Baumgartner, 2012: 3-7). While policy issues are located within a subsystem, they have a period

of equilibrium; however, when a policy community breaks down, the issue moves to the political agenda (Baumgartner et al. 2018, 59). Once an issue is moved to the political agenda, there is a possibility of policy change. Jones and Baumgartner (2012) state that change only occurs when there is a major event, or when minor events build up over a period of time (8). The result is policy punctuation that leads to significant policy change. These changes result in a positive feedback process (Baumgartner et al. 2018, 60) in which “change begets change” (Jones and Baumgartner 2012, 3). In other words, change in policy may result in rapid changes in other areas; for example, change may result in the development of new institutions and subsystems. After the period of punctuation, according to Jones and Baumgartner (2012), a period of equilibrium resumes. While PET focuses on mechanisms of policy change (Jones and Baumgartner, 2012) and considers both institutions and actors, the theory also considers how either a major event or minor events over time lead to change. However, this approach is similar to the change and stability model in historical institutionalism, which focuses on path dependency and critical junctures (see below). My interest is in how small policy changes over time can lead to more transformative changes, which can be addressed by theories of gradual institutional change.

Historical Institutionalism

The early 1980s was the beginning of the ‘institutional turn’, which focused on how institutions created political actors, while also constraining their behaviour (see March and Olson, 1989). Institutions have been defined in various ways, such as the rules that shape human interactions (North, 1990), rules that define relational appropriateness (March and Olson, 1989), as well as regularized practices (Hall and Thelen, 2008). For the purpose of this dissertation, I will use Hall and Taylor’s (1996) definition of institutions, as the ‘formal and informal procedures, routines, norms and conventions embedded in the organizational structure of the polity or political economy’ (938). Particularly, I conceptualize an education system as an institution in which routines, norms and conventions are embedded. Therefore, gradual changes in LGBTQ+ education policy has the potential to transform the education system, and vice versa.

Historical institutionalism is only one of the approaches that have developed out of this institutional turn. Other approaches include sociological institutionalism, rational choice institutionalism, and, more recently, discursive institutionalism and feminist institutionalism. Sociological institutionalism stems from organization theory (Hall and Taylor, 1996: 946) and primarily focuses on how institutional norms shape behaviour, especially how these norms are adopted and perpetuated by individuals within institutions (Peters, 1999: 107). In contrast, rational choice institutionalism explores how institutions constrain actors’ behaviour, but also how actors use institutions to maximize their interests (Hall and Taylor, 1996; Peters, 1999). Discursive institutionalism focuses on the interactive process between discourse and ideas (Schmidt, 2008). Finally, feminist institutionalism focuses on power dynamics in institutions, particularly how institutional power imbalances are gendered (Kenny, 2013; Kenny and Mackay, 2009), as well as the ways that institutions can be re-gendered (Chappell, 2002; Krook and Mackay, 2011) through political opportunities (Chappell, 2002). Various actors may take advantage of this opening, including those who seek to change the institutional power relationships. Thus, institutions are dynamic and have the potential to change what is considered appropriate in an institution (Chappell, 2002). While each approach has value on its own, there has been considerable overlap of these approaches in subsequent research, especially as researchers integrate approaches (see Hall, 2010).

As mentioned in the introduction, historical institutionalists are interested in how temporal processes can change institutions, as well as how institutions both constrain institutional actors and provide opportunities for institutional change. (Fioretos et al., 2016; Lowndes and Roberts, 2013; Steinmo, 2008). For this reason, they are interested in the interrelations among actors both within and outside institutions, their goals and power dynamics (Sanders, 2006; Thelen and Steinmo, 1992: 13). Historical institutionalists are also interested in the relationship between actors' ideas and institutions (Béland, 2005; Hall and Taylor, 1996). A focus on ideas highlights the role of political actors within institutions (Steinmo, 2008), especially how they can strategically gain support for their policy ideas (Béland, 2009: 703). Moreover, focusing on ideas in historical institutionalism allows for a greater understanding of how ideas become powerful, whose ideas are prioritized, the policy consequences of ideas (Lieberman, 2002: 700), as well as how pressure from advocacy groups or a newly elected government can influence which policy ideas are debated (Béland, 2005: 13). Ideas illustrate how institutions are shaped by conflict and how conflict results in gradual change (Thelen and Conran, 2016). One of the ways in which institutional change is discussed is through the concepts of path dependency and critical junctures, which focuses on both institutional stability and change.

Path dependent analyses explore how institutional legacies constrain the policy choices that actors can make, thereby limiting outcomes for policy change as well as questioning how causal processes are a part of a temporal sequence that begins with a contingent event. This sequence is said to be deterministic and once it is in motion, it is difficult to change (Mahoney, 2000: 510-511). For example, discussions about sequencing in path dependent approaches focuses on how various actors compete to occupy political space. Sequencing is important in this competition because whomever arrives early will have a greater advantage since they will have greater access to resources, which will enable their success (Pierson, 2000; 2004). There are two types of sequencing: self-reinforcing and reactive sequences. Self-reinforcing sequences occur when institutions are reproduced over a long period of time in a way that does not allow for alternatives solutions, and focuses on a deterministic path. Reactive or causal sequences is when there is a chain of events and each event is 'reacting' to a proceeding one (Mahoney, 2000).

Critical junctures occur in various ways and in different contexts. However, in general, they consist of an event that occurs over a short period of time, but has long-lasting outcomes (Mahoney et al., 2016:78). During a critical juncture, the possibility to choose an alternative path opens up as political actors have more choices. The choice made during this period has a long lasting influence on an institution because alternative choices are cut-off and the institutional process will then continue to be self-reinforced (Capoccia and Kelemen, 2007: 341). Contingency is important in this process because as the institutional constraints that maintain path dependency are relaxed, there is greater opportunity for contingency to shape the decisions made by actors (Capoccia and Kelemen, 2007; Soifer, 2012).

While some earlier historical institutionalists focus on institutional change in the context of critical junctures and path dependency, particularly the 'locked-in' determinacy of path dependency, this generation of historical institutionalists have had difficulty explaining how change occurs. More recent research on historical institutionalism focuses on how institutions continue to be an object of political contestation, even during times of path dependency, and the ways that gradual changes over time become significant and potentially transformative (Hacker, 2005; Lowndes and Roberts, 2013; Mahoney and Thelen, 2010; Thelen, 2004; Thelen and Conran, 2016). In this way, institutions are not self-reinforcing, but reflect the conflicts of actors

with different goals (Mahoney and Thelen, 2010; Schickler, 2001). One way that conflict occurs is with changes in government, which opens opportunities for policy change. (Bick, 2016: 345). For example, when the Alberta NDP government was in power, they introduced comprehensive legislation for GSAs; however, when the United Conservative Party took over in 2019, they reverted to the 2015 GSA legislation, which did not provide as much protection for students who wanted to create a GSA. Alternatively, the new party may retain old policies, but not enforce them in the same way, which is what happened in Newfoundland/Labrador when their safe school policy regarding gender and sexual diversity remained in place, but did not receive the same support as under the previous minister of education. These policy changes, which are not linear, can occur through various mechanisms.

My interest in historical institutionalism concerns how institutions change gradually through a feedback process. Therefore, I will integrate historical institutionalist's theories of gradual policy change and policy feedback theory, which will provide a more dynamic understanding of how Alberta and Newfoundland/Labrador changed their education system in the context of sexual diversity. As discussed in the introduction, I am interested in theories of gradual policy change to illustrate that policy change happened over time in each of the case studies. To understand how this process happened, I will identify the feedback mechanisms that generated policy change. Therefore, I will show how institutions are an object of political contestation, even during times of path dependency, and the ways that gradual changes over time become significant and potentially transformative (Hacker, 2005; Lowndes and Roberts, 2013; Mahoney and Thelen, 2010; Thelen, 2004; Thelen and Conran, 2016). In this way, I am interested in the political conflicts that occurred over time, including those with outside actors, such as advocacy groups, the decisions that were made (or not made) and how these contributed to overall change. Next, I will discuss gradual institutional change from a historical institutionalist perspective followed by policy feedback.

Gradual Institutional Change

The literature on gradual institutional change primarily focuses on endogenous policy change (see Hacker, 2004; Mahoney and Thelen, 2010; Streeck and Thelen, 2005; Thelen, 2004; Thelen and Steinmo, 1992). In particular, Streeck and Thelen (2005) have identified modes of gradual change, including layering, displacement, drift and conversion. Layering may occur when existing policy is altered through revisions and amendments, especially when formal policy change is not possible (Hacker, 2004; Mahoney and Thelen, 2010; Streeck and Thelen, 2005). For example, when there are actors who want to preserve the status quo by maintaining the original rules of an institution, there is resistance to formal policy change. However, when there are also contesting actors who want to change the institution, layering allows them to work within the system to amend the rules (Bick, 2016; Mahoney and Thelen, 2010: 17; Schickler, 2001: 16). New rules can then result in new policy instruments and actors or they can change an institution's ideas, values and goals (Capano, 2019: 595). At the same time, institutions are also responding to changes in the political and economic environments (Kay, 2007; Streeck and Thelen, 2005).

Displacement is another mode of institutional change, which entails replacing existing rules with new ones (Mahoney and Thelen, 2010: 17). Displacement occurs when there is a shift in balance of power or changing circumstances. As a result of these changes, either new laws are passed or existing ones are amended (Hacker, 2004). Change can be rapid, such as with revolutions or slow-moving, as when new institutions compete with older ones. Therefore, actors

who are responsible for institutional change through displacement are often those whose political interests were not prioritized under the older institutional rules (Mahoney and Thelen, 2010: 17). Displacement decisions and the response from target groups are the decisions that are often seen in media headlines (Bick, 2016: 357)

A third mode of institutional change is drift, which occurs when policies remain in place despite change in the context surrounding these policies, such as change in the economy or social trends (Béland, Rocco and Wadden, 2016: 203; Bick, 2016; Hacker, 2004; Hacker, 2005; Hacker, Pierson and Thelen, 2015; Mahoney and Thelen, 2010). However, drift entails more than simple inaction by policy actors, it requires that the change in policy context has an effect. Additionally, there are alternative policy choices that can help mediate the effects of changed policy outcomes; however, no efforts are made to change the policy (Hacker, Pierson and Thelen, 2015; Rocco and Thurston, 2014). Consequently, those who want to work around existing policy need to find new political venues, which may entail different levels of government or the courts (Galvin and Hacker, 2020). For example, new laws, judicial decisions and/or interest group pressure may result in changing the direction of previous policies (Ricucci, 2018: 25). When policy drift occurs, new problems and politics emerge, as well as the formation of new groups. On the one hand, there are the old groups that want to maintain existing policy, as well as interest groups that participated in the development of the original policy. On the other hand, there are new groups who emerge in response to new problems and opportunities that develop as well as new politics (Galvin and Hacker, 2020: 218-219). Therefore, the challenge that arises for policy-makers is ‘how to respond to the gap between the original aim of a policy and new realities of changing social conditions’ (Hacker, 2004: 246). Béland, Rocco and Wadden (2016) give the example of UK welfare state program in the 1940s, which were designed with the assumption that women would remain home and care for the children; however, as women also became employed, the policy no longer met their needs. Policy drift happened when policy-makers failed to change the policy to adapt to this new reality (204).

The fourth mode of institutional change is conversion, which is when institutional rules remain the same, but are interpreted in a new way (Hacker, 2005; Hacker, Pierson and Thelen, 2015). This gap occurs because actors change an institution’s goals, functions or purposes (Mahoney and Thelen, 2010: 17-18). Conversion may happen when there are changes in political power (Mahoney and Thelen, 2010), which also results in new goals and new actors. Over time, as institutional goals and actors shift, new gaps emerge that provide opportunities for conversion (Streeck and Thelen, 2005).

Policy Feedback Theory

Policy feedback is when the effects of previous policy influences future policy and political development⁴ (Béland et al., 2022; Daugbjerg and Kay, 2020; Pierson, 1993, 1994; Schmidt et al., 2020; Weaver, 2010). What this means is that policy feedback is an endogenous process in which the policy itself is what triggers a feedback effect (Daugbjerg and Kay, 2020). Feedback effects can happen in three ways, namely political effects, fiscal effects and social effects. Political effects are when a policy or program generates its own base of support, while fiscal

⁴ Policy feedback effects have also been referred to as policy feed forward effect. Schneider and Sidney (2009) suggested the use of feed forward effects because policy outcomes influence future politics. Therefore, policies feed forward and influence future policy and politics (108).

effects are when government funding is needed. Social effects are the societal costs and benefits of policies (Weaver, 2010: 142). Policy feedback can change how societal groups are perceived, especially when target groups are socially constructed as deserving or underserving (see Ingram et al., 2007). Feedback can also change the public's attitude towards governments (Bèland et al., 2022: 26). Feedback effects can occur through the mass public, as well as elites, including advocacy group elites (Stokes 2020: 39), and political and bureaucratic elites.

Since policy feedback can happen through a variety of policy actors and in different ways, the context in which policy feedback occurs becomes important. On the one hand, policies interact with institutional context, which influences how policies are designed, whether they will be revised and the supports available to maintain the status quo (Jacobs and Weaver, 2015; Skogstad, 2017). On the other hand, feedback processes can be an interaction of policy effects and environmental factors (Bèland, 2020: 41). For example, societal views about sexually diverse communities are neither exogenous nor endogenous, but a combination of both. They are influenced by policy design, such as constructing sexually diverse youth as needing protection from bullying. However, there are also environmental factors that influence these constructions, such as educating about the impacts of discrimination and violence on these youth.

Policy feedback effects can be self-reinforcing, self-undermining or a combination of both (Bèland et al., 2022: 36). The older historical institutionalist literature on policy feedback, particularly in regard to path dependency, focuses on self-reinforcing effects, also known as positive feedback in which a policy's status quo is maintained. (Pierson, 2000). For example, a policy might provide resources to organizations that advocate for sexually diverse communities as a way to continue generating support for that policy. What this means is that the more support there is for the policy, the greater chance the policy will continue unchanged. However, policies will not always be self-reinforcing because there are a variety of policy actors with different power relations and interests debating policy (Schickler, 2001; Stokes, 2020). Therefore, when gradual policy change happens as a result of conflict, the feedback effects may be self-undermining (Jacobs and Weaver, 2015; Weaver, 2010).

According to Jacobs and Weaver (2015), policies' self-undermining effects may occur when there are unanticipated losses for actors who initially supported the policy. Additionally, self-undermining effects may occur when the mass public can be convinced that major policy change is needed (Bèland et al., 2022; Jacobs and Weaver, 2015). One way that this might happen is when political elites frame a policy as needing change so that the public will benefit from these changes (Jacobs and Weaver, 2015; Skogstad, 2017). Expanding the available menu options is another self-undermining effect (Jacobs and Weaver, 2015). The literature on self-reinforcing feedback processes (see Pierson, 1993, 1994, 2000) emphasizes how menu options become more constrained the longer that a policy is path dependent; however, menus can also expand. This expansion occurs if new ideas and/or instruments are introduced (Jacobs and Weaver, 2015). Additionally, new advocacy groups may begin organizing if they have been excluded and/or harmed from existing policy, resulting in the expansion of policy alternatives (Bèland et al., 2022; Jacobs and Weaver, 2015; Stokes 2020; Weaver, 2010). There are numerous ways that policy feedback effect occurs and over time, these effects can result in gradual policy change. In the next section I will discuss layering and drift and their policy feedback effects. I have chosen to focus on these types of policy change because they are the ones most commonly found in the policy feedback literature (Wellstead et al., 2018: 120).

Layering

Kathleen Thelen (2004) argued that positive feedback (self-reinforcing) is better at describing institutional stability than change. In particular, she states that at critical junctures, old institutions are not necessarily replaced, but adapted to new actors and context (34-35). One of the ways in which this change is accomplished is through policy layering (Bèland et al., 2022; Thelen, 2004). Layering can be self-reinforcing, especially when there are negotiations between policy actors seeking to maintain the status quo and those advocating for change. Layering allows the latter to change the policy while working within the institutional rules (Mahoney and Thelen, 2010; Schickler, 2001; Streeck and Thelen, 2005). However, layering can also be self-undermining.

Layering is self-undermining when past policies conflict with new policies (Patashnik and Zelizer, 2013; Smedby, 2019; Wellstead et al., 2016). This tension between different layers of policy is referred to as tense layering (Wellstead et al., 2016: 1875). However, the layering of policies may not always be in tension, they can also be complementary, especially if it fills a gap from a previous layer or addresses a secondary concern (Daugberg and Swinbank, 2016; Smedby, 2019). For example, adding sexually diverse communities to bullying prevention policy can fill a gap and complement previous policies. The secondary concern is that this community faces homophobic bullying, which also must be addressed. However, this type of layering may also result in self-reinforcing effects by those who want to maintain the status quo (Daugberg and Swinbank, 2016: 269). Consequently, compromises may be needed for those who previously benefited from the policy (Bèland et al., 2022: 74).

Drift

Galvin and Hacker (2020) state that research on drift was inspired by policy feedback theory (217). Policy feedback in drift may include stakeholders changing their support for the drifting policy (Ricucci, 2018: 261), new policy problems, the emergence of new groups in response to these new problems, as well as adaptation by old groups who supported the drifting policy (Galvin and Hacker, 2020; Kay and Baines, 2019; Ricucci, 2018). Consequently, the political dynamics and status quo also change (Galvin and Hacker, 2020: 222). As both old and new groups respond to drift, alternative venues, such as the courts or human rights commissions may be pursued by those dissatisfied with current policy (Galvin and Hacker, 2020; Ricucci, 2018).

According to Miriam Smith (2015), the courts have been a key venue for obtaining LGBTQ+ rights (189). The Supreme Court of Canada determines if federal and/or provincial laws violate Charter rights. If rights restrictions are found, the Supreme Court then decides if the restriction is constitutional (Vilvarde, 2013: 601). In this way, the court can change policy by nullifying legislation that does not pass the Charter review process or they can read in Charter rights to existing legislation (MacFarlane, 2018: 396). Therefore, one way to undermine drifting policy is by challenging its constitutional validity through the court system.

An example of policy feedback as a result of drift is the 1992 *Haig v Canada* decision and its effect on provincial human rights. In the *Haig* decision, the Ontario Court of Appeal declared that the exclusion of sexual orientation from the Canadian Human Rights Act (CHRA) was unconstitutional. The federal government decided not to challenge this decision and four years later, the CHRA was changed to include sexual orientation (Nierobisz et al. 2008, 248). Therefore, policy drift occurred because the CHRA had not included sexual orientation as a prohibited ground of discrimination; however, by the time of the *Haig* decision, most provincial

governments had already included sexual orientation in their human rights legislation. What this means is that the social and legislative context surrounding human rights and sexual orientation had changed in many provinces despite the exclusion of sexual orientation from the CHRA. The feedback effect of the *Haig* decision is that the human rights commissions in Newfoundland/Labrador was able to read in sexual orientation to its human rights legislation even though provincial legislation had not changed (Warner, 2002).

Next, I will discuss how institutional change is a relational process by illustrating how external context interacts with endogenous policy change. For example, Lowndes and Roberts (2013) contend that institutions both shape and are shaped by the actions of other actors (136), while Capano (2013) states that policy change can be explained by internal and external relations (454). Therefore, exploring gradual institutional change through a policy feedback process requires looking at how the external environment and institutions influence policy decisions as well as how changes in policy shape the environment. In other words, how institutional change is relational. In order to have a greater understanding of this process, it is important to consider how place is constructed over time through social and political processes as various institutions and actors from different scales interact.

Place as Relational

In this section, I will provide an overview of relationality, and in particular, how the concept of scale is relational and how this applies to the construction of place as relational. This will be followed by a discussion on place and then a more nuanced discussion on locality/place as relational as conceptualized by Doreen Massey. I will then discuss multi-scalar equality rights and how this contributes to a policy feedback process.

Relationality

Relationality in policy can be understood as the interactions between policy actors and the ways that these relations impact policy-making (Bradbury and Bergmann Lichtenstein, 2000; Lejano, 2020) or as interdependence among policy actors and institutions (McClung and Young, 2011: 39). Feminist political scientists have also discussed relationality. For example, Chappell (2002) contends that feminists are not only shaped by institutions, but institutions are also shaped by feminists. These interactions influence which political opportunity structures are available to feminists (179). Additionally, Hawkesworth (2005) illustrates how political processes shape identities and institutions through power relations (145), while Mackay (2004) discusses how differences/similarities in behaviours are produced through gendered interactions and that these may change depending on context (110).

Regarding historical institutionalism, scholars have prioritized historical context in understanding institutional change and given less attention to spatial relations. For example, Hall (2016) contends that the factors that shape policy may not be the same in different time periods. He also states that time periods should be divided according to how open they are to institutional or ideational change because causal factors for change may differ in each type of period (38). Furthermore, Steinmo (2008) states that history is important because political events in one historical period influence later decisions (128). Additionally, Pierson (2004) contends that spatial contexts could be pursued, but he would instead explore temporal context (172). More often, space is conceived as bounded territory (see discussion by Bates and Smith, 2008) or units of comparison (Hall, 2016). In this way, space is treated as a container, or as ‘dead, fixed, and

immobile space' (Smith, 1992: 64) in which political and social processes occur. However, this conception of space fails to appreciate that physical space is socially produced and changed over time *through* these political and social processes and the interrelations and unequal power dynamics that they entail (Brenner, 2004; Ethington and McDaniel, 2007; Massey, 2005). In other words, space is relational.

Therefore, what historical institutionalism needs is greater attention to spatial relations and the way that both place and history are important (Bates and Smith, 2008: 192). For instance, path dependency has spatial implications because institutional paths are found in geographical spaces and how these locations are historically constructed may have different policy consequences (Ethington and McDaniel, 2007: 139). Furthermore, institutions develop in relation to its territory's dominant norms (Bathelt and Glucker, 2013: 8), which means that when these institutions develop gradually, the rules and dominant norms of the place in which they develop will become embedded in the institutions. Integrating a geography lens of place/space in historical institutionalism will allow for a relational understanding of institutional change. What is important for this dissertation is that policies are not only territorial constructions, but are also shaped by the interaction of networks of social relations from different scales. Therefore, another factor that is significant for place as relational is the concept of scale (Bathelt and Gluckler, 2013; Girard and Lucas, 2017; Massey, 2005; Sunley, 2008; Yeung, 2005).

Scale

Scale can be viewed as either an object of analysis or as a form of practice, including how scales are constructed and contested (Jones, 1998; Moore, 2008). One of the criticisms of the former approach is that scale is viewed as a fixed hierarchical framework instead of scale as something that is socially constructed, relational, politically contested and shapes political life through social, political and economic processes (Allen and Cochrane, 2007; Fraser, 2010; Jones, 1998; Marston, 2000; Marston, Jones and Woodward, 2005; Moore, 2008; Smith 1992). For example, Jones (1998) contends that scale is a representational, contested and historically specific practice that is subject to change. Scalar practices may enable certain power relationships and spaces, resulting in some social groups' benefitting from material resources, while others are disadvantaged (26-28). Moore (2008) builds on this theory of scale as an epistemological category and discusses how scalar practices entail social actors using scalar categories and concepts to understand their social world, as well as the material effects that result when political leaders and institutions use these scalar categorizations (214) Fraser (2010) further expands the idea of scalar practices with the concept of scalecraft, which examines the skill, aptitude and experience within scalar practices (such as rescaling), when these practices fail and why (333). In order to conceptualize scale as relational, Mansfield (2005) proposes scale as an analytical category to illustrate how scales interact. For example, he states that the national scale should be conceptualized as something that has developed over time as it interacted with other scales (471).

In the social sciences, including in political science, scale has been used as a way to understand policy. For example, Mahon (2005), looks at interscalar arrangements in the context of childcare policy and services and in particular, the ways that the municipal scale was excluded from these arrangements as well as actions taken to counter this exclusion. One of these actions was the concept of 'jumping scale', which means that policy actors will bring their issues to the scale that align with their interests and where they are more likely to succeed (Jessop, 2009: 98). Scale jumping is an example of how scale is used politically (Papanastasiou, 2016: 41). Grundy

and Smith (2005), using the concept of multi-scalar citizenship, highlight how LGBTQ+ organizing occurs at both local and national scales and that these scales often operate separately. Consequently, LGBTQ+ organizing is shaped by the power relations at each scale.

While scale can be a useful concept for understanding policy, focusing on scale risks scale-centrism, resulting in the exclusion of other spatial explanations (Jessop, 2009: 89). As a result, studying space may be limited to one dimension (Keil and Mahon, 2009) when according to Jessop, Brenner and Jones (2008), there are four dimensions of space-territory, place, scale and network. The authors contend that spatial analysis should include at least two or more of these dimensions (391-392). For my project, I am primarily focusing on the dimension of place, which is discussed below, while using scale to provide a deeper understanding of how the networks of social relations from different scales shape provincial educational policy-making.

By theorizing provincial educational policy-making as a locality, I demonstrate how different social and political processes from different scales are institutionalized through provincial educational policy-making. In this way, the unit of analysis is not scale, but the respective policy. In particular, I am interested in how the interactions of different networks of social relations are institutionalized in these policies. For example, if the policy is a safe school policy, and the issue is how to include measures for sexually diverse communities in this policy, such as GSAs, I am not exploring how this policy is implemented or interpreted at different scales. Instead, I am interested in how the debates, policy actors and institutions involved in the issue of GSAs in schools (networks of social relations) at different scales *interact* in provincial educational policy-making. How are the negotiations over GSAs from these different social relations institutionalized? In other words, I am interested in how the “throwntogetherness of place”-the way that place is constituted over time by the interconnections of different paths and social relations from various scales and how these interconnections are negotiated (Massey, 2005: 130).

Place

In the human geography literature, place is discussed in various ways, including locality, regions, cities and territories and has numerous definitions and understandings. Some authors, such as Malpas (2018) makes a definitional distinction of the concept place. He states that place can be a specific point or a place where someone lives (25-26). Other perceptions of place view it as relational and located within different contexts (Agnew, 2011; Massey, 2005). In particular, Massey (2011) contends that from a relational perspective, there is no conflict between place as relational and place as territorial because the identity of places are constructed relationally (4). Other authors, such as Martin (2003) uses the concept of place-framing to identify the relationship between activists' frames and place-based identities and how these frames not only rely on, but also construct place-based identities (747). Place frames can be used to analyse the intersections of politics, place and networks at various scales (Pierce, Martin and Murphy, 2011: 59) or relational place-making involving multiple scales (Davine, Lawhon and Pierce, 2017: 430). Doreen Massey's conceptualization of space/spatiality as relational has become the dominant view of space not only in geography, but also in other disciplines (Malpas, 2012: 228).

Massey's conception of place draws from localities studies, which began in the 1980s as the United Kingdom underwent various economic and social changes, including the decline of major manufacturing cities, greater rates of unemployment, and more significantly, spatial restructuring. For example, in some areas, there were population and employment shifts from big

cities to rural areas. As a result of this geographical restructuring, there were uneven social and economic changes in different localities, such as the gendered division of labor and increased women's employment, class structure, as well as the uneven distribution of cultural traditions and resources. Additionally, there were political implications since national/international policies and politics had differential effects in each locality. For these reasons, the locality projects began in the UK to understand how national and international changes affected different parts of the country (Massey, 1994: 127-128).

Massey's focus on locality studies was also a partial response to authors, such as David Harvey, who privileged space over place and viewed the study of localities as anti-progressive. Locality studies was viewed by some as parochial and descriptive, as denying the larger socio-economic processes from different scales (Massey, 1993; 1994). However, Massey contended that localities could be studied differently by emphasizing the networks of social relations from different scales that converge in a particular location, which she refers to as a "global sense of place" (Massey, 1993; 1994). This configuration is what makes each place/locality unique. According to Massey, the specificity of place is:

Constructed out of a particular constellation of social relations, meeting and weaving together at a particular locus. If one moves in from the satellite towards the globe, holding all those networks of social relations and movements and communications in one's head, then each 'place' can be seen as a particular, unique, point of their intersection. It is, indeed, a meeting place. Instead then, of thinking of places as areas with boundaries around, they can be imagined as articulated moments in networks of social relations and understandings, but where a large proportion of those relations, experiences and understandings are constructed on a far larger scale than what we happen to define for that moment as the place itself, whether that be a street, or a region or even a continent (Massey, 1994: 154).

Therefore, localities are not bounded territories, but instead, constituted by multiple networks of social relations not only at the local scale, but also from other geographical scales converging within a particular location. (Jones and Woods, 2013; Massey, 1994). For this reason, understanding any locality/place requires situating it within a larger context in order to understand that on the one hand, local practices and processes can be affected by the global scale, and on the other hand, the actions of local people influence events in other places (Jones, Jones and Woods, 2004; Massey, 1993: 144). In this way, localities/places are a product of negotiation and conflict between different relations from the local scale to the global as they come to rest in local configurations (Massey, 2009: 23), especially since the power dynamics of relations differ (Massey, 1993: 145). Moreover, the types of interrelations within a locality/place may differ, especially when there are distinct networks of social relations that live in and change how space is constructed, and as a result, different types of relations. Consequently, how localities/places are produced are not the same (Brown, Browne and Lim, 2007; Jones, Jones and Woods, 2004; Saldanha, 2013). In other words, what makes a locality/place unique is that no other locality/place has the same sets of social relations that come to rest there. (Massey, 1993: 148).

In my study, I use this view of locality/place as relational to conceptualize provincial educational policy as a locality. On the one hand, Jones and Woods (2013) state that a policy field can be a locality (31). On the other hand, Massey (1993) states that a locality can be used to explore issues in depth (148). In my study, I will conceptualize provincial educational policy-

making as a locality where various networks of social relations from different scales come together to negotiate and institutionalize equality rights of sexually diverse students in education. In this way, I will use the concept of locality to explore how Alberta and Newfoundland/Labrador's education system changed in the context of sexual diversity. Moreover, Massey states that localities are continuously contested and in the process of being made as new connections come and go (Massey, 1993: 149). Therefore, integrating historical institutionalism, especially policy feedback and gradual change, will enable me to apply the idea that localities continuously change to show how policy feedback processes introduce new connections and social relations into the policy-making process, resulting in gradual change. In this way, using the concept of locality will highlight the complexity of educational policy change, situate the issue of sexual diversity and education policy within a larger social, cultural, political and economic context, and illustrate the various relations, power dynamics and scales that shape education policy. In other words, how educational policy change is a relational process. In the next section, I will discuss the multi-scalar effects of equality rights for sexually diverse students to show how the spatial implications of equality rights has feedback effects on provincial education policy.

Policy Feedback and Multi-scalar Equality Rights

An important theme in the geographies of sexualities literature pertains to equality rights and access to space/place. In other words, when sexually diverse communities advocate for inclusion in education policy, they are seeking the right to have equal and safe access to school spaces. This type of claim for physical access to space, including educational spaces, is a key component of human rights struggles (Blomley 2001; Camalt 2007), especially since those who are advocating for rights are more likely excluded from these spaces because of structural barriers. For instance, while sexually diverse communities have physical access to school spaces, the way that these spaces are coded (Knopp 1995, 152) as heterosexual limits their access. This is evident through policies and/or practices that enforce gender binaries (bathrooms or how students are organized by boy/girl); through homophobic slurs and bullying (see Taylor and Peter 2011); or curriculum content that excludes issues of sexual diversity and if it is included, the content focuses on changing individual beliefs instead of structural inequalities (Loutzenheiser and MacIntosh 2004, 153-155).).

The equality section of the Canadian Charter is often used as a leverage to justify the inclusion of GSAs and other measures for creating inclusive school environments for sexually diverse students (Rayside, 2014; Stonefish and Lafreniere, 2015; Taylor and Peter, 2011; Taylor, 2007; Walton, 2004). However, equality rights geographically impact gender and sexually diverse communities differently. For example, Hubbard (2013) illustrates how rights obtained from one scale, such as the national scale are undermined at the local scale (229). One way to understand this difference is jurisdictional division of powers. For instance, courts may deem provincial legislation to be a Charter violation and read in Charter rights. The provincial government may then respond by limiting access to the services and/or spaces guaranteed by these rights or allowing for exceptions, such as the provincial government refusing to provide funding for needed services (White, 2013: 158-159). What this suggests is that even if the courts require provinces/territories to address inequalities in policy areas under their jurisdiction, provincial/territorial cooperation is necessary (White, 2013: 175).

In the case of education, one way in which the unequal distribution of rights might occur is when provincial education legislation stipulates schools and/or school boards create anti-bullying policies or an inclusive policy for sexually diverse students. If the development and implementation are at the discretion of local authorities, then there is a risk of uneven rights protection for sexually diverse students as some schools/school boards are less likely to support them. Moreover, religious-based arguments may be used as a reason not to explicitly address homophobia or create safe school environments for sexually diverse students. According to Hubbard, rights at the national scale, such as equality rights, can be undermined at the local scale for the “public good” (Hubbard, 2013: 229). In the case of education and sexually diverse communities, faith-based school boards may refuse to develop policies, such as GSAs or policies addressing homophobia/transphobia to protect their religious school communities. Additionally, education policy may implement national based rights for sexually diverse communities, but will do so in a way that maintains the status quo (Wilkinson, 2013: 206). For example, the first draft of Alberta’s GSA legislation suggested that if a school board refused to create a GSA, an alternative location, off school grounds, could be used (Legislative Assembly of Alberta, 2014). In this way, the argument could be used that sexually diverse students would have their right to a GSA.

Conversely, multi-scalar equality rights can also benefit sexually diverse students. Gorman-Murray (2011) states that planning initiatives at the local scale can include socially marginalized groups, and can make up for lack of inclusion efforts at the national or provincial scale (133). For example, the Edmonton School Board and the Toronto District School Board both adopted LGBTQ+ inclusive policies for their schools before there was policy support from the provincial scale. Furthermore, individual schools may initiate a GSA in their schools even though provincial GSA legislation does not exist. There are myriad ways that equality rights, and especially the right of sexually diverse students to access safe school spaces can be both undermined and enhanced at the local scale. The actions and inactions at the local scale can have a feedback effect at other scales (Gorman-Murray, 2011: 142), including in provincial education policy.

Integrating policy feedback and the relational conception of place/locality provides a dynamic view of gradual policy change. On the one hand, provincial education policy is a regulation mechanism that determines who has access to school spaces, as well as what type of access they have. This policy may be in line with the Charter and provincial human rights, but still attempt to maintain the status quo or, the policy may consist of measures to create safe school spaces for sexually diverse students. The policy may also undermine the Charter and provincial human rights legislation, which can result in court challenges. Additionally, the Ministry of Education and/or Minister of Education may look to other provinces or countries to review how they address the issue of creating safe school spaces for sexually diverse students.

Provincial education policy also dictates the roles of school boards and schools, including which policies they are responsible for developing and implementing. At the school and school board scale, Charter rights and provincial human rights may also be undermined for the ‘common good’ of a school community. However, there may also be initiatives at the local scale that supports sexually diverse students in ways that provincial education policy does not.

Additionally, there is potential for policy feedback as educational stakeholders, including school boards, parents, teachers, students, administrators and related advocacy groups attempt to reinforce or undermine provincial education policy. In this way, these groups, or put another way, networks of social relations, shape policy debates and influence policy change. This is a gradual process that has resulted in education systems changing in some cases from something that was explicitly exclusionary to inclusive of sexually diverse communities. The chapters on Alberta and Newfoundland/Labrador will demonstrate how this process unfolded through policy feedback mechanisms.

Chapter 3: Methodological Framework: Causal Mechanisms and Process Tracing

Introduction

In this chapter, I discuss the methodological framework guiding this research. In the first part of the chapter, I define causal mechanisms as used in my study. Following this definition, I discuss how the mechanisms of drift and layering can be identified. Next, I draw from the work of Bèland et al. (2022) and Falletti and Lynch (2009) to create a typology of causal mechanisms relevant for my analysis. In the second part of the chapter, I provide an overview of process tracing, particularly explaining-outcome process tracing. Then I discuss why Alberta and Newfoundland/Labrador were selected as case studies and how I conceptualize these as laggards and leaders. I then discuss data collection, which is followed by section on comparing case studies when using explaining-outcome process tracing.

Causal Mechanisms

Definition of Causal Mechanisms

Causal mechanisms have been defined in various ways; however, the most common understanding entails either a process, system or factor that explains how an initial condition(s) (x) causes an outcome (y) (Beach and Pedersen, 2013; Bunge, 1997; George and Bennett, 2005; Gerring, 2007; Grzymala-Brusse, 2011; Mayntz, 2003). In other words, mechanisms are the causal links between x and y that explain how and why change happens (Grzymala-Brusse, 2011:1268).

Causal mechanisms are often used in historical institutionalism and other types of historical analysis, especially when process tracing is the method of analysis (Kay and Baker, 2015; Wellstead, 2018). Process tracing, which I will elaborate on below, is a method that identifies causal mechanisms over a long period of time (Falletti and Lynch, 2009; Grzymala-Brusse, 2011). Additionally, policy feedback relies on causal mechanisms to understand how existing policies shape policies and politics (Bèland et al., 2022). These mechanisms can be either self-reinforcing, such as path dependency (Pierson, 1993) or self-undermining (Bèland et al., 2022; Jacobs and Weaver, 2015; Sewerin et al., 2020; Skogstad, 2017). I will provide more detail regarding self-reinforcing and self-undermining feedback mechanisms below.

Additionally, an examination of causal mechanisms can provide a greater understanding of policy-making. For instance, they can answer questions such as how policy change happened within a case study (Kay and Baker, 2015: 3), as well as how and why some decisions were made, while others were not (Van der Heijden et al, 2021; Wellstead et al., 2018). One thing to consider in answering these questions is how the interaction of mechanisms and context may generate different policy outcomes (Falletti and Lynch, 2009; Gerring, 2007; Paquet and Broscheck, 2017) in each province. For example, in 2012, the ministers of education gathered in Halifax for a meeting of the Council of Ministers of Education, Canada (CMEC). At this meeting, one of the topics discussed was anti-bullying initiatives and best practices for creating safe and inclusive schools in each of their provinces (CMEC, 2012). Therefore, the mechanism of learning, which is when new information influences the beliefs and ideas of policy-makers (Gilardi, 2010), occurred as the ministers shared what was happening in their education systems. Importantly, the mechanism in this scenario does not “determine” the outcome. For example, the specific reforms resulting from learning could be quite different, since the new information

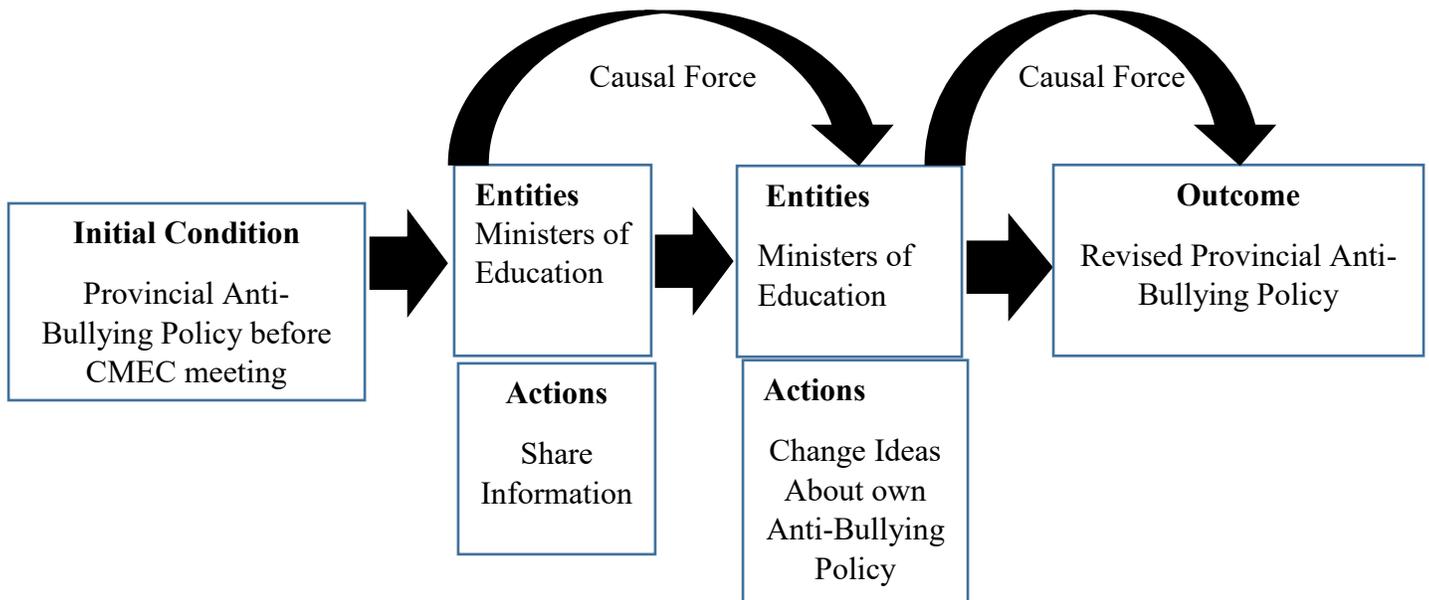
interacts with provincial policy-making contexts. Therefore, the same mechanism could potentially lead to a different outcome in each provincial context.

One thing that is important to note regarding causal mechanisms is the distinction between mechanism and variables. According to Beach and Pedersen (2013), many researchers refer to mechanisms as intervening variables (36); however, this definition does not consider the links between variables. Consequently, the causal explanation is ‘grey-boxed’ (see Bunge, 1997) by simply stating what the intervening variable is instead of showing how this variable causes the outcome (Beach and Pedersen, 2013; Hall, 2016). Mechanisms are more than just correlations (Beach and Pedersen, 2013; Falleti and Lynch, 2009; Mayntz, 2003), they are the transmission of a causal force. Beach and Pedersen (2013) further explain the idea of a causal mechanism. They state that:

Each of the parts of the causal mechanism should be conceptualized as composed of entities that undertake activities, as illustrated in figure 4.1. Entities engage in activities (the parts of the mechanism—i.e., toothed wheels), while activities are the producers of change, or what transmits causal forces through a mechanism (the movement of the wheels). Entities can be individual persons, groups, states, classes, or structural phenomena depending on the level of the theory. The theoretical conceptualization of the entities uses nouns, whereas activities should include verbs that define the transmitters of causal forces through the mechanism (Beach and Pedersen, 2013: 49).

What this means is that causation does not result from the mechanisms themselves. Therefore, in explaining a mechanism that generated change, it is necessary to show the entities and activities that happened *between* the independent and dependent variable and how these activities generated change. As mentioned above, entities encompass a wide range of possibilities. For instance, a policy entrepreneur or a network might be considered an entity. What is important about an entity is that it engages in an activity and the activity generates change. In the example above of the ministers of education and learning, the entities are the ministers of education who share information (the action) with each other. Learning happens when the sharing of information occurs, and the ministers of education change their ideas about anti-bullying policy and safe and inclusive schools. The ministers of education may then use this information to reform their own policies. Figure 1 illustrates a simplified diagram of these interactions since this mechanism consists of numerous parts involving entities and actions. For instance, once the ministers of education (entities) return to their provinces, then there are further interactions with other politicians, bureaucrats in the department of education, as well as stakeholders, media and advocacy groups before the education policy is changed. Additionally, as I will discuss below, policy change may result from multiple mechanisms operating simultaneously.

Figure 2 Feedback Mechanism of Policy Learning



Adapted from Beach and Pedersen (2013).

Policy Feedback Mechanisms

Policy feedback mechanisms, according to Béland, Campbell and Weaver (2022), are neither purely endogenous (policy induced) nor exogenous (environment induced). They state that most feedback mechanisms are an interaction of both. Additionally, different mechanisms can operate at the same time, even if the feedback effects have different directions. As discussed in the previous chapter, these directions can be self-reinforcing, self-undermining or mixed. (Béland et al., 2022: 41-42). Since I am using explaining-outcome process tracing to reconstitute the process of institutional change, I am interested in identifying the different mechanisms that contributed to this change and how these mechanisms operated simultaneously, as well as the interactions among them that generated change. Therefore, in this section, I have created a typology of policy feedback mechanisms that are relevant for my analysis. The three main categories include social-political mechanisms, information/interpretive mechanisms (see Béland et al., 2022), and power-based mechanisms (See Faletti and Lynch, 2009). While there are numerous mechanisms that can be identified in each category, I have focused on the mechanisms that are most relevant for my case studies.

Social-Political Mechanisms

Mass Attitudes

Policy design changes future political action by identifying target groups, as well as defining policy solutions, which influences how the public views a policy issue as well as target populations (Ingram et al., 2007; Mettler and Soss, 2004). When a policy distributes widespread benefits for the public, the public is more likely to support this policy (Béland et al., 2022: 57); however, the mass public may also undermine the policy if they are persuaded that policy change

is needed (Jacobs and Weaver, 2015: 447). In this way, the mechanism for mass attitudes focuses on the perceptions of public opinion (Béland et al., 2022: 57).

The visibility and traceability of a policy may impact the public perceptions and awareness of a policy. According to Pierson (1993), a policy is visible when there is an observable outcome, and it is traceable when this outcome is linked to some form of government action (622). Therefore, if a policy does not have visible outcomes and it cannot be traced to government action, then the public may not be aware of this policy. On the other hand, a policy that is highly visible and traceable is more likely to influence the perceptions of the public and mobilize support (Campbell, 2012; Mettler and Soss, 2004; Pierson, 1993). Contentious policy issues, such as sex education curriculum, are more likely to be visible and traceable. For example, in 2015, the Ontario Physical and Health Education Curriculum was changed to include teaching about gender and sexual diversity, consent and gender. This curriculum change became a publicly disputed topic and resulted in the formation of advocacy groups seeking to dismantle the sexuality curriculum. Furthermore, after Doug Ford's election in 2018, he repealed the curriculum, creating a backlash among the public. In 2019, Ford introduced a new health curriculum that was very similar to the one he repealed in 2018 (Bialystok et al., 2020). This example illustrates how a policy that had a visible outcome - introducing new topics into the curriculum - and could easily be traced back to government actions influenced the perceptions of the mass public and had a feedback effect in changing the curriculum in 2018 and again in 2019. Therefore, one way to identify public perceptions of policy are to trace the reactions of the public to policy change and how this feeds back into future policy and political decisions.

The perceptions of the mass public can also be influenced by the framing effects of political elites (Béland et al., 2022: 57). Framing effects occur when political elites are able to persuade the public that a policy change is needed, especially when the policy consequence is portrayed as loss for the public (Jacobs and Weaver, 2015; Skogstad, 2017). As a result, framing can self-undermine existing policies. However, political elites can also frame the status quo as a preferable option (Jacobs and Weaver, 2015). Regarding the example of sex education curriculum in Ontario in 2015, on the one hand, the old health education program was framed as needing change because it had not been updated since 1998 and lacked important topics such as gender and sexual diversity issues, as well as consent (Bialystok et al., 2020: 332). On the other hand, according to Bialystok et al. (2020), when Ford repealed the curriculum in 2018, he used populist language to create more opposition to the 2015 policy and stated that the previous government had not completed a 'proper consultation' (337). Therefore, Ford suggested returning to the 1998 policy would be preferable until parents were consulted. In both cases, attempts were made through framing effects to undermine and reinforce the previous 1998 health policy.

Organized Mobilization

Mass publics are not the only actors influenced by policy feedback. Policies also create incentives and provide resources for advocacy groups (Pierson, 1993: 601), as well as create new advocacy groups and expand existing ones (Stokes, 2020:40). Additionally, governments may rely on interest groups for policy advice (Allern and Bale, 2012: 8), while also facilitating change by recognizing the interest groups and their claims (Immergut, 1998: 20). Conversely, some advocacy groups may be weakened by policy if they lose resources and/or political support (Stokes, 2020).

Policy feedback has been important for LGBTQ activism in Canada because policy changes created opportunities for future organizing (Smith, 2015), such as the introduction of the Charter. Section 15 of the Charter (the equality section) provided sexually diverse communities with an institution to gain further rights, especially through litigation processes. As a result, gender and sexually diverse issues have been primarily framed as human rights' issues (Smith, 2005:84). One notable advocacy group for gender and sexually diverse communities in Canada is Egale Canada, which is a national organization that began in 1986 as an informal group of lawyers who wanted to use the Charter to advance rights for gender and sexually diverse communities. (Smith, 2005: 85). Therefore, Egale wanted to undermine policies that discriminated against sexually diverse communities.

Organized mobilization can often have a self-undermining effect when groups who are excluded and/or marginalized from existing policy are primarily those advocating to change it. In other words, they do not accept the status quo. However, this mechanism can also be self-reinforcing if advocacy groups benefit from the policy; therefore, they organize to prevent change from happening. Banack (2015) illustrates how this mechanism can be self-reinforcing in his discussion on faith-based groups in Alberta, who advocated against changing Alberta's education legislation to include GSAs. By advocating against this change, faith-based groups were reinforcing the existing education legislation.

Information/Interpretive Mechanisms

Policy Learning

Policy learning has been defined in various ways, but in general, it is a process in which policy actors change their beliefs in response to past experiences or new information (Hall, 1993; May, 1992; Pierson, 1993; Sabatier, 1988; Weible and Sabatier, 2007). As these beliefs change over time, policies may also change (Weible and Jenkins-Smith, 2016). Two main types of policy learning are instrumental learning and social learning. Instrumental learning focuses on policy instruments and implementation and how these are altered as policy actors' beliefs about a policy issue changes. Social learning happens when policy actors' beliefs about a policy's problem, scope, goals or solutions either change or are reaffirmed because of past experiences or new information (May, 1992). Moreover, Hall (1993) makes a distinction between different learning processes, and categorizes these as first order, second order and third order change. First order change entails changes in instrument settings, while policy instruments and goals remain the same. Second order change occurs when policy instruments and their setting change, but policy goals are the same. Finally, third order change is when policy instruments, their settings and the policy goals change. In other words third order change is a change in a policy paradigm (278-279)

Policy learning is prominent in the advocacy coalition framework, especially since actors within this framework try to transform their beliefs into policy by influencing government decisions (Pierce et al., 2017; Sabatier, 1988; Weible and Jenkins-Smith, 2016; Weible and Sabatier, 2007). Policy learning is also a mechanism found within the policy diffusion literature. In the case of policy diffusion, learning may result in one jurisdiction adopting a policy that was successful in another jurisdiction (Gilardi, 2010; Maggetti and Gilardi, 2016; Wallner, 2014). In this way, policy learning can occur across different countries and scales of government. For the purpose of my project, policy learning is understood as a mechanism of policy feedback (Pierson,

1993), particularly the ways that policy actors revise their policies in response to their own belief and ideological changes.

Elite Attention

As mentioned in chapter 2, in PET, decision makers' limited attention span influences the amount of information they process (Jones and Baumgartner, 2012: 3-7). One of the ways of overcoming this limitation is through the use of policy subsystems where multiple policy issues can be considered within policy monopolies. Since policy monopolies are less likely to experience outside pressure for change unless there is high issue salience (Baumgartner and Jones 2009, 8), the status quo is maintained. Therefore, the elite attention mechanism is self-reinforcing when there is low issue attention outside of the policy monopoly and limited attention by elites. However, when a focusing event increases issue salience and group mobilization outside of the policy monopoly, there is a possibility for undermining existing policy (Béland et al., 2022: 59).

Social Construction of Target Populations

Schneider and Ingram's theory of the social construction of target populations (SCTP) was developed to understand why public policies sometimes fail to solve problems and why they create unequal citizenship (Ingram et al. 2007, 93). In their theory, they state that social constructions can refer to target populations or knowledge, and are images or stereotypes that reflect the various discourses and beliefs that have been normalized as true and are created by politics, culture, socialization, history and the media (Schneider and Ingram 1997; Schneider, Ingram and DeLeon 2014). The way that target populations are socially constructed (positive or negative), as well as the amount of political power they have results in differential policy effects. For example, Schneider and Ingram (1993) state that those with positive social constructions and who have political power are the advantaged and more likely to receive benefits. Contenders have negative social constructions, but political power, therefore, this group receives benefits, but they are more likely to be hidden. Dependents have positive social constructions, but no political power. They are viewed as 'good' people, but not as deserving of benefits in the same way as advantaged groups. Deviants have no political power and negative social constructions. This group is more likely to receive sanctions than benefits (336).

Social constructions also become embedded in policy designs in various ways, such as the construction of target groups, how issues are framed, implementation structure, policy tools, and underlying assumptions. In this way, social constructions send messages to the public and target populations about how the latter are viewed and the importance of their issues (Schneider and Ingram 2008). These messages will influence the future political participation of target populations. The social construction of target populations in policy design has a feedback effect on target populations (Schneider et al., 2014), on policy framing (Reich and Barth 2010; Rigby et al. 2007), political participation and mobilization (Mettler and Soss 2004; Pierson 1993), as well as issues of political voice, equality and access (Schneider and Sidney 2009, 109). Therefore, when the social constructions positively construct target populations as deserving of benefits, this mechanism is self-reinforcing, and when the social constructions negatively construct target populations as underserving, this mechanism is self-undermining as negatively constructed groups may challenge the policy and these constructions (Béland et al., 2022).

Power-Based Mechanism

Boundary Control

Boundary control is a mechanism used in federal systems to prevent the encroachment of national governments in subnational jurisdictions, while maintaining the autonomy of subnational governments (Broscheck, 2021; Falleti and Lynch, 2009; Gibson, 2012). According to Broscheck (2021), this mechanism is useful for studying how provincial governments maintain power over education in Canada. He states that boundary control has been used in education to institutionalize the central authority of provincial governments within their jurisdictions (455). For example, while school boards have some autonomy, they are still regulated by provincial education legislation. Another way that boundary control happens is through the CMEC, especially since one of the primary reasons for the CMEC's existence is to ensure that the provinces retain constitutional jurisdiction over education with limited interference by the federal government. (Broscheck, 2021).

Furthermore, boundaries have been used in policy design to exclude or marginalize certain groups, which influences how benefits and services are distributed, including access to public services. Boundaries determine who is entitled to benefits and services, how much they receive and the conditions of eligibility (Fawcett et al., 2018; Kreitzer et al., 2014). While boundary control mechanisms can be about territorial boundaries and the rules for those within these territories (Gibson, 2012), it may also apply to the values and ideas of policy actors (Fawcett, 2018), and in particular, to moral boundaries (Kreitzer et al., 2014).

Debates about moral issues in educational policy change, such as issues related to sexual diversity, can be viewed as a form of boundary control. Since policies concerning morality issues are also about social values, there is a lot of contention over this type of policy change (Hurka et al, 2018). In particular, debates concerning the moral education of children (Robinson, 2008) are difficult as various stakeholders negotiate the boundaries of what should be included in public education. One way in which this debate manifests is through arguments about parents' rights to educate their children according to religious beliefs when there are attempts to introduce sexually diverse related curriculum (Banack, 2015). Those who advocate for change are trying to undermine existing moral boundaries in education policy, while those resisting change are trying to reinforce those boundaries.

Table 1 Policy Feedback Mechanisms

Mechanism Type	Causal Mechanism
Socio-political Mechanisms	Mass Policy Support
	Mass Policy Loss
	Organized Mobilization
Informational/Interpretive Mechanisms	Policy Learning

	Elite Attention
	Social Construction of Target Populations
Power-Based Mechanism	Boundary Control

Drawn from Bèland, Campbell and Weaver (2022) and Falletti and Lynch (2009)

Overall, this typology of mechanisms provides a general overview of the mechanisms of change identified in my analysis through process tracing. The mechanisms that were identified are discussed in chapters 4 and 5 to explain how provincial education systems in Alberta and Newfoundland/Labrador changed. The next section will discuss process tracing, which is the method I use to identify the relevant mechanisms process of policy change in each province.

Process Tracing

Process tracing is a within case study method that makes causal inferences by tracing mechanisms to understand how a cause produces a particular outcome (Beach, 2016; Beach and Pedersen, 2013; Blatter and Haverland, 2014; George and Bennett, 2005). However, as George and Bennett (2005) highlight, causal processes are not narrowly defined. They can be linear with a chain of events, they can be more complex with multiple converging causal chains, they can entail interacting causal variables, or they may occur over time in a sequence of events. Since there are numerous variations of what a causal process may look like, there are important factors to consider when process tracing, such as considering alternative explanations and the concept of time.

Considering alternative explanations, according to Bennett and Checkel (2015), strengthens the results obtained from process tracing, especially when the evidence does not align with the alternative explanations. One way to consider alternative explanations is to assess the empirical evidence with explanations given by experts in the area, as well as the understanding of interviewees. While some explanations may be rejected because the evidence does not support them, others may require more evidence (Bennett and Checkel, 2015: 23). In considering alternative explanations, it is also important to ensure that this process is done without bias of the researcher (Mahoney, 2015: 202) and by considering possible biases of the interviewees and other sources of evidence (Bennett and Checkel, 2015). Exploring alternative explanations is important because it accounts for equifinality (George and Bennett, 2005), which is when there are multiple causal pathways to the same outcome (Falletti and Lynch, 2009; George and Bennett, 2005; Kay and Baker, 2015).

The concept of time is also important for process tracing analyses, especially since causal mechanisms have different temporal patterns. For example, rapid institutional building, which can be observed in short time periods, will not likely include consultations since these take time (Grzymala-Brusse, 2011); whereas, incremental causal mechanisms may only be observed after a longer period of time (Beach and Pedersen, 2013; Grzymala-Brusse, 2011). In this way, time is significant for observing gradual institutional change, especially since mechanisms like drift, layering, or changes in societal perceptions are slow processes that can only be observed over a longer duration. As a result, process tracing is often used for historical explanations (Mahoney, 2015: 202).

Additionally, Grzymala-Brusse (2011) emphasizes the importance of making a distinction between timing and sequences. She contends that the same event can have a different effect as a result of when it occurred rather than the sequence in which it happened (1289-1290). Grzymala-Brusse (2011) states that analysing timing requires identifying the broader context because this context, and how it changes will determine the outcome. Sequencing, on the other hand, is emphasized in path dependent analyses (1289). The path dependent argument is that the sequence of events determines the outcome, and once this sequence is in place, there is less chance of an alternative path being chosen (Pierson, 2004, 13).

Overall, process tracing needs to consider various things, including how causal mechanisms and causal processes are conceptualized, temporal considerations, alternative explanations as well as other factors, such as whether the results are generalizable to other cases, and whether the method is theory centric or case centric.

Three Variants of Process Tracing

In order to understand the differences among the various types of process tracing and what each one entails, Beach and Pedersen (2013) made a distinction between three variations of process tracing. These variations include theory testing, theory building and explaining-outcomes process tracing. Understanding the differences among these are important since each variant will differ in terms of understanding the generalizability of causal mechanisms, the types of causal inferences made, as well as whether the variant is theory centric or case centric (3).

Theory testing process tracing is a deductive method that tests if a hypothesized causal mechanism is present within a case study in which x and y are both known. This method then entails questioning if the mechanisms functioned as expected. What is being traced in this case is the theorized mechanism (Beach and Pedersen, 2013: 11-14). Theory building process tracing is an inductive approach that begins with the evidence to theorize a systematic causal mechanism that can be generalized. This type of process tracing is used in two situations. One is when there is a known correlation between x and y, but the mechanism that links them is unknown and the other is when the outcome is known, but not the cause or the mechanisms. (Beach and Pedersen, 2013: 16-18). Finally, explaining-outcome process tracing is an iterative case centric method that 'attempts to craft a minimally sufficient explanation of a puzzling outcome in a specific historical case' (Beach and Pedersen, 2013: 11). In this way, the analysis is case specific and can include a combination of a wide range of mechanisms, including systematic and non-systematic (case specific) mechanisms to explain complex social problems. This type of process tracing is context specific and cannot be used to make generalizations outside of the case study. Instead, the focus is more on the outcome itself rather than testing or building a theory (Beach and Pedersen, 2013: 12-13).

Explaining Outcome Process Tracing

Explaining outcome process tracing is an iterative process that looks for all possible causes of an outcome within a particular case. In other words, it looks for a minimally sufficient explanation. The first step entails testing a theory as a causal mechanism to determine if it explains the outcome. If the theory is insufficient to offer an explanation, then other theories can be tested. Alternatively, the explaining outcome variant can use an inductive approach. Using an inductive approach, the researcher begins with the empirical data and traces back to find the causal mechanism (Beach and Pedersen, 2013: 18-21). Beach and Pedersen (2013) state that there are

three strategies that can be used to develop a minimally sufficient explanation. These include, combining mechanisms (eclectic theorization), developing new theories, or including non-systematic (case-specific) mechanisms. (65). Combining mechanisms is a way to illustrate the complexity of policy change, which contrasts with theory building process tracing in which the focus is on one mechanism (Beach and Pedersen, 2016). The third strategy is including case-specific mechanisms, which are not generalizable to other cases. These are the mechanisms that help with understanding how context influenced policy change. Including non-systematic mechanisms is necessary because I contend that provincial context plays an important role in provincial educational policy-making. Therefore, by including case-specific mechanisms, I will illustrate how context is important for explaining how change happened in each province.

My interest in using explaining-outcome process tracing is to reconstitute the process of institutional change (Paquet, 2019: 29) that resulted in Alberta and Newfoundland/Labrador changing their education systems. I chose to use explaining outcome process tracing because it allows for a closer and more detailed examination of policy change in each province. I chose this variant over theory building because the latter focuses on hypothesizing about one systematic mechanism that can apply in different cases, whereas explaining outcome is an ‘eclectic conglomeration’ of systematic and non-systematic mechanisms and very context specific (Beach and Pedersen, 2013: 16). In other words, explaining-outcome process tracing accounts for the complexity of policy change and the context in which these changes occur. By tracing mechanisms within a specific case and considering the context of this case, I can illustrate how converging scales at the provincial level shaped educational policy change, as well as the role that the diverse contexts of each province have in provincial policy-making processes. In the next section, I will discuss case selection, data collection, as well as comparison.

Case Selection

In explaining-outcome process tracing, the focus is on a puzzling outcome (Beach and Pedersen, 2013: 91). Therefore, I chose Alberta and Newfoundland/Labrador as my case studies because each of these provinces went from laggards to leaders. I conceptualized Alberta as a laggard because, on the one hand, it was the last province to change its human rights legislation to include sexual orientation. This change was the result of the Vriend decision by the Supreme Court of Canada in 1998. The case began in the early 1990s when Vriend was fired from his job at a Christian college in Alberta because he was gay (Cossman, 2002: 231), and wanted to file a case of discrimination based on sexual orientation with the Alberta Human Rights Commission. He was told that the commission could not help him because sexual orientation was not included in Alberta’s human rights legislation. Vriend asked the Alberta Court of Queen’s Bench to include sexual orientation in the human rights legislation and the judge agreed. However, the Alberta government successfully appealed this decision with the Alberta Court of Appeal (Cossman, 2002; Ghitter, 2001: 11). Vriend then took the case to the Supreme Court of Canada where the court ruled that the Alberta Individual Rights Protection Act was in violation of section 15 of the Charter and that the limitation on this right was not reasonable. As a result, sexual orientation was ‘read in’ to Alberta’s Individual Protections Act (Cossman, 2002; Kelly, 2001), and required that all Canadian provinces and territories prohibit discrimination against sexual orientation (Egale, 2022).

Yet, Alberta took another eleven years for sexual orientation to be officially included in Alberta’s human rights legislation in 2009. Included in the legislation was the controversial

section 11.1 that stipulated that parents need to be informed if teachers were going to educate about religion, sexuality and sexual orientation, even though a similar clause was already present in the Education Act (Rayside, Sabin and Thomas, 2012: 11). The reason given for the inclusion of section 11.1 was to balance human rights related to sexual orientation and parents' rights to choose how their children are educated (Gereluk et al., 2015: 4). In other words, section 11.1 was balancing sexually diverse students' rights and parents' right to school choice (Banack, 2015; Bosetti and Gereluk, 2016). Alberta was the only province to include a discriminatory exception such as section 11.1 in its human rights legislation. I conceptualize Alberta as a leader because it ended up with one of the most comprehensive LGBTQ+ legislation in the country (Wells, 2018).

I have conceptualized Newfoundland/Labrador as laggards for two reasons. First, they were similar to Alberta in delaying changing their human rights legislation to include sexual orientation. The Newfoundland/Labrador Human Rights Commission, based on the Haig decision, read in sexual orientation in 1993, as did a Newfoundland/Labrador Supreme Court judge in 1995 (Warner, 2002; Wintemute, 2004). Despite these judicial decisions, formal legislative changes did not occur until 1997. The second reason for conceptualizing them as laggards is because Newfoundland/Labrador amended Term 17 in 1998, which changed its education system from a multi-denominational to a secular system (Heerema, 2005: 113). This change was significant because under the multi-denominational system, homophobia was prevalent within the school system, and teachers, especially sexually diverse teachers, did not have any rights. In fact, by-laws were in place that excluded teachers from provincial human rights protections (Shortall, 1998).

I conceptualized Newfoundland/Labrador as leaders because they were the first province to introduce a government-led initiative to support sexually diverse communities in schools across the province. The government provided \$90 000 in funding for MyGSA resources to assist with creating GSAs in the province and another \$100 000 to educate teachers and administration on issues related to gender and sexual diversity. (Newfoundland and Labrador Department of Education, 2014: 29). These initiatives were highlighted by Egale at an international conference as best practices on creating safe and caring school environments (House Assembly, 2017). Furthermore, as explained in chapter 5, this initiative was part of the provincial Violence Prevention Strategy, which meant that not only was it supported by the Minister of Education, but at a broader government scale. Finally, as chapter 5 will show the implementation of this initiative was also supported and enforced by the Minister of Education. While neither province remained leaders and in fact, it can be argued that Alberta once again became a laggard, these provinces are still relevant for my research because I am interested in the process of policy inclusion and what lessons can be drawn from these cases. My framework will account for these dynamic changes.

Data Collection

The analysis relied on documentary sources and data from interviews with elite actors. Documentary sources included provincial government publications from the ministries of education websites, including annual reports, media releases, strategic plans, action plans, safe and caring school policies, bullying policies, curriculum documents, provincial guidelines for creating inclusive school environments, and legal decisions. On the Alberta Education website, I searched through the section on 'education supports', as well as 'legislation and regulations.' Additionally, I searched for annual reports, strategic plans and media releases. On the

Newfoundland/Labrador Department of Education website, I searched the ‘Kindergarten to grade 12’ section, the ‘publications’ section, the ‘news release’ section and the ‘curriculum guides’ section. From the documents found in each section/search, I identified those that referenced LGBTQ+ students and/or issues, which provided details on provincial education policies and programs that are relevant for sexually diverse communities. Additionally, these documents were used to identify key organizations, actors and/or other provinces that contributed to education policy in Alberta and Newfoundland/Labrador.

I also accessed and consulted on the respective websites documentary sources related to LGBTQ+ communities from the teachers’ associations in Alberta and Newfoundland/Labrador, school districts/school boards, other relevant departments, such as Status of Women in Newfoundland/Labrador, and the human rights commissions. At the national scale, I collected sources from the Council of Ministers of Education, Canada, the Canadian Teachers’ Federation and EGALE Canada. These documents provided information on the role that these organizations had in provincial educational policy-making and in some cases, opposed proposed government legislation.

In order to better understand why each province changed their education policies, my analysis relied on Hansard debates, legislative committee meetings, and Speeches from the Throne. According to Paquet (2019), the Hansard, which are transcripts of legislative debates, are a valuable source of information, which include debates of all elected members, including the opposition (31). Additionally, the Hansard debates were useful for identifying key actors, organizations, events, other departments and scales of government that were involved in the process of policy change. The Hansard debates were also useful for understanding which legislative decisions allowed the use of free votes. This is significant because in Canada, Cabinet, which is comprised of ministers, is a collective government. What this means is that the ministers have a constitutional obligation to support government decisions regardless of personal beliefs and they are responsible to the legislature for actions within their own ministries (Dunn, 2008; Thomas and White, 2016; White, 2001). However, when using a free vote, members are able to vote according to their own beliefs (Overby et al., 2011: 465). Therefore, when a free vote is documented in the Hansard, we can see when and where there are dissenting views among the governing party’s caucus. In Alberta, I accessed the Legislative Assembly of Alberta website and in Newfoundland/Labrador, the Newfoundland and Labrador House of Assembly website. When seeking specific Bills in which I knew the date, I accessed the relevant Hansard debates. Additionally, I conducted a keyword search on each website from 1997 until 2009 for education and sexual orientation, as well as references to LGBTQ, sexual diversity, GSAs, bullying, inclusive schools and safe schools.

The research also drew from news media to have a better understanding of the context surrounding the issue of sexual diversity in education, as well as some of the non-legislative decisions and/or actions by the governments to support sexually diverse students in school environments. News media was also useful for understanding the opposing positions of religious leaders who resisted policies that addressed sexually diverse related issues in education. Additionally, secondary sources were used to gain a better understanding of the political, social and economic context of each province’s education system, especially in the context of sexual diversity. I conducted a search using the Concordia library website for relevant news sources, I searched for links to news related media on the government and non-government websites that I accessed, as well as a google search for news media.

Another valuable source of information was semi-structured interviews with elite actors. The interviews included elected officials (both current and retired), bureaucrats who were no longer employed with the ministries of education, as well as community actors who advocated for and/or worked with the ministries of education in the context of sexually diverse related education initiatives. In this dissertation, I use pseudonyms for my interviewees to protect confidentiality. Some of my interviewees agreed to have their name appear in the dissertation, including direct quotations, while others agreed to have their name in the dissertation, but not for direct quotes. Therefore, I mostly use pseudonyms and when I use an interviewee's real name, I will indicate this in the citation.

I recruited my interviewees in four ways. One, I searched relevant organizational websites and contacted the interviewees by email. Two, I searched political party websites for each province and contacted relevant MLA/MHAs. Three, I completed a google search of names of relevant actors who were no longer working in politics and/or the relevant organizations to find a public contact number or email. If I was able to find this information, I then contacted them and requested an interview. Finally, I was either placed in contact or given the names and contact information of potential sources by my interviewees.

While I asked similar questions to interviewees who were elected officials and those who were bureaucrats or from non-governmental organizations, I also had a different set of questions for each group (elected officials and bureaucrats/NGOs). For example, with elected officials, I asked when their political party became involved in the issue of sexual diversity and education, while I asked the other interviewees when their respective organizations became involved. In both cases, I asked what they interpreted as the main concerns experienced by sexually diverse students in schools. I asked elected officials questions such as the actions their political party took regarding sexual diversity and education, if there were consultations/partnerships, if there were other departments/agencies involved, if the geography of the province influenced policy design, whether there were any external factors (events, religion, media, etc.) that affected decision-making, and if there was resistance by other parties/society. As for the NGO's, I asked if they participated in government discussions regarding sexual diversity and education, if/how they were involved in the policy process, if they were involved in coalition building and if they were satisfied with current policy (see Appendix A for interview questions).

In this way, I was able to interview sources who were directly involved in the process of changing education policy in each province. Additionally, I was able to obtain valuable behind the scene information regarding provincial policy-making, including the use of institutional rules as a strategy to generate change. In some cases, the interviews filled in gaps from the secondary literature, as well as from documentary evidence. One disadvantage of the interviews was that some of the interviewees had not been involved for numerous years; therefore, they had some difficulty remembering all of the details. While this type of memory lapse reduces the reliability of the interviews (Beach and Pedersen, 2013; Tansey, 2007), the information obtained from interviewees was cross-referenced through triangulation with other existing data, such as Hansard debates, secondary sources, and provincial government documentary sources. This type of triangulation is helpful for confirming information from each of the data sources (Tansey, 2007).

As for data analysis, I transcribed the interviews and then coded them using a deductive and inductive approach. On the one hand, I used a deductive approach by drawing from the policy feedback mechanisms identified by Béland et al. (2022) and causal mechanisms identified

by Faletti and Lynch (2009) to code the interviews. Based on the results of my analysis, I created a typology of feedback mechanisms relevant to my case studies (see appendix B). On the other hand, I used an inductive thematic analysis to identify themes derived from my data. I have attached these codes in appendix C. Additionally, I analysed the Hansard transcripts with the same deductive and inductive approach used for my interviews.

Comparison

Since I am using explaining-outcome process tracing, the results of each case will not be generalizable because they will include both systematic and non-systematic mechanisms. Non-systematic mechanisms are case-specific, which means they may not be relevant in other cases (Beach and Pedersen, 2013: 13). In this way, case-centric studies cannot be integrated with other research methods, including comparative methods (Beach and Pedersen, 2013: 157). However, this does not mean that I am limited to only drawing conclusions about one case study. Comparison can entail asking what lessons can be learned from each case (Beach and Pedersen, 2013: 157). Therefore, in my concluding chapter, I will discuss and compare how theorizing provincial educational policy-making as a locality enabled me to explain the process of each province changing their education system and how this process was relational. I used two case studies for this project to compare how the policy feedback mechanisms identified explain gradual institutional change in each province. In the next two chapters, I will show the results of my process tracing analysis in the case studies of Alberta and Newfoundland/Labrador.

Chapter 4: Case Study 1: Alberta

Introduction

The Alberta government passed the most comprehensive gay-straight alliance legislation in Canada, and most likely the world. Alberta is now an unlikely leader in LGBTQ inclusion and the protection and support of vulnerable LGBTQ youth (Wells, January 3, 2018).

The issue of sexual diversity in education policy has been contentious in Alberta, especially in the context of faith-based education. As a result, there have been many debates about how changes in education legislation will affect the rights of parents to educate according to their religious beliefs. For this reason, the School Act/Education Act⁵ is a locality where various networks of social relations come together and debate the rights of sexually diverse students to safely access school spaces. By tracing these changes and analysing the results, I identified key feedback mechanisms that have generated legislative changes. In this chapter, I will provide the results of my analysis and explain how each feedback mechanism has contributed to change in Alberta. In the first half of this chapter, I will provide a discussion on school choice, followed by an overview of the political context in the province. Then, I will introduce key legislative changes in the context of sexual diversity and education. The second half of the chapter will discuss the results of my analysis.

Alberta Education and School Choice

Understanding school choice in Alberta and the tensions that emerge during debates are essential for explaining how Alberta changed from a laggard to a leader. Alberta's adherence to school choice is related to its populist political culture, which entails a mistrust of government and a celebration of 'common people', as well as the benefits of marketization (Banack, 2015). This section will provide an overview of the education options that parents have, which have been shaped over time through negotiations (Heyking, 2019: 1). Moreover, as I will illustrate below, arguments over school choice have continued to evolve in legislative debates concerning sexual diversity and education policy. For this reason, it is necessary to have a general understanding of school choice options in Alberta. In this section, I will focus on the options that manifest in debates over GSA legislation. These include schools under the umbrella of public education (public schools, separate schools and Francophone schools), private schools, charter schools and home schooling.

Central to the concept of school choice is the market-based idea that providing numerous schooling options for parents generates competition among schools, which in turn leads to improving academic performance. This market-based idea was important to education reforms by Ralph Klein's government (Banack, 2015; Garcea, 2014). Beginning in 1994, the reforms entailed moving power away from school boards towards the department of education and individual schools (Garcea, 2014). There were plans to reduce the number of school boards, school council legislation (Chan et al., 2007; Garcea, 2014, Webber, 1995), as well as increase school-based decision making (Chan et al., 2007). Additionally, there were funding cuts, and the

⁵ The School Act was the education legislation during the time period for my study. However, during this period, the Education Act, which did not come into effect until September 2019, was being developed and amended. Therefore, the legislative changes that I discuss are primarily referring to the School Act. When I specifically refer to changes in the Education Act, I refer to this legislation.

creation of a more centralized funding system under the Department of Education (Chan et al., 2007; Garcea, 2014; Riep, 2021a). As a result, school boards were unable to use their own tax rates to generate funding for schools. According to the provincial government, this change would create a more equal funding system; however, the reforms were also meant to promote competition among schools (Riep, 2021a: 4-5).

School Choice Options

Public education in Alberta consists of public schools, separate schools and Francophone schools. Both public schools and separate schools are fully funded public systems. As mentioned in chapter 1, Canada's Constitution Act, 1867, guaranteed that Roman Catholic minorities could have separate, yet publicly funded education systems. Therefore, when Alberta entered Confederation, the Alberta Act of 1905 ensured that both public and separate schools would be publicly funded (Heyking, 2019; Taylor, 2001b). Public schools are governed by an elected school board, are accessible to all students, and follow the provincial curriculum. Separate schools are the same as public schools with the exception that they teach according to Catholic or Protestant beliefs, while Francophone schools uphold the French language. (Banack, 2015; Riep, 2021a). Additionally, the concept of alternative schools in Alberta began under the PC government in the 1970s (Wagner, 1999: 55-56), and was legislated in the 1988 School Act. This legislation allowed for alternative education programs within public school systems. These programs could be based on language, culture, subject-matter or religion, which meant that faith-based education programs could be created within the public system (Heyking, 2019; Rayside et al., 2012; Taylor, 2001b).

In Alberta, accredited private schools receive up to 70 percent of the per pupil grant available to public schools (Banack, 2015; Heyking, 2019). This funding comes from provincial revenues and is supplemented by charging tuition fees and fundraising by the schools (Riep, 2021a). However, since many private schools are faith-based, the tuition costs are affordable so that faith-based parents can choose this education for their children (Banack, 2015; Heyking, 2019). Public funding of private schools began in 1967 under the Social Credit government, but at a low amount. When the PC government came to power in 1971, they responded to demands for increased funding for private schools by changing the funding formula, which would increase the amount of public funding private schools received (Rayside et al., 2012; Wagner, 1999). Since accredited private schools receive public funding, they must also follow the Alberta curriculum.

Charter schools were introduced under the Klein government in 1994, and in Canada, this choice is only available in Alberta (Rayside et al., 2012; Heyking, 2019). The introduction of charter schools not only increased the choices that parents have, but also increased competition. For example, the procedure to begin a charter school required that an individual or group first approach their local school board and ask the board to introduce an alternative program. If the school board declined, then the person/group applied to the Minister of Education for a charter school (Heyking, 2019; Riep, 2020; Wagner, 1999). In this way, school boards may face pressure from parents to offer alternative programs (Rayside et al., 2012: 20). Charter schools, similar to public schools, receive per pupil funding from Alberta Education; however, transportation costs are not publicly funded. As a result, parents who send their children to charter schools still have fees (Heyking, 2019: 3). Additionally, charter schools are non-profit and they are the only schools in Alberta that cannot be based on religion. Charter schools are not governed by a public

school board, but by a Charter board (Heyking, 2019; Taylor, 2001b), which is comprised of a board of directors (Riep, 2020). While charter schools follow Alberta curriculum, they operate under alternative programs not offered by school boards (Wagner, 1999; Riep, 2020).

The 1988 School Act also included home schooling, which broadened the number of schooling choices for parents (Rayside et al., 2012; Riep, 2021b; Wagner, 1999). The 1988 legislation stated that students who were home schooled needed to be supervised by a school board, and this could be any school board in Alberta regardless of residence (Wagner, 1999; Taylor, 2001b). Consequently, the school boards received per pupil funding, of which they would give a portion to the parents. Small rural school boards used this arrangement as an opportunity to improve their financial situation by agreeing to supervise home schooled children who did not reside in their jurisdiction (Wagner, 1999: 63). There are two organizations in Alberta that advocate for home schooling families. One is the Alberta Home Education Association (AHEA), which was created in 1986 and consists of faith-based parents who want to teach their children according to religious beliefs. The second organization is the Alberta Homeschooling Association (AHSa), which advocates for the primacy of parental rights over government (Riep, 2021b, 5). Reasons why homeschooling may be an option for parents include the desire to teach children according to religious beliefs instead of what is taught within schools, unsafe school environments or because of parents' negative school experiences (Riep, 2021b: 12-13). The issue of school choice permeates throughout the debates over changing education legislation to support sexually diverse communities. Next, I will provide an overview of the political context in Alberta.

Alberta Political Context

Alberta has been one of Canada's most conservative provinces, with the Progressive Conservative (PC) party forming government for over forty years from 1971, when it defeated the Social Credit Party (Levin, 2001; Taras, 2019; Wagner, 1999) until 2015, when the PC's were defeated by the New Democratic Party (NDP). Alberta's PC government was able to retain its power because of its rural support and its populist politics (Banack, 2015; Taras, 2019). One of the reasons that rural support was significant for the PC government was that the rural areas, which included many religious conservatives, had an overrepresentation of members of the legislative assembly (MLAs); therefore, retaining rural support was important for political power. (Banack, 2015; Taras, 2019; Webber, 1995). However, the emergence of the Wildrose party, which formed in 2008, posed a threat to the PC government as Wildrose gained the support of rural Albertans, and as they became advocates for faith-based parents (Banack, 2015; Taras, 2019).

Additionally, opposition parties, such as the Liberals and NDP, have had only minor roles in the legislature (Taras, 2019: 23). Private members (both government and opposition) who hold the government accountable for its actions and scrutinizes legislative proposals do not have the capacity to complete their role. Private members only have a small time per week dedicated to their business. As a result, they mostly bring forward resolutions instead of introducing bills since there is little prospect of their bills' success. In this way, cabinet members often dominate the policy-making process and this is similar for all of the provincial legislatures (Thomas and White, 2016: 374-379; White, 2001). For example, an interviewee, who is a former MLA, stated that there are no mechanisms for the opposition to introduce a policy idea. What exists is a type of lottery for private members' bills where all government backbenchers and opposition members

have the opportunity to place their name in a draw for a private members' bill. As a result, opposition members have little chance of changing policy.

Furthermore, the political system influences if there is acceptance/resistance to LGBTQ+ policy inclusion. For example, according to Banack (2015), a 2014 poll showed that individuals who opposed GSAs were mostly outside of the major cities, Edmonton and Calgary. He also states that voting records demonstrated that the majority of PC MLAs who opposed mandatory GSAs represented ridings outside of Edmonton and Calgary (Banack, 2015: 947-948). Considering there were many religious conservatives in rural areas, an overrepresentation of rural MLAs in the legislature, and opposition from both the population and PC MLAs outside of the major cities, Edmonton and Calgary, there is a greater risk of resistance to policy change with respect to sexual diversity (Banack, 2015). Therefore, with the PC government in power for over forty years, and limited capacity for private members to change legislation, the Liberals and NDP had little opportunity to change education policy in the context of sexual diversity. Consequently, how Alberta ended up with the most comprehensive GSA legislation in the country is an interesting case study.

Educational Policy Changes

In 1993 and 1994, the Minister of Education held two forums on student conduct and violence in schools, which was followed in 1996 by the announcement of a Safe and Caring School Initiative (SACS). The SACS initiative was part of the Klein government's three year business plan for education (McMullen, 1999), and aimed to reduce violence in schools. However, instead of focusing on violent incidents, the initiative focused on positive outcomes. The initiative included an advisory committee, which consisted of representatives from numerous government departments, including education, as well as representatives from all parts of Alberta's education system. Additionally, there were numerous government funded projects to promote safe and caring schools (Saunter, 2001).

In 1999, an emphasis was placed on diversity with the amendment of the School Act by stipulating that education programs must reflect the diversity of Alberta society and promote respect for others (Chan et al., 2007; McMullen, 1999). Regarding harassment due to sexual orientation, on the one hand, the SACS initiative acknowledged that some school boards had taken steps to address this issue. On the other hand, the initiative stated that school boards could decide whether to address homophobic harassment through policy (Alberta Learning, 1999). Therefore, the responsibility of protecting sexually diverse students through policies was left to the discretion of the school boards. In 2000, the Schools Act was again amended with Bill 206, which required school boards to create policies on student conduct (Chan et al., 2007: 36). The references to diversity and safety in these pieces of legislation did not explicitly include sexual orientation.

In 2006, Bill 208, Protection of Fundamental Freedoms (Marriage) Statutes Amendment Act added sexual orientation to the definition of marriage. However, this legislation also amended the School Act by permitting educators to refuse teaching that marriage is between same-sex partners, and it allowed students to be excluded from these discussions without penalty. The bill also stated that parents were to be notified if this issue was to be discussed in the curriculum. A similar exemption was added in 2009 with Bill 44, the Human Rights, Citizenship and Multicultural Amendment Act in which sexual orientation was included as a prohibited ground of discrimination; however, a parental opt-out clause, section 11.1, was also included.

Furthermore, Bill 206, the School Amendment Act (2009) added sexual orientation to the definition of bullying. Legislative changes in the 2012 Education Act provided greater parental rights by removing references to the Charter and Alberta human rights legislation.

Legislative changes regarding GSAs began with Motion 503⁶ in 2014 by Liberal MLA, Kent Hehr. Hehr proposed mandating school boards to create GSAs when requested by students. According to one of my interviewees, who is a MLA, this idea began with the Edmonton School Board, which had introduced a similar policy for their jurisdiction. Hehr wanted to bring this policy to the provincial level so that all schools boards would need to create a GSA upon request. While Motion 503 was voted down, according to PC MLA Sandra Jansen, it was the first time that the topic of GSAs was introduced in the Alberta legislature (Legislative Assembly of Alberta, 2017). Motion 503 was followed in November 2014 by Bill 202, the Safe and Inclusive Schools Statutes Amendment Act. Bill 202 was introduced by Liberal MLA, Laurie Blakeman in 2014. It proposed to repeal section 11.1 of the Alberta human rights legislation and move it to the School Act, add references to the Charter and Alberta human rights legislation in education legislation, and include accommodations for GSAs in the School Act. However, in response to Bill 202, the PC government introduced Bill 10. These bills were similar; therefore, according to Blakeman, legislative rules stipulated that when there are bills that are similar, the first bill to receive second reading would continue. Bill 10 received second reading first and Blakeman had to withdraw Bill 202 (Blakeman, personal interview).

Bill 10, An Act to Amend the Alberta Bill of Rights to Protect Our Children was introduced by PC MLA, Sandra Jansen. The first draft of the bill was not supportive of GSAs and did not require that they were located on school grounds. After a pause for consultations with Albertans, the second draft of Bill 10 was introduced, which contained similar propositions to Bill 202. Bill 10 repealed section 11.1 in Alberta's human rights legislation, it amended the Alberta Bill of Rights to add a parental right clause requiring that parents be notified of discussions on religion and human sexuality, and in addition to providing accommodation for GSAs, Bill 10 required school boards to create a policy 'to provide a welcoming, caring, respectful and safe learning environment that includes the establishment of a code of conduct for students that addresses bullying behaviour; (Bill 10, 2014). One important difference between the first and second draft of Bill 10 is that in the first draft, the school board would decide whether to support a student in creating a GSA; however, the second draft of Bill 10 placed the responsibility of supporting students at the local scale with the principals. Further policy changes occurred once the NDP formed government.

One of the first actions by the NDP Minister of Education, David Eggen, was to enforce Bill 10's requirement that school boards have a policy to create a supportive, caring, respectful and safe school environment. In particular, he stated in November 2015 that all school boards create a policy that supports LGBTQ+ students, including a policy for setting up a GSA if a student requested one. This move was in response to a fight among trustees on the Edmonton Catholic School Board over a policy on sexual orientation and gender identity (Bellefontaine, 2015). Additionally, in the beginning of 2016, the resource 'Guidelines for Best Practices: Creating Learning Environments that Respect Diverse Sexual Orientations, Gender Identities and

⁶ According to one of my interviewees, the difference between a Bill and a Motion is that a Motion receives a limited amount of time for debate and is more a way to bring an idea into the legislature and see the reactions to this idea.

Gender Expressions' was released. This document aimed to assist school boards with drafting their LGBTQ+ policies. In 2017, Eggen proposed Bill 24, which stipulated that if a student requested a GSA, then it needed to be provided immediately and that it could be called a GSA or whatever other name the students chose. Additionally, Bill 24 stated that parents are not to be notified if their child joins a GSA. In this way, sexually diverse children who joined a GSA will not have their sexual orientation disclosed to their parents/guardians. Bill 24 also required that school board policies and code of conducts refer to the Charter and the Alberta human rights legislation and make them publicly visible. Accredited private schools were also required to create and publicly display these policies and code of conducts. Failure to do so would result in repercussions determined by the Minister of Education (Bill 24, 2017). These changes resulted in the most progressive GSA legislation in Canada, which led to Alberta becoming leaders in this area. In the next section, I identify the mechanisms that generated these changes.

Mechanisms

As mentioned in chapter 3, a mechanism is a causal link that explains how and why x (the initial condition) causes y (the outcome) (Beach and Pedersen, 2013). Regarding policy feedback mechanisms, the question is how policy x at a certain point has an effect on policy x at later time (Béland et al., 2022). In other words, policy feedback is an endogenous process that begins and ends with a policy. In the case of Alberta, the policy of interest is the Schools Act. Possible feedback mechanisms can include power reproduction mechanisms, such as boundary control; social-political mechanisms, such as organized mobilization and mass public support/loss; and informative/interpretive mechanisms, such as elite attention and policy and the social construction of target populations. As this section will illustrate, boundary control, organized mobilization, mass public support, elite attention and policy learning were important in the Alberta case. Each mechanism below highlights the different social relations involved and how they were part of a policy feedback process that resulted in Alberta changing its education system.

Power Reproduction Mechanisms

Boundary Control

Boundary control is a mechanism that is specific to Alberta since it is understood within Alberta's context of school choice, populism, and the Constitutional rights of separate schools. Within this context, boundary control occurred through the framing and reframing of parental rights and the rights of sexually diverse students to have safe and equal access to school spaces. On the one hand, the MLAs advocating for parental rights wanted to maintain the status quo by reinforcing the School Act. On the other hand, MLAs advocating for sexually diverse students' rights wanted to undermine the School Act by changing it to include measures for creating safe school environments for sexually diverse students. In this way, the entities are the policy actors advocating for each side of the debate. The action is the framing of rights, which generated changes in the School Act. These changes then led to further reframing and amendments. Therefore, the School Act is a locality where these debates can be studied. Numerous networks of social relations come together in provincial educational policy-making debates, including the courts, Alberta's human rights commission, school boards, schools, parents, students, activists, politicians, and faith-based interest groups.

Education policy sits at the intersections of the private sphere of the family and the public sphere of the state (Collins and Coleman, 2008; Nash and Browne, 2021). Therefore, education policy is also a place in which national and/or provincial interests might conflict with parental interests and values (Collins and Coleman, 2008: 293). For example, the Charter's imposition of equality may conflict with faith-based parents' desire to teach their children according to religious values. As a result, faith-based parents try to control the boundaries of their child's education. This type of resistance to LGBTQ+ equality legislation is a form of heteroactivism.

Heteroactivism is both a form of activism and an ideology that privileges heteronormative relationships, and opposes the advancement of gender and sexually diverse rights. Heteroactivists believe that they are morally superior and that gender and sexually diverse rights threaten their families (Browne, Nash and Gorman-Murray, 2018; Nash and Browne, 2021). Instead of relying on explicit forms of homophobia/transphobia, heteroactivism can be found in framing around issues such as parental rights, anti-abortion, reproductive rights and family structure (Nash and Browne, 2021). In this way, those who want to reinforce the School Act are trying to control moral boundaries by advocating for parental rights. One important thing to note regarding parental rights and heteroactivism is that it is not only faith-based parents or school boards, but also PC and Wildrose MLAs who wanted to control what information and/or experiences that children were exposed to. The Vriend decision is a key starting point for these debates.

The Vriend decision (see chapters 3) was a landmark case because it illustrated how provincial autonomy over legislative decisions could be undermined (Cossman, 2002; Kelly, 2001). Considering Alberta's history of populism and rejection of government interference, the Vriend decision was not well received in Alberta. Moreover, it took eleven more years for the Alberta government to officially change the human rights legislation. The addition of sexual orientation to Alberta human rights code triggered an ongoing debate in education legislation about balancing the rights of sexually diverse communities and parental rights. The primary issue was concern that the government would impose curriculum and policies that conflict with faith-based parents' moral beliefs. This concern resulted in the PC and Wildrose parties, as well as faith-based parents and school boards, attempting to control these moral boundaries. However, as legislative debates evolved, so did the boundaries. To illustrate how boundary control has shaped the School Act, I will discuss the evolution of the debates surrounding parental rights and the equality rights of sexually diverse students. In other words, boundary control is a mechanism in which the right of sexually diverse students to access safe school spaces at the local scale is debated and negotiated in provincial educational policy-making.

Parental Rights and Moral Boundaries

The addition of sexual orientation in Alberta's human rights legislation was countered with the inclusion of section 11.1, the parental rights clause, in the same legislation. The *Globe and Mail* stated that the Alberta Culture Minister at the time, Lindsay Blackett, had recently told them that 'the parental rights provision was written into the bill as an olive branch to religious groups and conservative voters who might be offended by the province's move to recognize gay rights' (O'Neil, 2009). However, as Blakeman emphasized, there was already a parental rights clause in the School Act that allowed parents to remove their children from certain discussions and receive alternative curriculum instead. Placing this clause in Alberta's human rights legislation was a way of enshrining parent's rights to decide the curriculum their children are taught (Clarke, 2010:

204). In this way, section 11.1 aimed to enforce the boundaries around parental rights. For example, PC MLA, Rob Anderson stated that section 11.1 was about:

recognizing the unmatched bond of commitment that exists between a parent and child, it is about affirming that it is within this relationship that a moral code of conduct is most appropriately taught, and it is about guaranteeing for each parent that it is they and no one else who will be ultimately responsible for what values are taught to their child. It has been well said that the people we influence in a positive way constitute the real and lasting monuments of our lives. For most of us the people we are best positioned and best equipped to influence in a positive way are our children (Legislative Assembly of Alberta, 2009: 1010).

What is underlying this statement is that parents have the primary right to decide which moral values their children learn. Section 11.1 controls the boundary not only between teachers and parents, but also controls the boundaries of the courts, the human rights commission and the government by limiting their scope of interference regarding parents' decisions and moral values. In this way, boundary control in relation to Bill 44, and in particular, the inclusion of section 11.1, initiated a process of shaping moral boundaries in Alberta's education legislation under the umbrella of parents' rights, and setting the limits of where these boundaries begin.

This debate concerning moral boundaries was expanded in 2012 with Bill 3, when reference to the Canadian Charter of Rights and Freedoms and the Alberta human rights legislation was removed from the preamble of the Education Act⁷. This change was a consequence of lobbying led by the Alberta Home Education Association who were concerned that if these pieces of legislation remained in the Education Act, home schooling parents would be forced to teach their children moral values that went against their religious beliefs. In other words, they were concerned they would not be able to teach that 'homosexuality' was a sin (Banack, 2015; Kleiss, 2012). Home schooling parents, in this case, wanted to control the boundaries between public and private spheres by protecting their family values.

Moreover, PC and Wildrose MLAs contended that retaining references to the Charter and the Alberta human rights legislation in the Education Act might result in negative consequences for home schooling parents and faith-based schools. For example, PC MLA, Rob Anderson stated that he was concerned that if parents or schools did not teach according to a 'value' in line with the Human Rights Commission, then the school could lose accreditation or parents might lose their right to home school. To prevent this situation from happening, Anderson not only supported the removal of references to human rights legislation, but also advocated for making parental rights paramount so that parents could make the ultimate decision about which values their child learns (Legislative Assembly of Alberta, 2012). Bill 3 strengthened the moral boundaries around parental rights, especially the rights of parents who home school their children. However, these boundaries would begin to shift in efforts to 'balance the rights' of parents, school board autonomy and sexually diverse students.

⁷ As mentioned above, this legislation did not come into effect until 2019. The reference to the Charter and Alberta human rights legislation in the preamble is currently excluded.

Balancing Rights

Creating boundaries through rhetoric around school board autonomy and ‘balancing rights’ began with Motion 503. The PC and Wildrose arguments against Motion 503 were that school boards already had a responsibility to create safe school environments and the decision regarding GSAs is best left to the school boards (Legislative Assembly of Alberta, 2014). This debate over boundaries continued with Bill 202 as the Premier at the time, Jim Prentice, emphasized the need to balance the rights of sexually diverse students, parents and school board autonomy. This debate was prominent during the three days that the first draft of Bill 10, which was created with the intent of balancing these rights, was debated in the legislature (Legislative Assembly of Alberta, 2014).

Bill 10 focused more on controlling the boundaries around school board autonomy. For example, initially, Bill 10, which was introduced by PC MLA Sandra Jansen, stated that if a school board refused to create a GSA upon a student’s request, the student would need to go to the Court of Queen’s Bench for judicial review. This requirement resulted in heated debates within the legislature (Bellefontaine, 2014). The following day, Jansen brought forward an amendment with a ‘clear mechanism’ in place in case a school board refused a student’s request. In such a case, then students would go ‘to the Alberta Ministry of Education, and we will provide that GSA for them, hopefully within the school environment, but if that is impossible, we will make sure they get the GSA regardless’ (Legislative Assembly of Alberta, 2014). In other words, the GSA may be off of school grounds. This suggestion was considered discriminatory since other student groups, especially those related to bullying, were not excluded in this way. Brian Mason, an NDP MLA illustrated this when he stated:

That’s the problem with this amendment. It comes back to what I was saying, and that is that you either are going to overrule a school board and just pretend to let them make the decision, or you’re going to accept the school board decision and continue to allow them the right to deny GSAs. Then you’re going to take the kids somewhere else and connect them with kids that may or may not be from their school, not in the place where the bullying and the education are taking place. That’s not good enough. That’s discrimination. That’s not equality. That is treating them differently than other kids. So it’s perpetuating the discrimination that we’ve been talking about. It is, in many ways, a segregation of those kids. When they come together to talk about the bullying, they are treated differently than other kids that come together to talk or do the things that are important to them. That is the difference. The amendment doesn’t fix the problem. The amendment is nothing more than window dressing that leaves essentially the same situation as exists now and that existed with the original government bill, Bill 10, and that is to allow GBLTQ students to be discriminated against in the education system. (Legislative Assembly of Alberta, 2014).

What is significant about the arguments surrounding school board autonomy is that previously, faith-based parents, schools and other interest groups were pushing to prioritize parental decision making and prevent encroachment of these rights; however, this boundary was now being extended to school boards. This amendment did not alleviate the tension within the legislature, including among the PC caucus; therefore, the Premier, Jim Prentice, placed Bill 10 on hold in order to consult with Albertans. Once the debate on Bill 10 resumed in March 2015, the PC government had reversed their position. How this reversal happened will be discussed

below in the section on policy learning. The boundary around parental rights did not end with Bill 10, but once again changed with Bill 24, An Act to Support Gay Straight Alliances.

Parental Rights versus Children's Rights

Bill 24 was proposed in 2017 by the NDP Minister of Education at the time, David Eggen. Bill 24 stipulated that if a student requested a GSA, then it needed to be provided immediately and that it could be called a GSA or whatever other name the students chose. Additionally, Bill 24 created a boundary around children's rights by stating that parents are not to be notified if their child joins a GSA. This issue around notifying parents became a significant point of debate. Moreover, those opposed to the parental notification section contended that the Education Act required parents be notified if there were going to be discussions regarding religion and human sexuality, and they used this requirement to claim that Bill 24 was violating their right. The NDP explained that a GSA is an extracurricular activity and did not entail any curriculum or related teaching materials; therefore, the parental notification section did not apply (Legislative Assembly of Alberta, 2017). Consequently, a group of faith-based parents, private schools and school boards challenged the constitutional validity of Bill 24 (Lewson, 2020). The lawsuit was dropped after the UCP party was elected.

Throughout these debates, the boundaries of private and public spheres were often in conflict as faith-based parents/school boards resisted changes to the School Act that would possibly interfere with their parental rights. However, this type of heteroactivism had a feedback effect on the School Act. While boundary control by PC and Wildrose MLAs mostly reinforced the School Act, there were attempts by Liberal and NDP MLAs, as well as the public to undermine education legislation and prioritize children's rights over parent's rights. One consequence was the debate over school board autonomy and the question of who had the responsibility of creating a GSA when requested. Overall, the mechanism of boundary control brought together social relations from various scales to debate and negotiate moral boundaries in provincial education policy by framing and reframing parental rights and sexually diverse rights. The intent was to decide how these rights would translate into practice at the local scale and to determine if one of these rights were to be privileged over the other. While attempts to control moral boundaries occurred within legislative debates, not all parents wanted to control these boundaries. In fact, as many of my interviewees emphasized, the parents/groups opposed to LGBTQ+ policy inclusion were a concentrated group of religious conservatives. As Eric, a representative from an advocacy group noted:

there's an organization called Parents for Choice that are trying to remove the rights of educators to present information on sexual and gender diversity, so there is definitely a contingent of really strong backlash, but I think they are a vocal minority, I don't think it's a significant number of parents within the province (personal interview)

There were many Albertans, both adults and children, who were ready for change as the following quote by a former MLA suggests:

Albertans were ready for this. Everybody knew a gay kid, whether they admitted it or not, whether they knew what was weird about that kid or not, people were not willing to condemn a family member or a neighbours' kid, or the kid on the soccer team or the girl on the majorettes, they weren't ready to condemn those kids to suicide. And I knew that support was there (personal interview)

Sociopolitical Mechanisms

Organized Mobilization

Organized mobilization focuses on four advocacy groups that have either undermined or reinforced the Schools Act. Each group may be viewed as an entity bringing together different social relations that in various ways, attempts to ensure that sexually diverse students have safe and equitable access to school spaces. Through their mobilization efforts (actions), the groups that reinforce the Schools Act come together to assist with understanding and/or implementing the legislation. Those who undermine the School Act advocate for changing the legislation so that sexually diverse students have access to GSAs and other inclusive measures in their educational environments.

One way that advocacy groups opposed to a policy can undermine it is by working with the public (Stokes, 2020) to inform government about public opinion. An example of this type of feedback mechanisms is the consultations on Bill 10 held by the Rocky Mountain Civil Liberties Association when the first draft was put on hold in December 2014. According to a former representative of the RMCLA, the board of the RMCLA suspected that the PC party would not hold a consultation or if they did, they had already decided on the course of action they would take. Therefore, the RMCLA board decided to hold their own consultations (personal interview).

The purpose of the consultations was to bring together a wide range of perspectives and research regarding GSAs. These consultations included invitations to numerous stakeholders with varying views and interests in GSAs (RMCLA, 2015: 7). The RMCLA invited the bishops of the Catholic Church in Alberta four times, and the bishops declined the invitation each time. They also invited ‘members of all sides of the house and different parties. We specifically invited the public, we invited children, we invited, I mean, any party that came forward and wanted to give a submission, we accepted’ (personal interview). After the consultations were completed, the RMCLA compiled a report with recommendations for the government. Therefore, the RMCLA worked with the public to show Alberta MLAs how the public perceived the idea of GSAs in schools. As a result, the School Act, and the proposed Bill 10 were undermined to change policy to something supportive of sexually diverse students.

Advocacy groups can also work with the public by helping them understand a policy. This type of mobilization is important because policies can be interpreted differently (Campbell, 2012). In Alberta, Eric, from LGBTQ+ advocacy group stated that he went to schools in Alberta to educate students and teachers about current GSA legislation. In this way, he could ensure that students were aware that GSA legislation existed, and informed of their rights. This type of education initiative helped to inform the public about GSAs and their purpose, which also helped to reinforce the School Act. Furthermore, advocacy groups can help the public with implementing a policy in addition to understanding it.

The Calgary Center for Sexuality helped the public understand the purpose of GSAs and how the resource, ‘Guidelines for Best Practices: Creating Learning Environments that Respect Diverse Sexual Orientations, Gender Identities and Gender Expressions’ could be implemented. As mentioned previously, the purpose of these guidelines was to assist school boards with creating their LGBTQ+ policies. Consequently, there was a lot of contention around the utility of the guidelines, especially as they relate to Catholic schools. The guidelines received criticism from Alberta bishops and Catholic education leaders, who stated that the guidelines went against

Catholic teachings and inhibited parental rights (Ibrahim, 2016; Mertz, 2016). A representative from the Center for Sexuality stated that because there was such a backlash to the guidelines, they created a website called ‘Understand the Guidelines’, which included the legislation, FAQs, as well as a video from a teacher to talk about educators’ experiences. She stated that several NDP MLAs told the center that the website had helped their constituents. Additionally, two conservative school divisions reached out to the center to ask for help implementing the guidelines. According to this representative, in one school division, they trained the senior administrative staff, and in the other division, all staff in each of the schools were trained (personal interview). Considering that the School Act required school boards to create safe school policies and student code of conducts, then the actions by the Center for Sexuality self-reinforced the School Act by helping to support and implement the creation of LGBTQ+ inclusive policies.

Another way in which groups can influence policy is through the courts (Stokes, 2020). In the case of Alberta, the Center for Sexuality tried to reinforce the School Act by supporting the content of Bill 24 in court. At the same time, a group of schools, parents and parents’ groups, who were all represented by the Canadian Center for Constitutional Freedoms tried to undermine the School Act by challenging the constitutional validity of Bill 24. In particular, the group’s concerns were that the bill required principals to immediately create a GSA upon student request, the use of either GSA or QSA as a name, and the section on informing parents if their child joined a GSA (Lewsen, 2020). According to the representative from the Center for Sexuality, they were asked to be intervenors, and they were not only recognized by the judges as experts in the area, but also able to represent a wide range of stakeholders (personal interview). The case was withdrawn once the UCP party formed government.

Additionally, advocacy groups can also block the government’s agenda (Kingdon, 2014). For example, one significant interest group in Alberta is the Alberta Teachers’ Association (ATA). When the PC government introduced the first draft of Bill 10, the ATA was publicly opposed to this legislation since it did not protect sexually diverse students and teachers. However, the ATA also engaged in numerous efforts to support sexually diverse students and teachers, including with Ministry’s support. During the debate on Motion 503, the Minister of Education at the time, Jeff Johnson, stated that a representative from the ministry is part of the Alberta Teachers’ Association’s Sexual Orientation and Gender Identity Subcommittee. Furthermore, he stated that ministry staff worked with the ATA and ‘provided input into the creation of the PRISM tool kit, which assists teachers with age appropriate strategies for promoting respect for sexual and gender minorities’ (Legislative Assembly of Alberta, 2014). The ATA developed a number of resources for schools, such as a guide for teachers on GSAs in 2006 (Legislative Assembly of Alberta, 2014), and a Safe Space Initiative for schools to support sexually diverse students (Phair and Wells, 2015). The ATA’s efforts is another way of raising public awareness of the experiences of sexually diverse students in schools, but also has the potential to generate support for measures, such as GSA legislation.

Mass Attitudes

The mechanism of mass attitudes demonstrates how societal responses to policy can have a feedback effect. The entities are the public who either support or oppose measures for sexually diverse students in schools, such as GSAs, and then advocate for their position on the issue. This action generates change as MLAs must represent the public in the legislature and negotiate a

policy that will receive support. What is interesting about this mechanism in Alberta is that it shows a discrepancy between the arguments made in the legislatures against GSAs and the amount of support for GSAs from the general population. The main issue that is publicly debated is about sexually diverse students' right to have equal access to school space, particularly in the form of a school-based 'club'. By bringing complaints and comments to legislatures, the public is part of the social relations that constitutes the locality of educational policy-making.

The legislative changes mentioned above were highly visible in Alberta and traceable to government. Consequently, they influenced mass attitudes regarding the topic of sexual diversity and education policy. For example, when the first draft of Bill 10 was being debated, David Eggen and Deron Bilous, both NDP MLAs, emphasized that there were numerous Albertans who were upset and questioning why the issue of GSAs was even being debated and urged the MLAs to do 'the right thing' by passing legislation that protects LGBTQ+ students (Legislative Assembly of Alberta, 2014). Additionally, there were parents who were against Bill 202. Blakeman stated that she received numerous emails and phone calls for parents who were misinformed about GSAs. She stated 'many emails that I got from parents that were staggeringly ill informed and thought that GSAs were in schools to perform various sexual acts on children, to train them for pedophiles. It's just a staggering, shocking, appalling lack of information, and that was being perpetuated across this province' (Legislative Assembly of Alberta, 2014). In fact, Blakeman stated that she received calls and emails from concerned constituents about Bill 202 even before it had received first reading (Blakeman, personal interview). The visibility of these bills and how they were perceived helped shape public opinion not only about the legislation, but more importantly, about the underlying issue of protecting sexually diverse students in school environments.

These bills were also traceable to government, which had a feedback effect on the School Act. According to Pierson (1993), there are two tests for whether a policy is traceable. A policy is traceable if its outcomes can be connected with government policy and the policy is linked to someone who can be held accountable (622). For instance, both advocacy group and MLA interviewees suggested that the upcoming election in 2014 influenced the decision by Prentice to reverse Bill 10 to what had been in Bill 202. In this way, the traceability had a self-undermining effect by changing the School Act to support students who requested a GSA. Additionally, many of my interviewees, both MLAs and advocacy group representatives emphasized that because there had been so much public support generated for Bill 10, there was a self-reinforcing effect with Bill 24, as well as Bill 8⁸ (personal interviews). What is significant about the feedback mechanism of mass attitudes is that even though there were many contentious debates in the legislature over parental rights, mass opinions outweighed the small group of Albertans opposed to GSA legislation and the MLAs who represented them.

Framing effects by political elites and the media also influences public perceptions of policy. These effects are self-undermining when the policy is framed as flawed or a loss for the mass public and self-reinforcing when the status quo is framed as preferable (Jacobs and Weaver, 2015). GSAs were framed as an anti-bullying measure for sexually diverse students (Banack, 2015: 934), and as a way to prevent suicides and save lives. On the one hand, framing GSAs in

⁸ Bill 8 was a proposed under the United Conservative Party (UCP) in 2019, after the NDP lost the election. Bill 8, which amended the Education Act, rolled back GSA legislation to allow for more parental rights. However, as some of my interviewees explained, even though the UCP government rolled back GSA legislation, they did not push for a lot of change because of the amount of public support for GSAs (personal interviews).

this way relied on academic research and research from Egale Canada, which legitimated GSAs as an anti-bullying measure. According to Mahoney (2000), a legitimation based explanation of institutional reinforcement depends on policy actors beliefs about what is morally appropriate (524). On the other hand, framing GSAs as a way to protect against bullying had both a self-reinforcing and self-undermining effect. They were self-reinforcing when political elites framed GSAs as part of an overall anti-bullying strategy, which is under the responsibility of the school boards (Legislative Assembly of Alberta, 2014). However, framing effects were self-undermining when political elites, in particular, Liberal and NDP political elites, framed GSAs as a way to save the lives of sexually diverse students. Not only were GSAs framed by the Liberal and NDP parties as preventing suicides, but PC MLAs, such as Sandra Jansen also framed GSAs in this way (Legislative Assembly of Alberta, 2014). The framing effects are that the mass public perceive GSAs as a life saving measure for sexually diverse communities, which means that not including these in the School Act could be considered an imposed loss on sexually diverse students. Consequently, the public will more likely be convinced that policy change is needed. As Blakeman emphasized, many different people approached her and told her how essential GSAs were for saving children's lives (Blakeman, personal interview).

Information/Interpretive Mechanisms

Elite Attention

In the case of Alberta, the elite attention mechanism was one of the ways that the School Act was undermined. As mentioned in chapter three, elite attention is more likely to undermine policy when a focusing event increases issue salience and group mobilization. A focusing event brings a policy problem to the attention of government, and can be a disaster or crisis situation, centered on the personal experience of policy-makers, or the impact of powerful symbols (Kingdon, 2014: 94-96). Kent Hehr, a Liberal MLA, was the first person to bring attention to GSAs in the Alberta legislature, and Laurie Blakeman was a Liberal MLA who not only pushed for legislative change, but created a storyboard with planned actions to advocate for GSAs with the public and the media (Blakeman, personal interview). Therefore, the primary entities in this mechanism in Alberta are politicians advocating for sexually diverse students' right to GSAs. Their actions contributed to policy learning and changing mass attitudes.

As mentioned above, Hehr presented GSAs as an anti-bullying measure. First, he introduced the example of a public school, the Heritage Christian Academy. He stated that the school made 'students sign a pledge that states that they will not partake in homosexual behaviour and that if they do, they will be expelled'. He then followed this example by suggesting that mandatory GSAs would be a solution to protect sexually diverse students from homophobic bullying in schools. He legitimated GSAs by referencing research that has been conducted. Additionally, he referenced the Edmonton School Board, which had developed policies requiring school boards to create GSAs when requested by students, as well as legislation in Ontario and Manitoba requiring school boards to create GSA policies (The Legislative Assembly of Alberta, 2014). Therefore, he used the example of the Heritage Christian Academy to show the crisis in schools regarding sexually diverse students and he framed GSAs as a symbol to prevent bullying and suicide. While Motion 503 did not pass, it expanded the menu of policy alternatives, which had a self-undermining effect (Bèland et al., 2022; Jacobs and Weaver, 2015).

Laurie Blakeman, during an interview, stated that she proposed Bill 202 because she sensed that Motion 503 had generated support among the government caucus. Therefore, when Blakeman had the opportunity to introduce a private member's bill, she chose to build on the momentum from Hehr's motion. Even though the PC government responded to Bill 202 with Bill 10, Blakeman engaged in numerous strategies to advocate for GSAs in schools. She met and spoke with students and teachers interested in starting GSAs and learned their stories, she notified the media when attending a GSA meeting or upcoming conference, she encouraged the public to call their MLAs and demand they either withdraw or amend Bill 10, and she engaged in coalition building (Blakeman, personal interview). While Hehr initially brought attention to the issue of GSAs in school and introduced the conversation in the legislature, Blakeman became a champion of GSA legislation and actively worked towards ensuring that GSAs remained part of the government's policy agenda. Her efforts and attention to the issue generated public support for GSA legislation, which had an undermining effect on the School Act. While elite attention is one of the mechanisms that led to change, this change would not have happened without support from the PC government, which leads to the mechanism of policy learning.

Policy Learning

Policy learning occurred in various ways in this case study. For example, even though I have classified Kent Hehr's introduction of GSAs into the legislature as elite attention, there is also an element of learning in this process since not all MLAs were previously aware of GSAs. However, I have chosen to focus on Hehr's action as elite attention because it had a feedback effect, as discussed above, that led to a future bill, which included not only the introduction of legislation for GSAs, but legislation that was eventually adopted. Therefore, what I will focus on regarding policy learning in this case study is the public consultations by the RMCLA that were held after the first draft of Bill 10 was placed on hold. I have chosen to focus on this moment because I contend that the learning that occurred during this time generated a reversal of the PC government's position on GSA legislation. The consultations brought together numerous social relations, both those opposed to and in favor of GSAs, to address the issue of GSAs in schools. As a result of these consultations, the RMCLA wrote a report that was presented to and discussed with the Minister of Education. In other words, the consultations were a way to bring different networks of social relations to the provincial scale and have a feedback effect on the Schools Act as PC legislators learned from the public, especially students about the importance of GSAs.

According to a former representative of the RMCLA, one of the big divides was between the public and Catholic schools; however, he also stated that 'the interesting thing was that the strongest, most powerful speakers were students that came from the catholic schools wanting GSAs' (personal interview). Another interviewee, who is an MLA also stated that the strongest voices were the students. The students talked about the homophobic/transphobic violence in the schools and how in some schools, teachers do not have the resources and/or the motivation to address this violence. What is significant about these comments is that in the legislative debates, especially the ones surrounding parental rights, the interests and rights of students are not prominent. Therefore, the consultations provided students with a space to express their needs and share their experiences. Moreover, the final report by the RMCLA stated that their results showed that when there is a conflict between parental rights and the interest of the child, the latter should prevail. The report also stated that parents who do not want their child to participate in a GSA do not have the right to impose this desire on other parents or to prevent other children from participating in a GSA (RMCLA, 2015).

Regarding the issue of school board autonomy, the report stated that all schools in Alberta are creations of the legislature. What this means is that school boards and school trustees have whatever autonomy that is prescribed to them by the legislature (RMCLA, 2015: 30). This argument is similar to the one made by David Eggen during the debates on the first draft of Bill 10. He stated that, ‘if we make a law that compels gay-straight alliance clubs – you know, if there’s a choice and people want to make those happen in school boards, then we can make a law to do so. There’s nothing stopping us from doing that’ (Legislative Assembly of Alberta, 2014). Once session resumed and debates on the second draft of Bill 10 began, the issue of school board autonomy was no longer an issue.

The break between the first and second draft of Bill 10 provided MLAs with the opportunity to speak to Albertans about their perspectives on GSAs. The consultations provided a space to hear a variety of stakeholders’ views, especially students in faith-based schools. As a result, the MLAs, including the Minister of Education and the Premier, who met with Albertans and listened to them changed their beliefs about GSAs in schools, including private schools. This willingness to learn was apparent when the Minister of Education at the time, Gordon Dirks, and the Premier’s office wanted to discuss with Ernst the recommendations made by the RMCLA, and both were open to these suggestions. Moreover, when the second draft of Bill 10 was introduced in the legislature, it was evident that policy learning had occurred when the Minister of Education stated that the messages he received from the majority of Albertans were that:

Schools should allow GSAs on school property, just like every other kind of voluntary student friendship club at school is permitted to operate. Mr. Speaker, GSAs in schools do not segregate students. They are voluntary, open, and inclusive of anyone who wants to join, and they are not designed to be exclusive to LGBTQ students. As well, it should be noted that the freedom for religious, faith-based schools to engage in religious instruction is in no way limited by and does not conflict with the existence of a GSA at a school. (Legislative Assembly of Alberta, 2015).

Therefore, policy learning undermined the School Act and resulted in the PC government’s reversal on their position on GSAs in school. In fact, the second draft of Bill 10 passed the third reading almost unanimously. The extent that policy learning played in this reversal is a matter for debate. Considering there was an election looming and the populist culture of the province, introducing legislation that was supported by a large portion of Albertans may have been a strategic move. However, it is important to consider the other mechanisms that contributed to generating policy change. The passage of Bill 10 was a significant move for Alberta; however, it is not enough to conceptualize Alberta as leaders. In order to conceptualize them in this way, I will next show how the NDP forming government was a political opportunity that positioned Alberta as leaders in the context of GSA legislation.

Political Opportunity

Jacobs and Weaver (2015) state that policy change relies on the interaction of feedback effects and political opportunities (450). In the case of Alberta, the election of the NDP party in 2015 created an opportunity for further change. The NDPs rise to power happened for various reasons. On the one hand, the Premiere, Jim Prentice, had organized a floor-crossing of two Wildrose MLAs, which was followed a month later by the Wildrose leader, Danielle Smith, and eight other Wildrose MLAs who crossed the floor of the legislature to the PC party. Consequently, the remaining Wildrose MLAs, as well as their supporters felt betrayed by their leader, while the PC

caucus felt betrayed that the Official Opposition had been invited into their caucus (Bratt, 2019). On the other hand, according to Sharpe and Braid (2016), Rachel Notley's NDP campaign connected with new and younger voters whose interests had been ignored or marginalized by the PC government, as well as older Albertans who felt that the PC government was out of touch with Albertans (7). When the NDP came to power, Albertans were ready for change; therefore, creating a political opportunity. Therefore, when NDP Minister of Education, David Eggen, wanted to strengthen supports for LGBTQ+ students in the School Act, he was met with little resistance.

Since the School Act had already been undermined with Bill 10, the changes by the NDP government had self-reinforcing effects. The NDP Minister of Education, David Eggen, went to great lengths to ensure that sexually diverse students had the supports that they needed in schools. As mentioned previously, Eggen required that school boards create LGBTQ+ inclusive policies, as well as have a GSA policy in place in case a student requested a GSA. Developing these policies was enforcing the School Act's requirement of school boards to create safe school environments for all students. When Bill 24 was introduced, one further requirement was that all school boards had to make the policies publicly available. Eggen stated that he wanted the school boards to develop their own policies to create a sense of ownership and because the process of writing the policy would be educational for teachers and school board trustees (Eggen, personal interview). One important factor to note is that Eggen held the school boards accountable, including private schools, if they did not comply. There were a few school boards that had refused to develop a policy as Eggen requested; therefore, he threatened punitive actions, such as cutting funding to the school board (Ferugson, 2016). This point is significant for accredited private schools that receive public funding because they are required to follow Alberta's education legislation as a consequence of receiving public funds. Therefore, accredited private schools were also required to develop LGBTQ+ policies.

Other measures in Bill 24, such as principals needing to immediately create a GSA if a student requests one and ensuring that the name GSA or QSA could be used, and the privacy rights for students who join a GSA were measures that contributed to Bill 24 being the most comprehensive GSA legislation in the country. Additionally, not only did Eggen make legislative changes, ensure that school boards developed policies as per the Education Act, and held them accountable for developing these policies, he also wrote a letter to LGBTQ+ students on Facebook informing them that he had been working with school boards to create safe school environments. In his letter, he provided an email address for students to reach staff in the Ministry of Education if their rights were not respected (Eggen, 2016).

Conclusion

The above discussion demonstrates how provincial educational policy-making in Alberta was a locality where various networks of social relations converged. From the national scale was the Vriend decision by the Supreme Court of Canada, which read in sexual orientation to Alberta human rights legislation. While this decision meant that the Alberta human rights commission could accept cases of discrimination based on sexual orientation, the human rights legislation was not amended until 2009. This amendment integrated education, sexual diversity and human rights through section 11.1 and initiated a debate over parental rights/school choice and the rights of sexually diverse students. In other words, section 11.1 was the consequence of social relations from the national scale converging with provincial (Ministry of Education, legislature), regional

(school boards) and local (schools, parents, students) scales. Additionally, the mechanism of organized mobilization also brought together numerous social relations from various scales to provincial debates about how to create safe school spaces for sexually diverse students. For example, the consultations by the RMCLA collected data from numerous networks of social relations about their position on GSAs, and concluded with a recommendations for the Minister of Education. In the next chapter, I will discuss the case study of Newfoundland/Labrador.

As the preceding discussion illustrated, Alberta gradually changed its education system from laggards to leaders. It was the only province that included a discriminatory parental opt-out clause in its human rights legislation, yet ended up with the most comprehensive GSA legislation in the country. The policy feedback mechanisms identified in this chapter illustrate the various policy actors, power dynamics and institutions involved in the process of change and the scales from which they emerged. Moreover, by theorizing provincial educational policy-making as a locality, the feedback mechanisms demonstrated how these social relations from each scale interacted to negotiate how to balance the rights of sexually diverse students and faith-based parents in an effort to create safe school spaces.

Chapter 5: Case Study 2: Newfoundland/Labrador

Introduction

I am equally proud to report that on Friday past, Egale Canada made a presentation to an international conference in Switzerland, where participants spoke about best practices taking place around the world to create safer and more inclusive schools. Mr. Speaker, our work around the development and distribution of MyGSA resource was highlighted at that conference as an example of providing leadership, and creating partnerships, which will help address this issue. (House of Assembly, May 7, 2013)

The above quote suggests that Newfoundland/Labrador became leaders in the context of sexual diversity and education policy. This chapter will provide a detailed account of the mechanisms that led to this status by focusing on changes to Newfoundland/Labrador's Safe and Caring School Policy and the policy feedback effects. In this way, I demonstrate that the Safe and Caring Schools Policy is a locality in which various networks of social relations converge and debate how to create safe and inclusive school environments at the local (school) scale. First, I will give an overview of how the education system in Newfoundland/Labrador shifted from a multi-denominational to a non-denominational system. This change was significant for understanding how Newfoundland/Labrador became more inclusive of sexually diverse communities because it opened opportunities for them to advocate for their rights. Furthermore, this change resulted in the amalgamation of Anglophone school boards into one district, the Newfoundland/Labrador English School District (NLESD), which had a fundamental role in informing provincial policy, implementing the Safe and Caring Schools Policy, and partnering with the Department of Education and Egale to create access to safe school spaces for sexually diverse students. The next section will give an overview of the political context in Alberta, which will be followed by a section on the development of the Safe and Caring Schools Policy and how this has been part of Newfoundland/Labrador's collaborative approach. I will then discuss the feedback mechanism in the final section.

Shift to a Non-Denominational Education System

Newfoundland's first Education Act of 1836 divided public education funding among the Christian churches, thereby embedding a multi-denominational education system in Newfoundland and Labrador (Galway, 2014: 180). When Newfoundland/Labrador joined Confederation in 1949, Term 17, the Term of Union, allowed Newfoundland to maintain its denominational education system. In this way, Term 17 replaced section 93 (see chapter 1) of the British North America Act (Ferrin, 2001: 415). Under the denominational system, students were bussed to the nearest schools of their faith, and teachers were chosen by the church and according to religious affiliation (Ferrin, 2001; Mulchay, 2007).

In the latter half of the twentieth century, there were concerns from the Newfoundland and Labrador Teachers' Association, politicians and the public that the denominational system was affecting the quality of education that students received (Wright et al., 2007). For example,

when the Royal Commission on education was appointed in the early 1990s to evaluate the state of education in the province, submissions from the public highlighted key concerns. These included the expense of the system, the duplication of services, the violation of non-church members' rights, the fact that children were sent to different communities, and students were taught intolerance of different religious beliefs (Ferrin, 2001: 418-419). In response to concerns about education under a denominational system, the Commission made over 200 recommendations to change Newfoundland/Labrador's education system (Ferrin, 2001; Mulchay, 2007).

The Newfoundland government responded to the Commission's recommendations by suggesting the creation of interdenominational schools where all students would learn together regardless of religion, as well as a provision for uni-denominational schools. Negotiations with religious representatives about how this new system would work were unsuccessful. As a result, the government had a referendum in 1995 to seek approval from the people to amend Term 17; however, this decision met with resistance from the church. Therefore, when Brian Tobin became premier in 1996, he asked the Prime Minister of Canada to amend Term 17, and the resolution was passed by the House of Commons in December 1996 (Ferrin, 2001; Grimes, 1996). In 1997, there was another referendum where 73 percent of voters agreed to a nondenominational education system. This referendum resulted in the amendment of Term 17 in 1998.

The new Term 17 stipulated that school boards and not the church would hire teachers. Additionally, teachers would be hired based on teaching qualifications and not religious affiliation. School board members were to be elected, which gave parents and the community a voice in local education, and students were not to be separated based on religion. Another change that occurred was the reduction of school boards from 27 to 11 and the closing of numerous schools (Ferrin, 2001; Galway, 2014). The amendment of Term 17 was the first pivotal step towards changing Newfoundland/Labrador's education system not only into a nondenominational system, but a centralized one where the provincial government increased its power and decision-making capacity.

In 2004, further educational restructuring occurred as the number of school districts was again reduced from eleven to five, with the remaining boards responsible for a larger area (Tomblin et al., 2006; Wright et al., 2014). This reduction was a way of 'balancing the books' for government, especially since fewer students were enrolling in school (Galway, 2012). As part of the provincial 2013 budget, the four remaining English school districts were amalgamated into one, the Newfoundland and Labrador English School District (NLESD) (CBS News, 2013). Currently, there are a francophone school district and the NLESD. The NLESD, which represents all English speaking students in the province, consists of four regional offices, each staffed with an Assistant Director of Education (NLESD, 2018). The NLESD is of importance for this research because it was an essential partner in changing Newfoundland/Labrador's education policy in the context of sexual diversity.

Political Context

In Newfoundland/Labrador, two important aspects of the political context are regionalism and the reliance on natural resources. In the 1970s, a Newfoundland nationalism emerged, which favored a more local approach to policy, resulting in a distrust of external interference with policy and politics, and the development of regionalism (Flanagan and Marland, 2016; Marland, 2010;

Tomblin and Braun-Jackson, 2006). Regionalism is when a government's policies are adapted to geographical specificities, often with economic incentives (Marland, 2010; Tomblin and Braun-Jackson, 2006).

Regionalism was prioritized as an approach to policy in the 1990s as a way of addressing numerous problems. For instance, regionalization in Newfoundland/Labrador was viewed as a way to deliver services in geographically isolated areas, increase citizen participation in policy decision-making, and reduce costs of services (Tomblin and Braun-Jackson, 2006: 5-8). According to Tomblin and Braun-Jackson (2006), it is not uncommon for centralization to happen during the regionalization process. The example above of reducing the number of school districts is an example of this type of centralization as the number of school boards were reduced, schools closed and regional boards created as a cost-saving measure. While citizen participation was a reason given for regionalization, this did not always happen in practice, such as when then Premier, Danny Williams, amalgamated the school districts in 2004 without citizen feedback. Williams justified this reduction, as well as other cost-cutting measures to services during a televised address informing Newfoundlanders that there was a financial crisis and that everyone needed to make sacrifices (Marland, 2014).

While Williams made many financial cuts to services, during his time as Premier, the economy began to shift because of increased revenue from the province's natural resources. Moreover, for the first time, Newfoundland/Labrador would no longer receive equalization payments from the federal government (Dyck, 2016). The equalization program, which began in 1957, is administered and funded by the federal government and was enshrined in the 1982 Canadian Constitution Act (Brown, 2020; Lecours and Béland, 2009). The goal of this program is to counter regional inequality while respecting provincial autonomy (Lecours and Béland, 2009) by ensuring that all provinces have the same fiscal capacity to implement their programs. Provincial fiscal capacity is measured against a national standard and if it is below the national standard, then the province receives equalization payments to increase capacity. (Brown, 2020: 258-360). One of the main reasons that Newfoundland/Labrador stopped needing equalization payments was because of their oil industry, which impacted the government's capacity to finance their policies and programs (Marland, 2014: 20), including in education.

Both regionalism and oil revenues influenced education in Newfoundland/Labrador. On the one hand, while amalgamating the number of school districts has been part of Newfoundland/Labrador's regionalization, the effect has been a centralized education system with the NLESD and Department of Education working in partnership. In other words, the concentration of power is in the hands of a few instead of a localized approach to education. However, this structure of educational governance enabled the enforcement of a government-led, province-wide initiative to change the education system so that sexually diverse students could safely access school spaces. Additionally, the revenue from oil in Newfoundland/Labrador allowed for the Department of Education to finance initiatives to address LGBTQ+ issues in schools. For example, one of my interviewees, David, who is a former bureaucrat in the Department of Education stated:

It was a great time to be in education, at the Department of Education at the time because it was our, where we financially peaked, we had some real good resources. The oil was at 140 dollars/barrel at the time, so I actually had a budget in the department that, you know, was really a nice budget that enabled us to do things. (personal interview)

In addition to the training workshops and MyGSA resource, which are discussed below, the department also did a full analysis of the curriculum to determine where LGBTQ+ material/issues could be integrated. However, according to David, once the price of oil began to fall, the department had fewer resources, which meant that the curriculum was never implemented⁹. While there are feedback mechanisms discussed below, it is also important to acknowledge the role of the political economy in changing Newfoundland/Labrador's education system, as well as the significance that regionalism has on Newfoundland/Labrador's political context. The next section will discuss the evolution of Newfoundland/Labrador's Safe and Caring School Initiative. Understanding the province's history of regionalism is important for the history of the policy.

Collaborative Approach

The Newfoundland and Labrador's Safe and Caring School Policy was developed as part of the provincial Violence Prevention Initiative (VPI). In 1991, the Newfoundland and Labrador government recognized the need for a long-term plan to address violence in the province; therefore, it established an executive level committee to develop a Provincial Strategy Against Violence. This committee was chaired by the Women's Policy Office, and included representatives from the Departments of Health, Social Services, Education, as well as Justice and Cabinet Secretariat (VPI, 2002: 11). The PSAV, which was in place from 1995-2000 was an interdepartmental, government-community initiative. The strategy's goals were to prevent violence and improve service delivery to survivors (VPI, 2000). These strategies were continued under the Violence Prevention Initiative, which began in 2000 and was chaired by the Minister Responsible for the Status of Women (Newfoundland and Labrador, 2000). Under the Violence Prevention Initiative, the Department of Education implemented a Safe and Caring Schools Initiative in 2001 to address violence and bullying in schools (Department of Education, 2003a).

Both of the above initiatives used a collaborative approach. The Provincial Strategy Against Violence was created in 1995, the same time period in which the provincial Social Strategic Plan was introduced. The aim of the Social Strategic Plan (SSP) was to use the voluntary community-based sector (VCBS) to strengthen social policy planning and programs. One of the main reasons for this plan was to improve rural communities with the hope that residents would want to remain there. The SSP was a way to develop social policy in partnership with the government, regional committees and the VCBS. In other words, it was an effort towards regionalization. However, this plan ended in 2004 after Danny Williams became Premier. The Williams' government developed a new program, the Rural Secretariat, which had greater focus on rural and regional development (Close et al., 2007). The SSP, which was the first of its kind in Canada, was a way to develop inclusive social policy (Violence Prevention Initiative, 2006: 4).

While the SSP did not survive, it did influence the VPI goal of community collaboration. For example, in 2003, the VPI created a document, *Collaborating with Community: Introduction, Rationale and Guide for Government*, which provided guidance to government about collaborating with the community. The document emphasized that community consultations were no longer sufficient for important issues; therefore, government needed to move towards a more

⁹ While my interviewee stated that the curriculum was not implemented because of fewer resources, it is also important to note is that the decision not to implement the curriculum was made under a new government. Therefore, it is possible that the choice not to implement the curriculum was a decision based on government priorities.

collaborative approach. The document stated that collaboration is a process, entails different perspectives, and it should be solution focused and not advisory. Community collaboration was meant to build on the SSP's aim for government to be more inclusive in its development of policies (VPI, 2003: i). Moreover, in 2005, the Community Advisory Committee was established. This committee consisted of representatives from community organizations and worked with the government and Regional Coordinating Committees (VPI, 2006: 5).

In 2012, when the provincial government evaluated the first VPI action plan (2006-2012), it found that there was greater collaboration between the government and community organizations in addressing violence (VPI, 2015: 7). The 2015-2019 action plan listed twenty-one different government departments and agencies as partners and stakeholders. Among this list was the Department of Education and Early Childhood Development. Additionally, there were various non-governmental stakeholders (VPI, 2015). While the SSP ended in 2004, its policy legacy continued with the Newfoundland and Labrador's Violence Prevention Initiative. The Department of Education's Safe and Caring School Policy was developed as part of the VPI, and also entails a collaborative approach.

Newfoundland and Labrador's Safe and Caring Schools Policy

In 2002, the Department of Education sponsored a Provincial Forum on School Bullying. This forum included various participants, such as community partners, students, parents, and school board representatives. Following the forum, a Safe and Caring Schools Action Plan was developed, which implanted the Safe and Caring Schools Initiative. The Safe and Caring Schools Initiative began as part of the Provincial Violence Prevention Initiative with the objective of addressing violence in schools and creating safe and caring school environments (Department of Education, 2003). The Safe and Caring Schools Initiative continues to be the foundation of the Department of Education's current 2013 Safe and Caring Schools Policy. This initiative is a collaborative effort among stakeholders to create safe, caring and inclusive schools. The Safe and Caring Schools policy outlines the guiding principles of the initiative as well as stakeholder responsibilities (see Department of Education, 2013: 1-14).

In 2012, after public concerns regarding bullying among youth, the Department of Education decided to initiate an external review of the 2006 Safe and Caring Schools Policy. The recommendations from the resulting report, as well as public consultations have informed the revision of the Safe and Caring Schools Policy, 2013 (Goss Gilroy Inc., 2012: 13). Numerous consultations were conducted during the review of the 2006 Safe and Caring Schools Policy. a private consulting firm, Goss Gilroy Inc., conducted the external review, consulted with students, teachers, administrators, district personnel, as well as government and community partners. The Department of Education carried out further consultations and met with the Federation of School Councils, the Newfoundland and Labrador Teachers' Association, law enforcement agencies, the Newfoundland and Labrador Human Rights Commission, students, as well as Egale Canada. At the time, Egale was a partner in creating safe and inclusive environments for sexually diverse students in Newfoundland/Labrador, which is elaborated on below. According to Clyde Jackman, who was Minister of Education, one of the messages received during the consultations was that more direction was needed from the Minister of Education to the primary stakeholders - Department of Education, the NLESD, schools, students and parents. (Jackman, December 9, 2013). In the revised 2013 Safe and Caring Schools Policy, the responsibility of the above stakeholders were highlighted. Other recommendations for the Department of Education include

creating guidelines to operationalize the policy, strengthening interdepartmental collaboration in implementing the policy, developing a database so that schools can access curriculum reviews, and working with Egale to develop GSAs (Goss Gilroy Inc., 2012: 98).

The Safe and Caring Schools policy, which was enshrined in the Schools Act in 2013 (NLESD, 2019), aims to guide stakeholders in creating safe, caring and inclusive school environments. As mentioned above, the responsibilities of each stakeholder were outlined in the revised policy. In particular, the Department of Education had numerous responsibilities, including establishing and maintaining safe and caring schools, collaborating with government departments and community agencies, as well as showing leadership by supporting and promoting safe school environments (Department of Education, 2013: 3-6). The school district was responsible for implementing the policy (NLESD, 2019), as well as showing leadership in creating safe learning environments, and promoting learning among teachers and staff. Schools, students and parents were responsible in various ways for creating and maintaining safe, caring and inclusive school environments. The policy also emphasized that a safe, caring and inclusive environment entails inter-agency collaboration and community partnerships (Department of Education, 2013). Furthermore, the policy states that schools will have a code of conduct, implement violence prevention initiatives, follow the Bullying Intervention Protocol, and adopt inclusive educational practices. One of these inclusive practices suggests that schools with junior and senior high school students encourage GSAs, as well as the resource, MyGSA (Department of Education, 2013: 10-13).

The Newfoundland/Labrador government made various efforts to create safe, caring and inclusive schools for sexually diverse students. In 2012, the government allocated 90 000 dollars for the resource, MyGSA, which was created to assist teachers, administrators and school counselors with creating a GSA. This resource was distributed to all middle and high schools in the province (Goss Gilroy Inc., 2012: 60). This resource was funded by the Department of Education, as well as the provincial Violence Prevention Initiative and developed by Egale Canada and the Women's Policy Office. Newfoundland/Labrador was the first province to make this resource available to every junior and senior high school in the province (Education Executive Council, 2012). In 2012, an additional 100 000 dollars in provincial funding was allocated to train principals, vice principals, guidance counsellors (Newfoundland and Labrador House of Assembly, 2013), as well as teachers in the province on LGBTQ+ related issues. Development of training materials was a collaboration between the NLESD, the Department of Education and Egale Canada (Pike, 2016). In addition to these partners, David, a former bureaucrat in the Department of Education, stated that the Indigenous Labrador Office was consulted to ensure that Labrador's needs were considered regarding GSAs (personal interview). Furthermore, the Safe and Caring Schools Policy was amended in 2016 by adding guidelines for creating safe, caring and inclusive schools for LGBTQ+ students. These guidelines emphasize a Collaborative Decision Making Process that involves LGBTQ+ youth in school policy decisions (DEECD, 2016a: 7).

Newfoundland/Labrador's Safe and Caring School Policy and its evolution illustrate the ways that different networks of social relations converge in provincial policy-making, especially considering that the creation and changes to the policy have been a collaborative effort. The Department of Education and the Minister of Education have attempted in numerous ways to resolve inequities regarding the right to safely access school spaces, especially regarding violence. Of importance for this study are efforts made regarding sexually diverse students. At

the local scale (the schools), equality rights for sexually diverse students did not translate into safe and equitable access to school spaces; therefore, changes in provincial policy were made to rectify this situation. Not only were changes to the Safe and Caring Schools Policy made, but assistance in developing the training and resources needed to implement these changes came from the national scale through Egale. Furthermore, Egale partnered with the NLESD, the Department of Education, and the Women's Policy Office. In other words, three different scales worked together through provincial policy to support sexually diverse students' right to access school spaces. The experiences and feedback received from the different scales then had a feedback effect on the Safe and Caring Schools Policy. The following section will provide a more detailed account of the policy feedback mechanisms that generated change.

Policy Feedback Mechanisms

The feedback mechanisms in the case of Newfoundland/Labrador were organized mobilization, policy learning, social construction of target populations, and elite attention. As this section will illustrate, these interrelating mechanisms operate simultaneously at different scales, which according to Bunge (2004), is common in complex systems, such as education systems (193). In this section, I will break down the policy feedback process by giving a more detailed account of each mechanism and their relation to each other.

Sociopolitical Mechanisms

Organized Mobilization

I contend that organized mobilization in Newfoundland/Labrador was a case-specific mechanism that generated policy change. In particular, it generated change that contributed to Newfoundland/Labrador moving from a laggard to leader in the context of education and sexual diversity. While this mechanism can be found in every province, the people and organizations advocating for change differ. In this way, organized mobilization can also be generalizable; however, it was the efforts of one activist, Susan Rose, who was also a board member of Egale Canada, which was a significant factor for Newfoundland/Labrador becoming leaders. Rose was one of the actors that engaged in numerous actions, which generated change. These actions included advocating with educational officials and the Minister of Education, educating on LGBTQ+ issues in schools, accompanying Egale members with the provincial wide training program, as well as facilitating connections with the Department of Education and the executive director of Egale Canada. Additionally, Egale, was also an entity in this mechanism and their actions consisted of working with the Department of Education and the NLESD to develop and implement a training program for school administrators and teachers in the province.

Susan Rose had been a teacher in Newfoundland/Labrador before and after Term 17 had been amended and the provincial human rights legislation was changed to include sexual orientation. According to Rose, homophobia was rampant in the Newfoundland/Labrador education system and when she came out after the provincial human rights legislation was amended, she experienced a great deal of discrimination and homophobia. As a result, Rose retired from teaching in 2006 and in 2007 she joined Egale Canada (Rose, personal interview), which is a national organization that formed in 1986 and focuses on the rights of gender and sexually diverse communities (Smith, 2005: 85). According to Rose, two main areas that Egale began to focus on post marriage equality were education and research. After joining Egale, Rose states that as a board member, she began meeting with groups of parents and students who were

not in school, as well as the Education Minister, to discuss her own experiences in the Newfoundland/Labrador education system (Rose, personal interview).

Moreover, Egale received some funding to conduct the first national survey on homophobia and transphobia in Canadian high schools in collaboration with the University of Winnipeg and the University of Manitoba (Taylor and Peter, 2011). According to Rose, the Newfoundland/Labrador Minister of Education at the time, Joan Burke, was approached and asked if the survey could be distributed to every school district in the province. According to two of my interviewees, David and Rose, Burke was very positive about the survey and agreed to its distribution (personal interviews). As a result, Newfoundland/Labrador was the only province to distribute the survey to all school districts (Hasselriis, 2009).

The results of Egale's survey showed that both LGBTQ+ and those perceived as LGBTQ+ experienced great amounts of homophobic/transphobic verbal, physical and sexual harassment. Almost two-thirds of LGBTQ+ students stated that they felt unsafe at school. Furthermore, respondents who had GSAs in their schools or anti-homophobia related policies reported less experiences of harassment and safety concerns (Taylor et al., 2011). Once the results of the survey were released, Rose spoke with the Minister of Education about signing a contract with Egale to provide workshops to school personnel on LGBTQ+ issues. After the minister agreed, Rose connected the executive director of Egale, Helen Kennedy, with the Minister of Education and the Deputy Minister to negotiate the contract. According to Rose, this was Egale's first contract of this nature (Rose, personal interview). According to David, a former bureaucrat from the Department of Education, the goal of the workshops was to create a provincial training plan that began with top administrators and school board members (personal interview).

Regarding policy feedback, Susan Rose took action after her homophobic experiences as a lesbian teacher in the Newfoundland/Labrador education system to improve the school system. In terms of the mechanism of organized mobilization, Rose was the entity (actor) who responded to the homophobia in Newfoundland/Labrador schools, the lack of protection for sexually diverse students in schools, as well as the lack of education regarding their experiences. In this way, Rose recognized the discrepancy between equality rights at the federal (Charter) and provincial scale (provincial human rights) and the enactment of these rights at the local scale. Not only did she acknowledge this inequity, but she also took action by requesting that Egale's survey be distributed throughout the province as a way to gather evidence that school spaces were unsafe for sexually diverse students. The feedback effect of the survey was that the Minister(s) of Education and the Department of Education became aware of the widespread homophobia in the education system. As a result, the distribution of the survey and the results led to a contract between Egale and the Department of Education. These actions generated change in Newfoundland/Labrador's education system, including training workshops and the development of the MyGSA resource. The training workshops and MyGSA resource were part of the government's three year plan to 'build awareness around LGBT issues' (Newfoundland/Labrador House of Assembly, 2013).

Therefore, mobilization resulted in numerous relations negotiating how the Department of Education could support sexually diverse students. Consequently, a government three-year plan was initiated, which provided funding for Egale to educate regarding LGBTQ+ issues in Newfoundland/Labrador. The feedback effect was that there would be changes to the Safe and

Caring Schools Policy, including further funding and training throughout the province. Moreover, the feedback effect extended beyond Newfoundland/Labrador. According to Rose, once Egale negotiated a contract with the Minister of Education, Ontario followed their lead. Helen Kennedy then began networking and working with education ministers in other provinces to change their education systems (Rose, personal interview).

Information/Interpretive Mechanisms

Policy Learning

Policy learning occurred in different ways in Newfoundland/Labrador. Three instances of policy learning include the results of Egale's survey, the review of the 2006 Safe and Caring Schools Policy and the addition of the LGBTQ+ guidelines to the 2013 Safe and Caring Schools Policy. In other words, with the mechanism of policy learning, there were numerous entities and actions involved. Entities with the Egale survey include the Minister of Education, bureaucrats in the Department of Education, as well as elected officials. The actions included signing a contract with Egale, as well as partnering with them in the development and funding of training workshops and MyGSA resources. Regarding the review of the 2006 Safe and Caring Schools Policy, the entity included on the one hand, the organization that conducted the review, Goss Gilroy Inc. This organization not only did a jurisdictional review, but also held consultations within the province. The information gathered from these activities informed the recommendations from the review. On the other hand, the Minister and Department of Education were also entities who learned from the review what was needed to strengthen the policy and made changes as a result. As for the revision of the Safe and Caring Schools Policy to include LGBTQ+ guidelines, the entity was the Department of Education, which drew from similar policies in other jurisdictions to create the LGBTQ+ guidelines. In each of the examples above, there were a variety of relations from different scales coming together at the provincial scale to plan and implement ways of creating safe and inclusive school spaces for sexually diverse students.

The results of Egale's survey were a fundamental part of policy learning in Newfoundland/Labrador. For example, in 2012, Gerry Rogers, a NDP Member of the House of Assembly (MHA), stated in the legislature that:

Many of our gay or perceived-gay students swim in a sea of insults as they wend their way through the hallways from class to class, or in the gym, or in the washrooms in our schools. The bullying ranges from verbal insults like faggot and 'lesbo', to physical attacks, the destruction of their property, and cyber-bullying. There is no escape. They also found that two-thirds of LGBTQ students felt unsafe at school – two-thirds, Mr. Speaker. That is over 60 per cent of our children who are lesbian, gay, bisexual, or transgendered feel unsafe at school, a place where they go five days a week for most of the year. Twenty per cent of these students and almost 10 per cent of straight students have been physically harassed or assaulted because of their perceived sexual orientation or gender identity. This spills over, Mr. Speaker, even to our children who are not in the gay category. Thirty-seven per cent of our youth with lesbian or gay parents have been verbally harassed about the sexual orientation of their parents. Our own son, Mr. Speaker, was tortured at school because he had two mothers. He was threatened. He was afraid to go out. He was afraid to walk to school. He was afraid to walk home from school. We had to go to the police. This was twenty years ago, Mr. Speaker, and no one at

that time – no one – helped us. Perhaps it was because at that time it was perceived that it was our own fault for being who we are (Newfoundland and Labrador House of Assembly, 2012).

Moreover, Rose states that once the results were released, the Deputy Ministers in the Department of Education were shocked not only by the statistics, but also the realization that parts of Newfoundland had students talking about teachers holding prayer meetings. Consequently, the Ministers of Education and Deputy Ministers were open to addressing the situation and welcomed the training program from Egale (Rose, personal interview). As mentioned in the previous section, one of the learning effects from receiving the results was the creation of a three year plan to address issues related to sexual diversity in school environments.

Policy learning also occurred as a result of an external review of the 2006 Safe and Caring Schools Policy. The Minister of Education at the time, Clyde Jackman, decided to review the Safe and Caring Schools Policy because of increased reports of bullying. The review was conducted by Goss Gilroy Inc., which consisted of jurisdictional scans at the Ministry of Education, as well as district scales. In particular, the Vancouver School Board, the Ontario Ministry of Education, and the Alberta Ministry of Education were chosen for review (Goss Gilroy Inc., 2012: 6). Additionally, consultations were held within the province regarding a definition of bullying, as well as student conduct. These consultations were with the ‘Newfoundland and Labrador Federation of School Councils, Newfoundland and Labrador Teachers’ Association, Newfoundland and Labrador School Boards Association, Memorial University of Newfoundland, school district personnel (district office staff, administrators/teachers, students, parent representatives from school councils), Royal Canadian Mounted Police, Royal Newfoundland Constabulary, and other government and community stakeholders’ (Department of Education, 2013: 12). As a result, the Schools Act was amended, as was the 2012 Safe and Caring Schools Policy.

In 2016, after Dwight Ball became Premier, further amendments were made to the Safe and Caring Schools Policy, resulting in the LGBTQ+ guidelines to assist schools with creating safe, caring and inclusive school environments for sexually diverse students. The development of the guidelines consisted of policy learning from Alberta Education and the Nova Scotia Department of Education and Early Childhood Development. Both of these departments had similar publications on creating safe and inclusive school spaces for sexually diverse students. Furthermore, these two provinces developed their respective documents with assistance from the Toronto District School Board and the Canadian Teachers’ Federation. The development of the Newfoundland/Labrador LGBTQ+ guidelines also consisted of feedback from Egale, the NLESD, as well as individuals working within the healthcare field (NLEECD, 2016b: 2). In this way, there were numerous networks from various scales informing the development of the guidelines.

In each of the examples of policy learning, there was not only a policy feedback effect, but also policy diffusion. As mentioned in Chapter 3, policy diffusion occurs when a jurisdiction adopts a policy that was successful in another jurisdiction (Maggetti and Gilardi, 2016). In the case of the review of the Safe and Caring Schools Policy, policy learning happened when Goss Gilroy Inc. reviewed safe and caring school initiatives in Vancouver, Alberta and Ontario. Regarding the LGBTQ+ guidelines, policy learning entailed reviewing and adopting strategies included in similar LGBTQ+ guidance documents in Alberta and Nova Scotia. In the example of

Egale's survey, learning occurred when the results of the survey highlighted the conditions and experiences of sexually diverse students both within Newfoundland/Labrador, and in the other provinces. In this way, the survey showed that there were deeply rooted structural homophobia/transphobia in educational institutions across the country. While learning in these cases were examples of policy diffusion, there was also a policy feedback effect, resulting in amendments to the Safe and Caring Schools Policy, the development of a government initiated training program about LGBTQ+ issues, the inclusion of the MyGSA resource as part of the Safe and Caring Schools Policy, and the creation of guidelines to create safe and inclusive school spaces for LGBTQ+ youth.

In the case of policy learning, there were multiple ways in which different social relations converged at the provincial level, interacted, negotiated, and institutionalized the construction of sexually diverse students as victims of violence. This example illustrated the various scales in which equality rights were enacted and/or refused and the ways that the different scales could work together to address the issue, such as with the review of the 2006 Safe and Caring Schools Policy and the LGBTQ+ guidelines.

Social Construction of Target Populations

The entities in this mechanism consists of individuals and/or groups whose action entails framing sexually diverse communities in a particular way. Furthermore, sexually diverse communities can also be considered entities when the social constructions have a feedback effect by influencing their political involvement. In the case of Newfoundland/Labrador, early social constructions by school staff and officials, as well as elected officials were often negative; consequently, the Safe and Caring Schools Policy, which did not include measures to protect this population was self-reinforced. However, after the results of Egale's survey were released, how sexually diverse communities were constructed changed; thereby, resulting in the undermining of the Safe and Caring Schools Policy.

After the amendments to Term 17 and the human rights legislation, homophobia continued to be widespread in the Newfoundland/Labrador education system. According to Rose, colleagues were openly homophobic and discriminatory, and when she asked for help and protection, she received the following responses:

When I couldn't get any satisfaction from the administration, well they basically told me to ignore the guy, my school board told me the same thing. My union rep told me he was dealing with homophobia at the union, so he didn't know how to help me. How wonderful, I thought, I'll meet with the Minister of Education, surely someone will help me and he took great delight in looking at me and saying if you make an issue of this, I'll fire you and that really changed my life in a way. I knew there was no going back for me, and I mean no going back. Everything was on the line at that point (Susan Rose, personal interview).

These responses illustrate that sexually diverse communities were constructed as underserving of safety and protection, which undermined not only Newfoundland/Labrador's human rights legislation, but also the Canadian Charter. Moreover, these responses reinforced the 2006 Safe and Caring Schools Policy, which did not explicitly address homophobic bullying.

After the results of Egale's survey, construction of sexually diverse communities began to change. For example, they were constructed in the House of Assembly as deserving protection from homophobic violence. For instance, NDP leader, Lorraine Michael stated:

This survey that was done in schools in the Province with the co-operation of the Department of Education showed that we have a lot of harassment going on in the schools in Newfoundland and Labrador. We have students who are being hurt, who are being damaged. They experience all kinds of homophobic attitudes played out, the behaviour of other students. Ms Rose, in the report that she did, had stories of people harassed and injured, or having to change schools to get away from homophobia. Ms Rose gave the officials the message, and she gave it loudly and clearly to the department, that this is a human rights issue. Kids are entitled to a safe learning environment. When she got the permission to do the survey, she was able to also do education as she was doing that survey, and the results of that survey in our schools will be out soon. We have the results of the survey on the national level, and according to Ms Rose the results are not out yet for the Province but unfortunately the provincial statistics are probably going to look like the national ones, which are not very good (Newfoundland and Labrador House of Assembly, 2009).

Additionally, Michaels argued that it was the Department of Education's responsibility to address homophobia, and in this way, change society (Newfoundland and Labrador House of Assembly, December 1, 2009). The education department attempted to fulfill this role through its training program and the distribution of the MyGSA resources.

The Department of Education's training program also had a policy feedback effect on societal views about sexually diverse communities. For example, Rose stated that sometimes after a workshop, a principal would approach her and apologize for how she had been treated and then state that they were questioning their religious beliefs (Rose, personal interview). David, a former bureaucrat in the Department of Education also stated that once people began to understand LGBTQ+ issues and experiences, they brought that knowledge home with them, especially when they knew someone who was sexually diverse. He said this knowledge changed their lives and their attitudes, which is why it was important that education about sexually diverse communities happened. Additionally, this David stated that there was very little resistance by the public to the training program and distribution of the GSA resource. He stated:

I had one phone call because when we started this program, I said to Clyde [Jackman, then Minister of Education] at the beginning, 'Well, I might as well tie myself to the phone because if we are going to be spending 90 000 dollars to building a GSA specific to Newfoundland, you know, Joe Public is going to be calling to say this, blah, blah, blah, I don't agree with this, that money.' Well, I had one phone call from a citizen who was questioning whether or not it was money well spent and my reaction was if it saves one life, it is money well spent, would you not agree, and he was not belligerent, he was just an individual citizen questioning a few things. We were delighted, the response we got from the community was incredible (personal interview).

In this way, sexually diverse communities were reframed as deserving of safety, of protection, and of inclusion in policy.

However, it is also important to note that the training program and MyGSA resource did not end homophobic bullying in Newfoundland/Labrador. Rose continues to advocate for students and their families who have been victimized. For example, she discussed a more recent case in which a student was surrounded by other students and called homophobic slurs and encouraged to commit suicide. The vice-principal did not help the student and instead, blamed him for how the other students treated him. Additionally, Rose stated that there are still students who are required to change schools when they experience homophobic bullying instead of addressing the issue at that particular school. Changing schools can be very difficult since it sometimes means that the family needs to move to a new community (Rose, personal interview). Therefore, even if the Department of Education constructs sexually diverse students as deserving of protection, this construction does not always translate into practice. In other words, despite the acknowledgement at the provincial scale that sexually diverse students have the right to access school spaces, this right is not always enacted at the local scale. Consequently, Rose continues at the local scale to try and change the situation and continues to advocate the Minister of Education and the Department of Education to take action.

The social construction of target populations' mechanism had a feedback effect on the Safe and Caring Schools Policy. Legislators, bureaucrats in the Department of Education and school boards initially constructed sexually diverse communities as underserving of protection from homophobia-based violence. However, the action of these actors reframing sexually diverse communities as a risk for harm and deserving of protection undermined the Safe and Caring Schools Policy and resulted in numerous measures, as have been outlined throughout this chapter, to create safe school environments for sexually diverse students and to educate about their experiences. As the provincial education campaign was implemented, societal views also changed, resulting in greater support for the government's initiatives. While these positive constructions were important for generating policy change, the attention of the Minister of Education and senior level bureaucrats in the Department of Education also had a significant role.

Elite Attention

Rose states that the results of the survey by Egale changed the face of education in Newfoundland/Labrador; therefore, the survey and its results can be viewed as a focusing event that brought attention to the experiences of sexually diverse communities in education. More specifically, the attention of Clyde Jackman, who was Minister of Education from 2011-2014, and senior level bureaucrats in the Department of Education (Executive Council, 2014). Therefore, the Jackman and senior level bureaucrats were the entities and the action was their focused attention on creating safe and inclusive school environments for sexually diverse students. This attention generated policy change.

All of my interviewees stated that Clyde Jackman was fundamental to creating a more inclusive school environment for sexually diverse students in Newfoundland and Labrador. According to Rose, she had previously met with numerous Ministers of Education; however, Jackman was the only one who truly understood the impact of homophobia on sexually diverse students. She stated that Jackman:

was a man who dropped into our workshops and it was very clear when he spoke that if you're a religious teacher or educator and you feel you can't park your religious beliefs by the door when you enter the building, that you're employed by the Department of Education, and your only responsibility is to provide a safe and inclusive environment for

your students, that includes your 2SLGBTQ students. If you can't do that you need to find another profession. That was very powerful messaging, that was not happening anywhere else in Canada (Rose, personal interview).

Similar to Alberta, the enforcement of policy by the Minister of Education was a way of holding school administrators accountable for their actions (or lack of actions). David emphasized that Jackman was adamant that the Department of Education was going to do the training and that all students, including LGBTQ+ students, had a right to be free from bullying and/or harassment. Moreover, in the House of Assembly, Jackman made his position clear when he stated 'I want no child to suffer, to feel humiliated or to feel alienated because of their sexual orientation in the schools. We know it is there. It has always been there, and the simple fact of it, let us deal with it (Newfoundland and Labrador House of Assembly, 2012).

The elite attention mechanism can also be applied to the Department of Education. For example, the department has been a partner with the NLESD, as well as Egale in developing the training workshops not only to the principals, vice principals and school counsellors, but to all of the teachers in the province. In fact, when Egale initially began training, there were people from the education department as well as NLESD that also attended the training to ensure there were no issues or resistance from the schools (personal interview). Additionally, all my interviewees named different senior level bureaucrats in the department who were determined to improve the school environments for sexually diverse students (personal interviews).

Regarding the elite attention mechanism, Clyde Jackman and certain senior level bureaucrats in the Department of Education acted to change the learning environments in Newfoundland and Labrador. Jackman was responsible for initiating and enforcing the training program, and for initiating a review of the 2006 Safe and Caring Schools Policy. As mentioned previously, both of these actions generated policy change. The Department of Education's actions entailed partnering with Egale and the NLESD to implement the Safe and Caring Schools Policy by developing the training program. In this way, the education department's actions led to further changes, such as allocating additional funds to train all teachers in the province, which contributed to changing societal views regarding sexually diverse communities. As highlighted previously, these efforts consisted of various networks of relations working at the provincial scale to implement the rights of sexually diverse students to safely access school spaces at the local scale.

Conclusion

The preceding discussion illustrates how provincial educational policy-making is a locality where negotiations and decisions regarding the right of sexually diverse students to have equal and safe access to school spaces occurs. To begin, there were different networks of social relations engaged in debates and discussions about transitioning to a non-denominational educational system. At the same time, there were also networks advocating for and against the inclusion of sexual orientation in Newfoundland/Labrador's human rights legislation. While these were not directly about sexually diverse students, the changes that resulted opened opportunities for discussions on sexual diversity to occur within the education system. From the national scale, there were policy actors advocating for the enforcement of rights guaranteed in the Charter, such as Egale. Furthermore, policy learning was a way for other provinces' policies to diffuse horizontally across jurisdictional boundaries. Within the province, there were the Minister of Education, the Department of Education, the NLESD, as well as individual schools, parents, and

students. Additionally, there was the external review of the 2006 Safe and Caring Schools Policy, which brought together another network of social relations working to improve the policy.

This chapter and chapter 4 provided a more detailed account of the policy feedback mechanisms that generated change and the ways that different networks of social relations can change this process, and the ways that education policy changes to reflect these relations. The next chapter will provide a broader discussion about how these policy feedback processes resulted in gradual institutional change in each province. In particular, I will focus on how the mechanism of gradual change in Alberta was policy drift, and in Newfoundland/Labrador, policy layering.

Chapter 6: Gradual Institutional Change: Policy Drift and Layering

Van de Heijjden (2010), in reviewing Mahoney and Thelen's (2010) book, *Explaining Institutional Change*, emphasizes that theories of institutional change need to focus more on how, why and when change happens. One of the objectives of this dissertation has been to explain how and why Alberta and Newfoundland/Labrador changed their education systems in the context of sexual diversity. In particular, I have identified policy feedback mechanisms that help explain how change happened. In this chapter, I will discuss how policy feedback effects led to gradual institutional change in each province. Moreover, I argue that in Alberta, gradual change happened primarily as a result of policy drift and in Newfoundland/Labrador, through policy layering.

Alberta and Policy Drift

In this chapter, I contend that policy drift in Alberta happened when the Schools Act was not updated to protect sexually diverse students from homophobic violence and discrimination despite the inclusion of sexual orientation in Alberta's human rights legislation and increased awareness regarding homophobic violence in schools. Moreover, I argue that the legislative changes and debates, such as Bill 10, that happened in Alberta were attempts to respond to policy drift. As mentioned in chapter 4, Bill 10 required school boards to institute a GSA when requested by students. In this way, schools and school boards could not refuse a request for a GSA.

As discussed in chapter 2, policy drift is when the social or economic context of a policy changes; however, the policy itself is not formally revised to adapt to the new circumstances. (Béland et al., 2016; Galvin and Hacker, 2020; Hacker, 2004; Hacker et al., 2015; Rocco and Thurston, 2014). Béland, Rocco and Wadden (2016) state that policy drift is difficult to study because it is an invisible mechanism in which there are slow moving social and economic changes coupled with policy inaction. However, even though mechanisms are invisible, they do have visible implications. For example, Rocco and Thurston (2014) highlight two types of evidence that indicate policy drift is present. One type of evidence is when institutional actors acknowledge changing external conditions; however, the institution does not adapt to these changes (47). For example, when Kent Hehr, a Liberal MLA spoke in the legislature regarding the second draft of Bill 10, this exemplified how views around sexual diversity and education had changed many years prior, including in the Catholic school system:

In 2006 the Alberta Teachers' Association passed a motion at their spring conference saying that gay-straight alliances should be in all public schools. I will note that this was supported 100 per cent by all teachers at that meeting, whether they were from the Catholic system or the public system. So this idea has been around for a while, and it took us to get to this stage here, where opposition members and other members of the public and organizations out there in the community had been pressing the government on this issue and where these ideas of GSAs were discussed broadly in the community and the LGBTQ community wanted to have them instituted. You saw that at the discussions around Camp fyrefly communities, ISMSS¹⁰ at the University of Alberta, all over the place. This was an idea whose time had come. So I'd like us to all recognize the fact that this was democracy in action (Legislative Assembly of Alberta, 2015)

¹⁰ Institute for Sexual Minority Studies and Services

As mentioned in chapter 4, Motion 503 was voted down and Bill 202 was replaced with the contentious Bill 10; therefore, despite changes in society regarding sexual diversity in education, especially with respect to GSAs, changes to the School Act were blocked. Furthermore, many of my interviewees also emphasized that Albertans were ready for change and viewed GSAs as saving children's lives, which leads to the second type of evidence.

Another type of evidence of policy drift is when there are new patterns of social or economic behaviour that would not have happened if there had been an alternative policy in place (Rocco and Thurston, 2014: 47). As mentioned in chapter 5, the results of the Egale survey showed that both LGBTQ+ students and those that were perceived as LGBTQ+ did not feel safe at school. While this was not a new pattern of social behaviour, governments could no longer deny that LGBTQ+ students did not have equal access to safe school spaces. Furthermore, the feedback from Albertans after Bill 10 was implemented suggested that if GSAs had been in place earlier, school spaces could have been safer for sexually diverse students. For example, Blakeman stated that people told her that children's lives had been saved because of the GSAs. Additionally, she stated that older generations were happy that LGBTQ+ children would have the support in schools that they did not have (Blakeman, personal interview).

As mentioned in chapter 4, the Alberta government announced a Safe and Caring Schools Initiative in 1996 and it was not until 2014 when the Schools Act was amended with Bill 10. Despite this delay, the government was aware that homophobia existed in schools, especially considering that the Calgary Center for Sexuality initiated an anti-homophobia program as part of its sexuality education program in the 1990s. Furthermore, there were initiatives by the Alberta Teachers' Association and ISMSS, as well as other organizations to make schools safer for sexually diverse students because the Schools Act did not address this issue. Not only did the School Act fail to make schools safe for sexually diverse students, but as mentioned in chapter 4, in 2012, references to the Charter and Alberta human rights legislation were removed. Therefore, the above examples suggest that policy drift had happened.

Policy Drift and Feedback

Galvin and Hacker (2020) state that there are four core features relevant to policy feedback and drift. These features include: the policy remains in place; the policy's effects change; these effects create new problems; and this process is gradual and hidden (219). I will apply these features to the case of Alberta to illustrate how legislative changes in education help exemplify the process of drift. I argue that policy drift began with the Vriend decision in 1998 when the Supreme Court of Canada read in sexual orientation to Alberta's human rights legislation. Prior to this court decision, there were no provincial laws in Alberta protecting sexually diverse students from discrimination or violence in education. Despite this decision, the Schools Act was not amended to reflect this change. Therefore, once this court decision was made, the Schools Act failed to protect these students because it did not protect sexually diverse students against discrimination.

The second feature is that the effects of the policy change. This feature can be seen with the issue of GSAs and other measures to create safe school environments for sexually diverse students. On the one hand, Egale's survey revealed that schools with GSAs had fewer instances of homophobia/transphobia harassment (Taylor et al., 2011). On the other hand, the Schools Act stated that school boards need to have an anti-bullying policy; however, what was included in the policy was at the discretion of the school boards. Consequently, whether a GSA was initiated was

decided by individual school boards, resulting in inequities regarding safe access to school spaces. For example, Kent Hehr, a Liberal MLA who introduced Motion 503, which proposed mandating school boards to create GSAs when requested by students, highlighted this discrepancy when he stated:

Well, given that these acts apply, I was shocked to learn that Heritage Christian Academy, a fully funded public school, makes students sign a pledge that states that they will not partake in homosexual behaviour and that if they do, they will be expelled. My question is: why does the minister continue to allow schools to castigate students on the basis of their sexual orientation, which is clearly against the Canadian Charter of Rights and Freedoms and the Alberta Human Rights Act (Legislative Assembly of Alberta, 2014)?

The Minister of Education at the time stated that he was not aware of this incident, to which Hehr responded:

Well, Mr. Speaker, it's simply unbelievable that the minister is not aware of this. Given that this example of the Heritage Christian Academy shows that there are schools and school boards in this province that without your government's leadership will continue to not support kids who are lesbian, gay, bisexual, transgendered, and queer in our school system, accordingly will you bring in legislation that makes mandatory gay-straight alliances in schools where kids want them (Legislative Assembly of Alberta, 2014)?

Another one of my interviewees, Eric, from an advocacy group also emphasized this discrepancy. He stated that in the schools/school boards that did not have LGBTQ+ inclusive policies, there was a lot of unresolved homophobic and/or transphobic bullying. Moreover, Eric stated that 'there were some schools that were, oh, this isn't a problem in here, but then people in my position of work would say, well actually no, we're in touch with a lot of students who say this is a very serious issue and it is very much a problem' (personal interview). Therefore, leaving the anti-bullying policies at the discretion of the school boards meant that the effect of the policy was not universal and despite the legal obligation to protect all students, this right was not always extended to sexually diverse students. In this way, the School Act had drifted as it was not serving its intended purpose of protecting all students from violence and bullying.

The mechanisms that had a feedback effect as a result of the discrepancy in school board policies were organized mobilization, as well as elite attention and learning. These mechanisms brought together different networks of social relations together in provincial educational policy-making to debate how to address the disparity regarding sexually diverse students' access to safe school spaces. As a result, there was increased mobilization around the issue of ensuring safe spaces for all students, including sexually diverse students in faith-based schools. First, organized mobilization was a mechanism that countered policy drift as advocacy groups worked to counter the lack of policy protection for LGBTQ+ students. As a result, the Rocky Mountain Civil Liberties Association, which held consultations for Bill 10, brought together students, parents, teachers, LGBTQ+ activists, academics, as well as many others to share their position on GSAs. These consultations informed the RMCLA's final report, which made numerous recommendations that were adopted in Bill 10. As mentioned in chapter 4, other organizations also mobilized and in each case, brought together different sets of social relations to advocate for provincial educational policy change.

Second, elite attention and policy learning were also a mechanisms that had a feedback effect and worked towards countering policy drift. Not only did Kent Hehr and Laurie Blakeman, both Liberal MLAs propose legislation (Motion 503 and Bill 202) to mandate school boards to create GSAs when requested by students, some NDP MLAs also attempted to educate the legislature that GSAs were not a threat to faith-based schools. These mechanisms were opportunities to highlight what other jurisdictions, both at the provincial scale, such as Ontario and Manitoba, as well as the school board scale, such as the Edmonton Public School Board, had done to address homophobic and transphobic bullying. For example, in reference to Ontario and Manitoba, NDP MLA Deron Bilous, stated:

Mr. Speaker. I was thrilled to learn that there are other jurisdictions in this great country of ours that have GSAs which exist in both public and Catholic schools. That may come as a shock to some. But, hey, believe me, it's true. Ontario and Manitoba both have legislation that mandates that all students in all public and separate Catholic school boards are allowed to form GSAs if they want to. For some reason for the folks in Ontario this doesn't contravene or contradict their religious beliefs. You know, there's a part of me that feels as a – I want to mention in this Assembly that I myself am a Catholic, Mr. Speaker. I see no conflict between students starting GSAs in Catholic schools or rural schools or any school. This isn't even about singling out one or another. This is about all schools. If students have the desire to form a GSA, they should be allowed (Legislative Assembly of Alberta, 2014).

Referring to the school board scale, Rachel Notley, leader of the NDP stated:

The EPSB allows for every child within the Edmonton public school board who wants to start a GSA to start a GSA, and that's why the vast majority of GSAs in Alberta resides in the Edmonton public school board. Interestingly, the Edmonton public school board uses its public dollars to also fund several destination faith-based schools. That exists within the EPSB, yet we've not heard a peep about how that somehow has undermined the rights of those who participate and attend those schools because, in my view, it doesn't. A voluntary support group adjacent to a faith-based education: they're not mutually exclusive, Madam Speaker. Frankly, I think that it's the people who suggest that they are who are the ones that are sowing divisiveness. Those are the ones that are sowing unnecessary debate. Those are the ones who are sowing a fight where none exists. I think that if it can happen in EPSB, frankly, it should be able to happen anywhere else (Legislative Assembly of Alberta).

Despite the learning that happened in the legislature, the PC government did not change their position until after the consultations for Bill 10.

The third feature emphasized by Galvin and Hacker (2020) was that new problems emerge as a result of the changed effect. The biggest problem that emerged was the debate about equality rights of sexually diverse students versus religious rights. As I mentioned above, this feedback effect can be viewed through the mechanism of boundary control and primarily began after the addition of section 11.1 to Alberta's human rights legislation. This debate concentrated on religious rights and maintaining the status quo because GSAs were perceived as going against religious beliefs and values. Wildrose MLA Bruce McAllister exemplified this during the debate on Motion 503:

It would be highly inappropriate for us assembled in this Legislature to use our power to force schools, particularly faith based schools, to sanction any organization that might teach or promote concepts that contradict their sincerely held religious beliefs. Doing so may be well meaning, but in effect it works to protect the rights of one group by disrespecting the closely held beliefs of another group. We must support school boards and teachers in their faith-based schools to find the best ways to combat bullying of LGBT students or any other students in a way that is also respectful of their beliefs and faiths (Legislative Assembly of Alberta, April 7, 2014)

From this, the problem that emerged was how to create safe and inclusive school spaces for sexually diverse students, while respecting religious beliefs. In this way, the debates around balancing rights brought together representatives of different networks of social relations with conflicting interests to negotiate and decide at the provincial scale how to respect the rights of all parties.

The fourth feature is that drift happens over a long period of time and is hidden. Drift became evident only after the consultations for Bill 10 when the PC's government position on GSAs changed after meeting and speaking with Albertans. The consultations demonstrated that there was a discrepancy between the arguments to protect faith-based schools prior to the consultation and the views of society regarding this issue. In general, the public viewed GSAs as a positive measure to support sexually diverse students, while it was a small group of faith-based parents and organizations who were concerned about the effects that GSA legislation would have on children. Numerous mechanisms helped to illustrate this discrepancy.

First, change in mass attitudes demonstrated that the arguments in the legislatures against GSAs did not align with public perception on the topic. Additionally, policy learning, especially regarding the consultations showed MLAs that GSAs were generally welcome by Albertans, especially by sexually diverse students who wanted GSAs. This knowledge was enough to change the position of the PC government to reflect public opinion. For example, after the consultations Gordon Dirks, who was Minister of Education at the time stated:

Most importantly, in my travels around the province I talked with numerous students who are directly affected by gay-straight alliances. If you could have joined me in these conversations, Mr. Speaker, you would have heard students talking about the taunting, mocking, and bullying they have suffered because of their sexual orientation. You would hear them speak of parents who don't understand them, of online bullying, and of suicidal thoughts. They told me, sometimes in tears, how alone and helpless they have felt when caring friends and sympathetic teachers are not around them. But when I asked them, "Tell me about your GSAs," their faces (524) brightened, and with animated voices they would tell me about their GSA, how it helped them feel safe at school and how they now felt valued, respected, and welcomed. Mr. Speaker, even if you talked to no one else on this matter except students, you would quickly come to the conclusion that GSAs are all about providing groups of gay and straight students with safe, caring, respectful, welcoming, and inclusive spaces at our schools (Legislative Assembly of Alberta, 2015).

Finally, the mechanism of elite attention also played a role, especially the way that Liberal MLA, Laurie Blakeman championed GSAs. As discussed in chapter 4, Blakeman proposed Bill 202, which proposed mandating school boards to create a GSA when requested by students and to repeal section 11.1 in the Alberta human rights legislation. Bill 202 was removed after Bill 10

received its second reading. After Bill 10 was introduced, Blakeman organized her time to educate the public about the importance of GSAs and also encouraged people to contact their MLAs and demand support of Bill 10. These efforts had a feedback effect during the consultations as more Albertans were open to the idea of GSAs and MLAs were willing to listen to the public. Moreover, as with the previous examples, the mechanism of elite attention brought together different relations to advocate policy change. The convergence of these relations was partially the result of Blakeman's efforts to encourage the public to come together and request policy change.

The learning that happened at the consultations then had a feedback effect in the legislature as the second draft of Bill 10 was passed almost unanimously. Therefore, the consultations were a significant point for making visible the fact that drift had occurred, and the amendment to the Schools Act with Bill 10 was the formal revision of the drifting Schools Act. Further changes to the School Act were made through layering with Bill 24.

Bill 24 and the Layering of the School Act

Once the School Act was amended with Bill 10, it was more in line with Alberta's human rights legislation and the needs of sexually diverse students. However, despite this amendment, sexually diverse students continued to experience barriers to the creation of GSAs. Some of these barriers were the refusal and/or delay in implementing GSAs after requested, as well as not respecting students' privacy when joining a GSA. Rachel Notley, who was Premier at the time, emphasized the continued difficulties despite the amendments from Bill 10. In speaking to Bill 24, which had the objective of strengthening GSA legislation, Notley stated:

When our government was elected, we quickly became aware that schools and in some cases school boards, but mostly schools, were still able, under the regime of Bill 10, to actively discourage kids from requesting GSAs. The old approach or the approach that was put forward under Bill 10 simply wasn't working. It asked those kids to be the heroes, to push against a culture and a set of rules and daily directions that still existed in schools throughout this province, to push against them in order to make that courageous choice to request that a GSA be formed. The fact of the matter is that the rights of young people were being actively frustrated, with little recourse. Madam Speaker, what we are doing here is that in many cases we are talking about the most vulnerable children inside that school. We are not talking about Norma Rae. To expect those kids to be Norma Rae, to fight against all those subtle and not so subtle pressures against them, discouraging them to stand up and speak about who they are, is to expect too much from the most vulnerable. Quite frankly, when the rights of the few are denied, it is, in fact, the obligation of government to step in to protect those rights. That is what this bill is about (Legislative Assembly of Alberta, 2017)

In this way, amendments to the School Act through Bill 24 were an example of policy layering where the purpose was not to change or displace the previous policy, but to complement it with stronger provisions.

Complementary layering addresses secondary concerns that arise through the layering process (Daugbjerg and Swinbank, 2016: 269). In Alberta, the secondary concerns included privacy issues, as well as ongoing resistance in some schools to implementing a GSA. Therefore, Bill 24 complemented Bill 10 by stating that parents were not to be notified if their child joins a

GSA, that GSAs were to be initiated immediately when requested, and that all school board policies and code of conduct must refer to the Charter and Alberta human rights legislation and be publicly visible. These changes were the result of a political opportunity when the NDP formed government. As noted above, Notley, the Premier at the time, strongly supported GSAs and the rights of LGBTQ+ to access safe school spaces. Furthermore, the Minister of Education at the time, David Eggen, was also a strong ally for LGBTQ+ students and access to safe school environments.

Newfoundland/Labrador and Policy Layering

In Newfoundland/Labrador, gradual change happened through policy layering of the Safe and Caring Schools Policy. As mentioned in chapter 5, this policy was developed as part of the Safe and Caring Schools Initiative, which began as part of the Newfoundland/Labrador Violence Prevention Program. The objective of the initiative and resulting policy has been reducing violence in schools and creating safe learning environments. As societal needs have changed, the Safe and Caring Schools Policy has continued to evolve through a policy feedback process and policy layering.

Layering is when policy is changed through new amendments and revisions, which might result in new rules, goals and instruments (Hacker, 2004; Mahoney and Thelen, 2010; Schickler, 2001). According to Rocco and Thurston (2014), there are three observable implications of layering. They argue that layering may entail a shift in membership to the new institution, a shift in elite support and the initial institutions may become outdated (48). Therefore, policy layering may be evident when there is conflict between the old and new institutions (Rocco and Thurston, 2014), especially when there are contradictory goals between the layers. This type of tension is known as “tense layering” (Wellstead et al., 2016). The policy actors involved in layering can be numerous and context dependent. These may include groups who have been marginalized by the original institution, stakeholders (Daugbjerg and Swinbank, 2016), as well as target populations (Choi and Seon, 2021). Therefore, identifying layering requires not necessarily identifying the relevant policy actors, but looking for the tensions between those who support the old institution and those whose alignment has shifted to the new, layered institution.

Regarding members shifting to the new policy, which in this case was primarily school administrators, teachers, and parents, there was support while the PC party was in power; however, once the Liberal party formed the government, the issue of LGBTQ+ inclusion became more contentious. In this way, conflict between policy layers was more apparent after a change in government. Regarding a shift in elite support, this was a feedback effect of the elite attention mechanism. Elite support continued under Ball’s government; however, the issue of creating safe school spaces for sexually diverse students did not receive the same level of elite attention. Regarding the old policy becoming obsolete, I contend that this was not the case, rather, layering strengthened the previous Safe and Caring Schools Policy to improve access to safe spaces for LGBTQ+ students. The changes included initiatives such as training school administrators and counsellors about LGBTQ+ related issues, the creation and distribution of the resource MyGSA, as well as the addition of LGBTQ+ guidelines to help schools create LGBTQ inclusive policies. Finally, similar to the shift in members to the new policy, conflict between the old and new policies became more apparent when the PC party was no longer in power and the Liberals formed government.

Both interviewees and Hansard debates suggest that there was support among teachers, school administrators, parents, and the public for the revisions of the Safe and Caring Schools Policy, and that there was little resistance to the LGBTQ+ related training program or MyGSA initiatives. The social construction of target populations' mechanism had a feedback effect in shifting support to the new policies. For instance, the Minister and Department of Education, as well as the NLESD constructed sexually diverse communities as victims of violence in need of access to safe and inclusive school spaces. This construction was enforced by the fact that representatives from the department, the NLESD, as well as the Minister of Education attended Egale's workshops to address questions/concerns from participants, and to ensure that Egale did not encounter any problems. Additionally, education through the training program and MyGSA resources had a feedback effect by changing how some teachers and school administrators viewed sexually diverse communities. For example, as mentioned in chapter 5, Rose stated that people had approached her after the workshop, apologized for how she had been treated and told her they needed to rethink their religious beliefs.

However, it is also important to note that there was little room for contention among teachers and school administrators while PC MHA, Clyde Jackman was Minister of Education. As mentioned in chapter 5, Jackman sent a message when he attended some of the workshops that participants needed to ensure sexually diverse students have safe school environments regardless of teachers/administrators religious beliefs. According to Rose, he told them if they were unable to 'park your religious beliefs by the door', they should find a different job (Rose interview). Therefore, to analyse whether teachers and school administrators supported the new LGBTQ+ initiatives, it is important to also explore their actions once Jackman was no longer the education minister.

After the Liberal party formed government in 2015, the NLESD continued their training with teachers regarding LGBTQ+ issues; however, some of my interviewees suggested that the measures instituted by the previous government in which Jackman was Minister of Education, were not implemented in the same way. One interviewee from an advocacy group stated that there were teachers who refused to discuss LGBTQ+ issues with their students (personal interview). Additionally, Susan Rose, a former teacher turned activist, stated that Jackman distributed *And Tango Makes Three*, a book about two penguins who create a non-traditional family, to every kindergarten class in the province and asked the teachers to begin reading it (Rose, personal interview). However, according to Rose, once Ball became Premier, things changed. For example, Rose stated:

We've got kindergarten teachers teaching, And Tango Makes Three, and they are doing it all by themselves. The other 50 or 75 Kindergarten teachers are too afraid to do it. We have schools where teachers are becoming brave enough to talk about what it means to be gay, lesbian because they can't introduce transgender, and parents are shutting them down so they are packing their bags and leaving that school and community because they can't survive there (Rose, personal interview).

While there were teachers who were afraid of teaching material that was distributed by the former Minister of Education, the fact that they continued to read this book to children illustrates that there were educators implementing the LGBTQ+ initiatives in the Safe and Caring Schools Policy. Moreover, the fact that there were teachers who were beginning to speak about being

LGBTQ+ even though they were silenced by the schools, suggests that these teachers supported the revisions to the Safe and Schools Policy regarding LGBTQ+ communities.

The mechanism of elite attention also had important feedback effects in revising the Safe and Caring Schools Policy. For example, after the results of Egale's survey were released, the conditions of sexually diverse students in the province began to receive attention by elites. One of the feedback effects was a contract with Egale to train principals, vice-principals and counselors in the province about LGBTQ+ issues, as well as the development and distribution of the resource, MyGSA. In this way, policy layering resulted in the inclusion of new groups and instruments into Newfoundland/Labrador's education system (Daugbjerg and Swinbank, 2016; Thelen, 2004). Policy layering happened again in 2013 when the Safe and Caring Schools Policy was revised, which advocated for a continuing working relationship with Egale to make schools safe and inclusive for sexually diverse students. Furthermore, the definition of bullying was changed in the Schools Act to include sexual orientation.

Overall, a feedback effect of elite attention was that numerous social relations from different scales converged in provincial educational policy-making spaces to discuss how to create safe school spaces. These relations originated from the national scale (Egale), the provincial scale, (Department of Education, NLESD, VPI), regional scale (NLESD regional offices) as well as local scales (schools, teachers, parents, students). Those at the local scale were primarily involved in the policy-making process through consultations and advocacy work. Moreover, as mentioned in chapter 5, Egale, the Department of Education, the NLESD and the VPI worked as partners to design and implement LGBTQ+ initiatives within the province.

Elite support for the revised policy was also evident when the Liberals formed government in 2015 and Dale Kirby was the Minister of Education. Under Kirby, the Department of Education and Early Childhood Development continued to provide financial support for training teachers and curriculum development, in partnership with Egale and NLESD (DEECD, 2016). Additionally, as discussed in chapter 5, the Safe and Caring Schools Policy was revised with the addition of LGBTQ+ guidelines to increase awareness of LGBTQ+ inclusive practices. However, Rose emphasized that LGBTQ+ issues was not one of the nine focus areas in the action plan, *The Way Forward*, which is a plan to guide education in Newfoundland/Labrador for ten years.

One of the possible reasons why LGBTQ+ communities were excluded from *The Way Forward* was because there had already been revisions to address LGBTQ+ safety in schools and the initiatives from these revisions were ongoing. According to Daugbjerg and Swinbank (2016), once a policy is revised, then there may be decreased attention from policy-makers, the media and the public (269). Additionally, the department developed LGBTQ+ guidelines to assist teachers and school administrators with creating safe school environments. However, as Rose emphasized numerous times, policy on paper is meaningless if it does not result in improving conditions (Rose, personal interview).

Another possible reason that LGBTQ+ initiatives did not receive the same amount of elite attention was a lack of resources. According to Rocco and Thurston (2014), policy layering requires resources to implement policy changes (46). Gerry Rogers, a NDP MHA highlighted the importance of adequate resources when she stated:

So, I would be very, very interested in seeing again the resources that will be made available, because just to make the legislation is not enough. It is not enough. We have to have the resources so that teachers can do work, so that there are media campaigns – because that was an integral part of training, the very effective training that has happened in schools. We also know that training a group of people really helps, but then those people change, and people come and go, and so there needs to be ongoing training. Again, the training that has been done has been so excellent; the feedback about it has been great. (Newfoundland and Labrador House of Assembly, 2013)

Furthermore, David, a former bureaucrat from the department highlighted the resources needed to implement the training:

Oh yes, and when I look at, I can't even remember how much that cost. Egale came down several times and then of course, they travelled across the province and then if you look at the number of our personnel tied up with that training and the dollar value on that, it was a significant investment, financial investment to train, you know, people across the province (personal interview)

However, the decrease in oil prices negatively impacted Newfoundland/Labrador's political economy. For example, David stated, 'then of course, the bottom fell out of the oil industry, budgets got cut, so, there hasn't been a whole lot of money to put towards any initiative in the last few years' (personal interview). Therefore, when Dwight Ball was Premier, he was faced with a province experiencing economic hardship, which affected policy decisions (Roberts and Tobin, 2016). These financial difficulties meant that Ball may have been unable to initiate new LGBTQ+ related measures.

Support by senior level bureaucrats is also important regarding implementation. Two of my interviewees, one an activist and one a MHA, emphasized that what comes out of the department depends significantly on who is in charge within. If there is a director of education who is not supportive of initiatives for sexually diverse communities, then this lack of support affects policy implementation (personal interviews). Overall, there was elite support for adding LGBTQ+ initiatives to the Safe and Caring Schools Policy, and this support continued with a change in government. Consequently, the policy was self-reinforced when it was layered with further funding for training and curriculum development from the Department of Education and Early Childhood Development, and when it was layered again with the LGBTQ+ guidelines.

As for the old policy becoming obsolete, this was not evident. Instead, the old policy was strengthened through layering, particularly after the results of Egale's 2009 survey were released. The survey revealed that LGBTQ+ students did not feel safe in their school environments, which suggests that the 2006 Safe and Caring Schools Policy was inefficient in addressing the needs of LGBTQ+ students. In this way, through the survey, the mechanism of learning brought a greater awareness to policy-makers that changes were needed. Therefore, since the Safe and Caring Schools Policy was developed as part of the provincial Violence Prevention Initiative, then the purpose of layering was to strengthen violence prevention initiatives with complementary layering, not to displace the policy (Daugbjerg and Swinbank, 2016). Moreover, learning, which also occurred as a result of the external review of the Safe and Caring Schools Policy by Goss Gilroy Inc, showed the gaps in the previous policy and suggested ways to improve it. As discussed in chapter 5, the mechanism of learning resulted in bringing attention to and changing policy elites' ideas about safety and violence in schools.

As mentioned above, layering can bring in new groups and tools, and it can change the direction of the policy (Thelen, 2004). Therefore, in the case of strengthening the 2006 Safe and Caring Schools Policy, layering incorporated Egale as a partner in making schools safe for LGBTQ+ students, and changed the trajectory of creating safe, caring and inclusive school environments for these students. In addition to the LGBTQ+ initiatives mentioned, amendments, which had a strong focus on anti-bullying measures, were made to the Schools Act, 1997. In this way, the Safe and Caring Schools Policy was enshrined in the Schools Act, 1997. Legislative changes were viewed as a way of ensuring protection of students and enforcing the Safe and Caring Schools Policy. For example, Jackman stated:

Mr. Speaker, amendments to the Schools Act, one of the things we certainly will do, it will line up the Schools Act, 1997. It will line it up and be revised in conjunction with the Safe and Caring Schools Policy. It will strengthen and support the policy to place emphasis on ensuring that schools have codes of conduct. It allows the minister to issue directives related to bullying, protocols, and data collection. Why do we need the legislation? We want strong enforcement of the policies (Newfoundland and Labrador House of Assembly, 2013).

Therefore, by introducing new groups, tools and enshrining the Safe and Caring Schools Policy in legislation, the 2006 policy was not made obsolete, it was improved.

The final evidence that may suggest that layering has happened is when there is conflict between the old and new policies. Rocco and Thurston (2014) state that layering results from institutions interacting with each other (44). In this way, there may be conflicts between old and new institutions, especially when the legacy of previous decisions does not align with policy changes (Wellstead et al., 2016: 1875). One way in which this is evident in Newfoundland/Labrador is conflict between the remnants of a denominational education system (legislation before 1997) in which sexually diverse teachers could be fired without recourse, and revision of the 1997 Schools Act that focused on protecting sexually diverse students. While publicly there was a lot of support for these changes, homophobia/transphobia continued to exist within the education system before, during and after the amendments were made. For example, one of my interviewees, who was a former politician stated:

And religion played a role, more so, although we didn't have a, we no longer had a denominational school system but in some parts of the province, fundamentalist Christians were totally against us. So, there was pushback, at times there was real pushback, and at times it was really tough for some of the queer kids who were in schools where religion was playing a role that they should not have been playing in the schools (personal interview).

As mentioned previously, Rose indicated numerous times that despite changes in policy, homophobia/transphobia continued to exist. One way in which she highlighted the conflict between layers was when she discussed a former director in the Department of Education who stated he was not comfortable with primary schools discussing same-sex families (Rose, personal interview). This statement conflicts with Jackman's actions of distributing *And Tango Makes Three* to kindergarten teachers. Therefore, the policy legacy of a denominational education system conflicted with efforts to make school spaces safe for sexually diverse students.

Overall, learning, elite attention, organized mobilization and the social construction of target populations were all mechanisms that had a feedback effect, resulting in layering of the Safe and Caring Schools Policy. On the one hand, the release of Egale survey results can be viewed as a focusing event, which began this process of change in Newfoundland/Labrador. On the other hand, educational policy-making at the provincial scale was a locality in which numerous networks converged to negotiate how to support sexually diverse students in safely accessing school spaces. As a result, the Safe and Caring Schools Policy was layered numerous times, complementing the original policy. This layering occurred in the context of an education system that had been multi-denominational less than two decades prior, resulting in some resistance to change.

Conclusion

When provincial governments in Alberta and Newfoundland/Labrador could no longer ignore the fact that sexually diverse students felt unsafe in the school environments, they responded in different ways. Alberta intentionally did not change their education legislation to address this issue. In fact, Alberta attempted to amend legislation that allowed for discrimination within the education system. In other words, policy drift resulted. Newfoundland/Labrador, however, instituted and enforced a government-led initiative to address the issue of LGBTQ+ related violence in schools by layering the existing Safe and Caring Schools Policy. With this change, they became leaders in Canada in the context of sexual diversity and education. Alberta also became leaders; however, the process took longer as they first needed to address policy drift with Bill 10, and then layer that policy with Bill 24. These processes of layering and drift happened through policy feedback mechanisms as discussed in this chapter and identified in the respective case study chapters. In both cases, the process of change was relational as numerous networks of social relations converged at the provincial scale.

Conclusion

Alberta and Newfoundland/Labrador were resistant to changing their human rights legislation to include sexual orientation, which was partially tied to religion in their education systems. However, both provinces, despite these institutional constraints became leaders in the context of provincial education policy that aimed to create safe school environments for sexually diverse students. In this dissertation, I explained how they accomplished this puzzling outcome and provided insights about policy change and contentious policy issues, such as sexual diversity in education. Moreover, I wanted to do more than identify possible explanations for the policy outcomes, which is why I did not focus on theories such as political opportunity or policy entrepreneurs, advocacy coalition or networks. Instead, I aimed to open the 'black box' of causation to understand how policy change happened over time, including the small changes that influenced later actions and/or policy decisions. I tried not to have any preconceived ideas of which policy actors or institutions were involved in this process, but to identify these through process tracing. As a result, I identified multiple feedback mechanisms that together, explain how Alberta and Newfoundland/Labrador changed their education systems. Therefore, to illuminate how this change happened, I integrated theories from gradual institutional change, policy feedback and place/locality as relational.

Overall, I drew from gradual institutional change to demonstrate how provincial education policy in each province changed to create safe school environments for sexually diverse students. More specifically, policy feedback theory was used to understand the feedback mechanisms that explained this process of gradual change, the policy actors, institutions and debates involved in each mechanism, the scales from which they originate, and the resulting networks of social relations that influence provincial educational policy-making. In other words, policy feedback mechanisms explained the entities and actions that generated policy change. Place/locality as relational was used to demonstrate how the interactions of these networks of social relations are institutionalized through negotiations over how to create safe school environments for sexually diverse students. As mentioned above, numerous feedback mechanisms were identified. Some of these mechanisms were case-specific and some more generalizable.

In the case of Alberta, boundary control was case-specific and an integral part of explaining institutional change. As chapter 4 illustrated, this mechanism continued through a feedback process to frame and reframe education legislation as the rights of faith-based parents and sexually diverse students were negotiated. Through the evolution of these debates and the different pieces of legislation, different networks of social relations interacted. These networks included homeschooling parents, faith-based school boards and schools, public school boards, the Alberta Teacher's Association, different advocacy groups in the province, such as the Rocky Mountain Civil Liberties Association, the Calgary Sexuality Center, and the Institute for Sexual Minority Studies and Services. The debates included the role of the Charter and human rights legislation in education. Arguments to exclude references to the Charter and Alberta human rights legislation were justified by leveraging the parental right clause in United Nation's Universal Declaration of Human Rights, which stated parents have a right to choose how their child is educated. While this was not the primary mechanism in Alberta to explain how policy change happened, it is significant for understanding the gradual changes that eventually led to Alberta's status as leaders.

In Newfoundland/Labrador, organized mobilization was a significant case-specific mechanism, especially the role of Susan Rose, who was Egale's Vice-President and a former teacher in Newfoundland. As a result of Rose's efforts, Egale Canada was a partner in changing Newfoundland/Labrador's education system to emerge as leaders. Rose was responsible for arranging the distribution of Egale's 2009 survey to all school boards and for facilitating a relationship between Egale Canada and the Minister of Education. Egale then delivered workshops on LGBTQ+ issues to principals, vice-principals and counsellors in the province and co-developed the MyGSA resource guide that was distributed to the high schools. Without Rose's involvement, the relationship that Egale had with the Minister of Education, and the partnership with the Department of Education may not have happened. Egale's involvement was essential in changing Newfoundland/Labrador's education system.

While the case-specific mechanisms in Alberta and Newfoundland/Labrador were important for explaining institutional change, they are not sufficient to explain how change happened. The purpose of using explaining-outcome process tracing was to identify mechanisms that provide a minimally sufficient explanation. Therefore, I did not try to focus or identify which mechanism was most relevant. Instead, the purpose was to identify the primary mechanisms involved and how, when brought together, they explain how each province gradually changed their education systems through a policy feedback process. However, by comparing the two provinces and how the policy feedback process in each province played out, I argue that the mechanism of elite attention was important in both cases for understanding how policy change can happen when there is a contentious policy issue. First, in both provinces, it was essential that there was not only government support for the policy, but also the capacity to implement the policy and hold the schools and school boards accountable. This support was not conditioned by electoral concerns, but by the desire to create safe school spaces for sexually diverse students and ensure that their rights were respected. Both provinces lost their status as leaders when there was no longer a Minister of Education who held the schools and school boards accountable for creating safe school environments for sexually diverse students. The lack of accountability measures and the coinciding loss of leadership status suggests that when there is support from political leaders for contentious policy issues, and the implementation of a policy is enforced at this scale, there is a greater chance that change will happen in practice.

Theoretical Contributions

I have made two main contributions through this dissertation. First, by identifying the feedback mechanisms that generated policy change, I was able to make visible how the process of gradual policy change happened in each province. The intent of identifying feedback mechanisms was to zoom in to explore the dynamics of gradual policy change. Through this process, I was able to identify that gradual policy change in Alberta happened through policy drift and that in Newfoundland/Labrador, this process occurred through policy layering. I did not come to this conclusion until after I identified the mechanisms and completed my analysis. In this way, identifying and explaining policy feedback mechanisms allowed me to use a 'translucent box' explanation of policy change by illustrating how these mechanisms intersected in shaping education policy, as well as the networks of social relations involved in each mechanism. Using policy feedback mechanisms to explain gradual policy change can be applied in other policy areas to open the 'black box' of causation.

Second, identifying policy feedback mechanisms was a way to illustrate multi-scalar policy processes, including the policy actors and institutions involved, the power dynamics and debates and the scales from which they emerge. By integrating this with locality/place as relational, I was able to further exemplify how a multi-scalar right is localized as different networks of social relations converge within a particular policy-making space to negotiate how to enact this right. In other words, how policy change was relational. I found that this approach was particularly useful in the Alberta case study, where there were two multi-scalar rights that were in conflict. One was the right of sexually diverse students to have safe and equitable access to school spaces and the other was the right of faith-based parents to educate their children according to their religious beliefs. In the case of Newfoundland/Labrador, integrating policy feedback mechanisms and place/locality as relational was particularly useful for exemplifying that institutional change was relational, especially the ways that different government departments, the Newfoundland/Labrador English School Board and Egale Canada partnered and worked together to change the education system in the province. While the Newfoundland/Labrador Provincial Strategy Against Violence had a key role in this partnership, it was identifying the feedback mechanisms through process tracing, and how the resulting networks of social relations interacted that I was able to demonstrate that provincial educational policy-making in this province is a relational process.

While there were theoretical contributions to this dissertation, there were also limitations with the theoretical framework. One of the main limitations was trying to demonstrate the multiple layers of complexity in provincial educational policy change, especially since education policy is multi-scalar. One way to approach this study differently is to apply the theoretical framework at the regional and/or local scale to explore how policy is interpreted and implemented at these scales; however, this was not the intent of my study. Instead, I wanted to question how the conflicts, interests and power dynamics from these scales converged in and shaped provincial policy-making. In this way, I was not able to capture the micro dynamics of how the education system in each province changed.

Additionally, by identifying multiple mechanisms and explaining how together, these explain gradual institutional change, understanding the nuances of these mechanisms was limited. My intent was to identify the key mechanisms that provide a minimally sufficient explanation for institutional change, and how these mechanisms operated in generating change. Future research can build on this work and focus on one mechanism instead of combining mechanisms. This type of research would be more in line with theory-building process tracing.

Practical Implications

In this dissertation, I wanted to understand how Alberta and Newfoundland/Labrador moved from laggards to leaders in the context of education and sexual diversity. I wanted to use these case studies to understand how contentious policy issues could be addressed through provincial policy-making in a way that they have a practical effect in the lives of sexually diverse students. In addition to the support and enforcement of policy by political elites, support and accountability by school boards and schools are also important. Even if policy exists, changes in school culture are needed. This was emphasized by interviewees in both provinces.

While studying education policy and how it is implemented and interpreted at this scale is useful for understanding how the changes in school culture are needed, this approach is also limited because each school/school board is different. They are composed of different street level bureaucrats with varying beliefs and interests. As both case studies illustrated, these differences become particularly problematic when the beliefs of teachers and/or administrators conflicts with the rights of sexually diverse students. Consequently, school spaces are not equally accessible to all sexually diverse students. Therefore, studying change in school culture at the local scale limits how this inequity is addressed. However, as both case studies also exemplified, there is a combination of factors that are key to creating equitable and safe access to school environments for sexually diverse students. These include policies inclusive of sexually diverse communities combined with support of the Minister and Departments of Education, accountability measures for school boards and schools who do not comply with policy, and educating teachers/administrators about sexual diverse issues and how to support these students.

Future Research

One thing that is important to note is that using my theoretical framework to question how institutional change in each province happened limited my ability to explore this process from an intersectional and/or anti-oppressive lens. There were many different components that I was focusing on; therefore, future research could consider how to integrate a more intersectional and anti-oppressive lens into the analysis. This may require adapting the framework to focus less on identifying feedback mechanisms and zooming in more on one or two mechanisms to identify intersectional and anti-oppressive considerations. This type of consideration is important because often, the LGBTQ+ is considered the intersectional aspect when the reality is that there are many intersections among both gender and sexually diverse communities. Therefore, in questioning how policy change happened, it is also important to question the role of intersectionality in this process, who is silenced in this process and if there are communities who are oppressed as a result of this process of change. In this way, the theoretical framework could help identify policy gaps and suggest solutions to address them.

Overall, this dissertation demonstrated the process of gradual institutional change, while providing insights about how institutional change is relational. In particular, it focused on how multi-scalar policy rights are localized in provincial educational policy-making and the policy actors involved in this process. In this way, I identified key aspects that are important for creating safe and equitable access for sexually diverse students, especially how these aspects are multi-scalar and relational. In future research, this framework can be applied in other policy areas, such as health policy, or it can potentially be used as a way to compare case studies even when explaining-outcome process tracing is the method of analysis. This framework can also combine other types of mechanisms to arrive at a minimally sufficient explanation for policy change. More importantly, future research can use this framework to further understanding on the complexity of institutional change.

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Appendix A

Interview Questions: Elected Officials

General Questions

1. Can you give some details about yourself
 - i. How did you become involved in politics?
 - ii. How long have you been/were in politics?
2. What is/was your political party affiliation?
3. What are some of the main issues that are important to your political party?
4. What were your responsibilities as an elected official?
5. Have you had any personal involvement with LGBTQ advocacy work?
 - a. If yes, can you provide further details?
 - i. In what capacity were you involved?
 - ii. How long have you been involved?
 - iii. Can you explain how you became involved?
 - iv. Why is this work important to you?
 - b. If no, are you aware of some of the issues that sexually diverse communities experience?
 - i. If yes, what is your understanding of some of the issues?

Questions about the Policy Process:

1. When did you/your political party become aware that there was an issue with sexually diverse communities in educational institutions?
 - i. When did your political party become involved in the issue?
2. What did you/your political party see as the main issue?
3. Can you explain what actions you/your political party have taken to address the issue of sexual diversity in education policy?
4. Did you/your political party consult with other sources during this process?
 - i. Social movement organization
 - ii. Stakeholders
 - iii. External jurisdictions (other provinces/territories/countries)
5. Which departments were involved in addressing the issue of sexual diversity in education?

6. Has the geography of the province (rural/urban) affected how current education policy is designed? Please explain
7. Was there any resistance to policy change from other political parties? Please explain
8. Are there any external factors that affected the decision-making process regarding current policy?
 - i. If yes, provide details (events, lawsuits, media, religion)

Interview Questions: Organizations

General Questions

6. Can you give some details about yourself
7. What organization do you belong to?
 - a. Can you tell me about this organization?
 - b. What is your role in this organization?
 - c. What are your responsibilities in this position?
8. Have you had any involvement with LGBTQ social movement politics?
 - a. If yes, can you provide further details?
 - i. In what capacity were you involved?
 - ii. How long have you been involved?
 - iii. Can you explain how you became involved?
 - iv. Why is this work important to you?
 - b. If no, are you aware of some of the issues that sexually diverse communities experience?
 - i. If yes, what is your understanding of some of the issues?
 - ii. If no, move to question c.
 - c. Are there any other details and/or comments you would like to share about your involvement with LGBTQ social movements?

Questions about Policy Process

9. Why/how did this group emerge?
10. What is the mandate/vision?
 - a. How does this group work to achieve that?
11. What is your organizations' relationship with the (provincial/federal) government?
12. How/when did your organization become involved in the issue of sexual diversity in education policy?
13. What did your organization see as the main issue/problem?
14. How has your organization participated in government discussions around sexual diversity in education policy?
 - a. Consultation requests with government
 - i. How did consultations come to be?
 - b. Political advocacy work

c. Other type of involvement? Please explain (awareness raising, petition, open protests, media blitzes, etc.)

15. Has your organization participated in the process of including sexual diversity in provincial educational policy?

a. In what way has your organization participated?

i. Has your organization been involved in coalition building with other organizations or social movement groups?

16. Is your organization satisfied with current policy? Why/Why not?

Appendix B

Deductive Codes: Policy Mechanisms

Mechanisms	<p>Boundary Control</p> <ul style="list-style-type: none"> • Constitutional jurisdiction • Local control strategies (provincial legislatures) • National influence (supreme court?, CHRA, Charter?) • Intergovernmental mechanisms (CMEC, CTA) • Moral boundaries <p>Policy Feedback</p> <ul style="list-style-type: none"> • Policy legacies • Information/Interpretive mechanisms <ul style="list-style-type: none"> ▪ Elite attention (increased attention by elites) ▪ Social construction (construction of target populations) ▪ Menu contraction and expansion • Sociopolitical <ul style="list-style-type: none"> ▪ Constituency resources and power (costs and benefits felt by specific groups) ▪ Mass Attitudes (focus on perception of broader public as well as partisan elites and media frame public perceptions) • State capacity <ul style="list-style-type: none"> ▪ Supply side (like constituency resource and power except providers) <p>Policy Diffusion</p> <ul style="list-style-type: none"> • Learning <ul style="list-style-type: none"> ○ Policy learning <ul style="list-style-type: none"> ▪ Social learning (focus on policy problem, scope of policy, policy goals) ▪ Instrumental (focus on policy instruments and implementation design) ○ Political learning (policy advocates reaction to policy environments, need to adapt policy) • Emulation • Competition <p>Layering Drift Conversion</p>
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Appendix C:

Inductive Codes

<p>Relationships</p>	<p>Government interdepartmental Within Province</p> <ul style="list-style-type: none"> • advocacy groups • Teachers associations • LGBTQ+ related • School boards <p>Other provinces</p> <ul style="list-style-type: none"> • advocacy groups • community • Teachers associations • LGBTQ+ related • Government <p>Intergovernmental relationships</p> <ul style="list-style-type: none"> • CMEC <p>Federal government FTP Municipalities International Political consultations</p>
<p>Strategies</p>	<p>Institutional (use of rules) Inside Activist Media Story telling Activism (community side) Prioritize issues Addressing homophobia Teachers Framing Relationship building Visibility petition</p>
<p>Institutions</p>	<p>Legislature Party caucus Cabinet Bureaucracy Electoral Politics</p>

	CMEC Charter/Human Rights Court
Change	Political change Change in beliefs Policy Change/government initiatives Centralization/decentralization Community requests Departmental reorganization Process relational
Context	Historical <ul style="list-style-type: none"> • LGBTQ history • Inclusion of Sexual Orientation in HR • Education history • Political history Political Culture Societal beliefs Religious context Geographical Political opportunity Institutional Homophobia in education Broader context Egale Economy Partisan politics
Interviewee	Role <ul style="list-style-type: none"> • Provide advice • Advocacy Participant Goals <ul style="list-style-type: none"> • Curriculum Previous Experience Personal History
Conceptual	Meaning of inclusion
Policy	Safe and caring schools Inclusive education Bullying GSAs Curriculum policy Education report/documents
Tensions	Policy vs action Legislation vs policy
Challenges	
Strengths	

Proposed Solutions	
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